

Washington State Charter School Commission

CATALYST: BREMERTON CHARTER CONTRACT

Issue Date: June, 2019

CHARTER SCHOOL CONTRACT
FOR THE OPERATION OF CATALYST: BREMERTON

PARTIES:

WASHINGTON STATE CHARTER SCHOOL COMMISSION

CATALYST PUBLIC SCHOOLS

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PARTIES

This agreement is executed on this 22nd day of August 2019 by and between the Washington State Charter School Commission (the “Commission”), an agency of the State of Washington whose mission is to authorize high quality charter public schools throughout the state, and to ensure the highest standards of accountability and oversight for charter schools, and CATALYST PUBLIC SCHOOLS (“Applicant”), a qualified public benefit nonprofit corporation.

RECITALS

WHEREAS, pursuant to chapter 28A.710 RCW, the Charter Schools Act, the people of the state of Washington provided for the establishment of public charter schools in the state of Washington.

WHEREAS, on March 31, 2017, CATALYST PUBLIC SCHOOLS non-profit corporation submitted an application to open and operate a charter school referred to as CATALYST: BREMERTON; and

WHEREAS, on June 29, 2017, the Commission approved the application subject to conditions outlined in Resolution 19-01A; and

WHEREAS, on August 22, 2019, the State Board of Education certified that approval of the application is in compliance with the maximum limit on the number of charter schools allowed under RCW 28A.710.150.

NOW THEREFORE, in consideration of the mutual promises and other consideration recited in this agreement, the Parties agree to the Terms and Conditions of this Contract.

ARTICLE I: PURPOSE, TERM AND CONDITIONS PRECEDENT

Section 1.1 Purpose

This Contract outlines the roles, powers, responsibilities, and performance expectations governing Applicant's establishment and operation of CATALYST: BREMERTON, (the "School"), a public school. Applicant must comply with all of the terms and provisions of this Charter School Contract ("Contract") and all applicable rules, regulations and laws.

Section 1.2 Term of Contract

This Contract is effective August 19, 2020 and will remain in full force and effect through August 19, 2025, unless sooner revoked or terminated as provided herein. Funding under this agreement shall not commence until the Pre-Opening Conditions (Attachment 1: Pre-Opening Process and Conditions) have been completed to the satisfaction of the Commission, and the school begins to operate.

Section 1.3 Pre-Opening Conditions

The School shall meet all of the Pre-Opening Conditions identified in Attachment 1: Pre-Opening Process and Conditions by the dates specified. Satisfaction of all Pre-Opening Conditions is a condition precedent to the formation of a contract. The Commission may waive or modify the conditions contained in the Pre-Opening Conditions or may grant the School an additional planning year upon good cause shown. If the School requires a delay of more than one year, it must request an extension from the Commission in writing by July 1, 2020.

ARTICLE II: DEFINITIONS

For the purposes of this Contract, and in addition to the terms defined throughout this Contract, each of the following words or expressions, whenever capitalized, shall have the meaning set forth in this section:

“Applicant” means, in addition to the definition set forth in the Charter Schools Act, the qualified non-profit corporation that submitted the Application that was approved by the Commission and is subject to this Contract. For purposes of this Contract the School, School Board, Charter School Board, Board, and Applicant are one and the same and are responsible for compliance with all legal requirements to which the School is subject under Applicable Law and this Contract.

“Application” means the application and supporting documentation submitted by the Applicant to the Commission seeking to open and operate a charter school in response to the Commission’s solicitation. The Application is incorporated into, and made part of, this Contract. It is attached as Attachment 12: Public Charter School Application.

“Applicable Law” means all local, state, and federal laws, ordinances, rules and regulations applicable to the operation of a charter school in the State of Washington, as they currently exist or are amended throughout the duration of the Contract. When a provision of this Contract requires the School to comply with all federal, state, and local laws, ordinances, rules, or regulations, or some combination thereof, without specific reference or citation, the language encompasses those laws that are applicable to charter schools. If there is a disagreement about what laws are applicable or the extent to which a given law is applicable, the parties shall engage in good faith discussions in an effort to determine applicability and the associated scope. However, the Commission shall be the ultimate authority regarding what laws apply to the charter schools it has authorized and the extent to which they apply.

“Articles and Bylaws” means the Applicant’s articles of incorporation and bylaws as defined in Chapter 24.03RCW.

“Asset” means land, infrastructure, improvements to land, buildings, leasehold improvements, vehicles, furnishings, equipment, collections, and all other tangible and intangible assets that are used in school operations, including Small and Attractive Assets.

“Attachment” means the following contract documents: Attachment 1: Pre-Opening Process and Conditions; Attachment 2: Governance Documents; Attachment 3: Board Roster and Disclosures; Attachment 4: Educational Program Terms and Design Elements; Attachment 5: Conflict of Interest Policy; Attachment 6: Education Service Provider (ESP) Contract Guidelines; Attachment 7: Physical Plant; Attachment 8: Statement of Assurances; Attachment 9: Identification of Documentation Required for Annual Performance Report; Attachment 10: Enrollment Policy; Attachment 11: Request for Proposals; Attachment 12: Public Charter School Application.

“Charter Schools Act” means all provisions of ESSB 6194 as codified, and any amendments thereto. ESSB 6194 was primarily codified in chapter 28A.710 RCW. Statutory terms defined in the Charter Schools Act shall have the same meaning in this Contract, unless otherwise indicated.

“Contract” means, in addition to the definition set forth in the Charter Schools Act, these Terms and Conditions, the Approval Resolution, the Application, Attachments, and the Master Calendar.

“Commission” means, in addition to the definition set forth in the Charter Schools Act, the authorizing entity responsible for discharging its obligations under this Contract, the Charter Schools Act, and conducting oversight to ensure that Applicant complies with its obligations in the operation of the School. The term Commission includes the Commission’s staff, employees, or other designee.

“Encumber” means the use of money or assets as collateral for loans or extensions of credit, the granting of a lien or creation of a liability that is attached to real or personal property of the Applicant.

“Education Service Provider” (ESP) means an individual, partnership, or corporation that is paid \$10,000 or more to provide services necessary to operate and/or oversee the School’s educational program. This includes, but is not limited to provision of school or program design and implementation, development of pedagogical approaches, curricula, instructional materials, assessments and professional development programs, and management services. School may only contract for management operations with a non-profit ESP. For purposes of this contract, ESP does not include contracts between the School and a third-party to provide back-office functions such as fiscal services, accounting services or facilities operations, those contracts are governed by Section 5.19 Third-Party Education Service Provider Contracts

“Known” or “Knowledge” means that a representative of Applicant and/or the School is aware of a fact, circumstance, or result, or has information that would lead a reasonable person in the same situation to believe that the facts, circumstances, or results exist. When knowledge triggers or impacts a legal responsibility or obligation of the Applicant or School, then failure to act in accordance with those legal responsibilities or obligations may be considered a material and substantial violation of this Contract.

“Master Calendar” means the compliance calendar annually issued by the Commission.

“Performance Audit” means an objective and systematic assessment of a charter school or any of its programs, functions, or activities by an independent evaluator in order to help improve efficiency, effectiveness, and accountability. Performance audits include economy and efficiency audits and program audits. Performance audits must be conducted according to U.S. Government Accountability Office auditing standards, known as Yellow Book standards. RCW 43.09.430(6); <http://www.sao.wa.gov/state/Pages/Aboutperformanceaudits.aspx#.VOXQs032ZEZ>; ESSB 6194, Sec. 103 (codified at RCW 28A.710.030(2)).

“School” means the school that the Applicant was authorized to establish that is governed by the Board. For purposes of this Contract the School, School Board, Charter School Board, Board, and Applicant are one and the same and are responsible for compliance with all legal requirements to which the School is subject under Applicable Law and this Contract.

“School Board,” “Charter School Board,” or “Board” means the charter school board, as defined in the Charter Schools Act, and must at all times be appointed, operated, and governed in accordance with its Bylaws, the Application, legal obligations, and this Contract. For purposes of this Contract the School, School Board, Charter School Board, Board, and Applicant are one and the same and are responsible for compliance with all legal requirements to which the School is subject under Applicable Law and this Contract.

“Small and Attractive Assets” include, but are not limited to Optical Devices, Binoculars, Telescopes, Infrared Viewers, Rangefinders, Cameras and Photographic Projection Equipment, Desktop Computers (PCs), Laptops and Notebook Computers, Tablets and Smart Phones, Television Sets, DVD Players, Blu-ray Players, and Video Cameras (home type).

ARTICLE III: SCHOOL'S MISSION

Section 3.1 Mission

The mission of the School is as follows: Catalyst: Bremerton supports our diverse scholars to live full lives and to succeed in college, career, and life. Scholars will find their purpose and passion so that they can cultivate the critical hope, optimism, and leadership essential to be catalysts in their community and world.

ARTICLE IV: GOVERNANCE

Section 4.1 Governance

The School shall be governed by its Board in a manner that is consistent with the terms of this Contract so long as such provisions are in accordance with state, federal, and local law. The Board shall have final authority and responsibility for the academic, financial, and organizational performance of the School, the fulfillment of the contract, and approval of the School's budgets.

The Board shall be responsible for policy and operational decisions of the School, and, consistent with the terms of this Contract, shall be the employer of school employees. Nothing herein shall prevent the Board from delegating decision-making authority for policy and operational decisions to officers, employees and agents of the School. However, such delegation will not relieve the Board of its obligations under the law or this Contract, should the School fail to satisfy those obligations.

The Board shall govern the School in a manner that ensures that it will satisfy its legal obligations, including, but not limited to: compliance with all Applicable Laws, the Contract, and fidelity to the program and policies described and submitted in the Application. This includes the exercise of continuing oversight over the School's operations.

Section 4.2 Governance Documents

The Applicant and School shall maintain legal status and operate in accordance with the terms of the attached Governance Documents, Attachment 2: Governance Documents, and the Application.

Section 4.3 Non-Profit Status

The School shall be operated by a stand-alone public benefit non-profit corporation as defined under Washington at all times throughout the term of this contract.

Section 4.4 Organizational Structure and Plan

The School shall implement and follow the organizational plan described in the Application.

Section 4.5 Composition

The composition of the Board shall at all times be determined by and consistent with the Articles and Bylaws and Applicable Law. The roster of the Board and each member's disclosure form are attached to this Contract as Attachment 3: Board Roster and Disclosures (initially or as amended, the "Board Roster and Disclosures").

Section 4.6 Change in Status or Governance Documents

The Applicant shall not alter its legal status, restructure or reorganize without first obtaining written authorization from the Commission.

The Board shall notify the Commission of any modification of the School's Bylaws within five (5) business days of approval by the Board. Provided, however, that any change in the Bylaws that impacts a material term of this Contract requires written authorization from the Commission.

The Board shall notify the Commission of any changes to the Board Roster and Disclosures within five (5) business days of their taking effect and provide an amended Board Roster and Disclosures. If, at any time, the Board fails to operate in accordance with the terms of its Bylaws it shall immediately notify the Commission of that failure.

Section 4.7 Affiliation

Notwithstanding any provision to the contrary in the Contract, Application, or the Articles and By-laws, in no event shall the Board, at any time, be composed of voting members of whom a majority are directors, officers, employees, agents or otherwise affiliated with any single entity (with the exception of the School itself or of another charter school), regardless of whether said entity is affiliated or otherwise partnered with the School. For the purposes of this paragraph, "single entity" shall mean any individual entity, as well as any and all related entities to such entity such as parents, subsidiaries, affiliates and partners. The Commission may, at its sole discretion, waive this restriction upon a written request from the School.

As used in this provision of the contract, an individual is affiliated with a single entity if the individual is associated with, a member of, or has otherwise publicly linked himself/herself with the entity.

Section 4.8 Conflicts of Interest

The Board adopted Conflicts of Interest Policy is attached to this agreement as Attachment 5: Conflict of Interest Policy and shall at all times comply with its provisions. Any amendment to Attachment 5: Conflict of Interest Policy must be adopted by the Board and approved in writing by the Commission, which shall not be unreasonably withheld. Any approved changes may be made without amendment to this agreement.

Section 4.9 Open Meetings

Starting from the date that this Contract is signed, the Board shall maintain Board-adopted policies, meeting agendas and minutes, shall make such documents available for public inspection in accordance with the requirements in chapter 42.56 RCW, and shall otherwise conduct open meetings consistent with chapter 42.30 RCW, the Open Public Meetings Act.

Section 4.10 Public Disclosure Filing

Board members must file personal financial affairs statements with the public disclosure commission between January 1st and April 15th and/or within two weeks of becoming a member of the board. Board members must comply with the Board's Conflicts of Interest Policy and ethical obligations to determine whether the financial disclosures reveal a conflict of interest or ethical violation.

ARTICLE V: GENERAL OPERATIONAL REQUIREMENTS

Section 5.1 General Compliance

The School and the Board shall operate at all times in accordance with all Applicable Law, the Contract and Commission policies, as the same may be amended from time to time.

Section 5.2 Public School Status

The School shall be deemed a public school, and local education agency, subject to all Applicable Law, including but not limited to health and safety, parents' rights, civil rights, nondiscrimination laws, public records laws, student assessment, assessment administration, data collection, reporting, and remediation requirements. These requirements include, but are not limited to, those imposed under chapter 28A.642 RCW (discrimination prohibition); chapter 28A.640 RCW (sexual equality); the Individuals with Disabilities Education Improvement Act (20 U.S.C. Sec. 1401 et seq.); the Federal Educational Rights and Privacy Act (20 U.S.C. Sec. 1232g), McKinney-Vento homeless assistance act of 1987 (42 U.S.C. Sec. 11431 et seq.), and the Elementary and Secondary Education Act (20 U.S.C. Sec. 6301 et seq.).

Section 5.3 Nonsectarian Status

The School shall be nonsectarian in its programs, admissions policies, employment practices and all other operations. The School shall not be to any extent under the control or direction of any religious denomination.

Section 5.4 Access to Individuals and Documents

The School shall provide the Commission with access to any individual, documentation, evidence or information requested by the Commission. The School affirmatively consents to the Commission obtaining information and documents directly from any entity or individual who may possess information or documents relevant to the operation of the school and will sign any releases or waivers required by such individuals or entities. Failure to provide this access by the deadlines imposed by the Commission will be a material and substantial breach of the Contract.

Section 5.5 Ethics

The identified School representatives will adhere to the following ethical standards:

- a.** No Board member, School administrator, or other School employee/representative authorized to enter contracts on behalf of the School, may be beneficially interested, directly or indirectly, in a contract, sale, lease, purchase, or grant that may be made by, through, or is under the supervision of the officer or employee, in whole or in part, or accept, directly or indirectly, any compensation, gratuity, or reward from any other person beneficially interested in the contract, sale, lease, purchase, or grant.
- b.** No Board member or School administrator may use his or her position to secure special privileges or exemptions for himself, herself, or others.

- c. No Board member or School administrator may give or receive or agree to receive any compensation, gift, reward, or gratuity from a source except the School, for a matter connected with or related to their services as a Board member or School administrator unless otherwise provided for by law.
- d. No Board member or School administrator may accept employment or engage in business or professional activity that the officer might reasonably expect would require or induce him or her by reason of his or her official position to disclose confidential information acquired by reason of his or her official position.
- e. No Board member or School administrator may disclose confidential information gained by reason of the officer's position, nor may the officer otherwise use such information for his or her personal gain or benefit.
- f. Terms in this provision will be defined in accordance with the definitions set out in RCW 42.52.010. The Advisory Opinions of the Executive Ethics Board shall provide non-binding guidance for the parties' interpretation of this provision.

Section 5.6 Public Records

The Applicant shall comply with the provisions of the Public Records Act, chapter 42.56 RCW and is responsible for ensuring that the School, its Board, its employees, contractors, staff, and volunteers comply with the act and any associated Board policies. This provision survives the term of the contract as long as the Applicant has the public records generated during its operation of a charter public school in its possession. The provision shall remain in effect until the complete and successful transfer of the records to the appropriate public successor entities.

Section 5.7 Record Keeping

The Applicant will comply with all Applicable Law, and Commission record keeping requirements including those pertaining to students, governance, and finance. **At a minimum, student records must include records concerning attendance, grades, meal status, special education, bilingual information, student programs, state assessments, emergency contact, student health information, and certificate of immunization or exemption. These records shall be maintained in accordance with governing document retention periods set out by the Secretary of State.** This provision survives the term of the contract as long as the Applicant has the public records generated during its operation of a charter public school in its possession. The provision shall remain in effect until the complete and successful transfer of the records to the appropriate public successor entities.

Section 5.8 Non-Discrimination

The School shall not discriminate against any student, employee or any other person on the basis of race, ethnicity, national origin, gender, disability or any other ground that would be unlawful if done by any other public school. It shall take all steps necessary to ensure that discrimination does not occur, as required by state and federal civil rights and anti-discrimination laws.

Section 5.9 Inventories

The School shall maintain a complete and current inventory of all school Assets that cost more than \$5,000 (including sales tax and ancillary costs) and Small and Attractive Assets that cost \$300 or more (including sales tax and ancillary costs). The School shall update the inventory annually and shall take reasonable precautions to safeguard assets acquired with public funds.

If the Contract is revoked, terminated, non-renewed or surrendered, or the School otherwise ceases to operate, Assets shall be deemed to be public assets if at least 25 percent of the funds used to purchase the asset were public funds. Public funds include, but are not limited to, funds received by the School under chapter 28A.710 RCW, as well as any state or federal grant funds. Any assets acquired wholly with private funds shall be disposed of consistent with Washington nonprofit law, provided that the School must maintain records demonstrating the percentage of public funds used to acquire assets. If the School's records fail to establish clearly whether an asset was acquired with the use of public funds, the assets shall be deemed to be public assets.

Section 5.10 Administrative Records

The School will maintain all administrative records, including student academic records, required by law and Commission policies and procedures.

Section 5.11 Student Welfare and Safety

The School shall comply with all Applicable Law concerning health and safety, including, but not limited to, state laws regarding the reporting of child abuse and neglect, accident prevention, school safety plans, emergency drills, notification of criminal conduct to law enforcement as well as disaster response, and any applicable state and local regulations governing the operation of school facilities.

Section 5.12 Transportation

The School shall be responsible for providing students transportation in accordance with legal obligations and consistent with the plan proposed in the approved application, page 99.

Section 5.13 Staff Qualifications

Instructional staff, employees, and volunteers shall possess all applicable qualifications as required by state or federal law. Instructional staff shall maintain active certification in accordance with chapter 28A.410 RCW, unless instructional staff meets the requirements of RCW 28A.150.203(7).

Instructional staff must also adhere to the code of professional conduct, ethical standards governing educator conduct, and associated laws and regulations. If the Board or School administrator(s) have reason to believe that an employee with a certificate or permit authorized under chapter 28A.410 RCW or chapter 28A.405 RCW, has engaged in unprofessional conduct (Chapter 181-87 WAC) or lacks good moral character (Chapter 181-86 WAC) a complaint must be submitted to the Education Service District within which the school operates stating the basis for the belief and requesting submission of the complaint to OSPI. A copy of the School's complaint must simultaneously be sent to the Commission and OSPI's Office of Professional

Practices. Certificated and licensed staff shall also be held accountable in accordance with the provisions of Title 28A RCW as well as any applicable state or federal laws.

Section 5.14 Staff Training

The School shall provide employees and staff with training required by applicable state and/or federal law as well as any additional training that is an essential design element of the educational program as required in Attachment 4: Educational Program Terms and Design Elements.

Section 5.15 Student Conduct and Discipline

The School's discipline policy must satisfy constitutional due process requirements. The School shall comply with the School's discipline policy and all Applicable Law relating to student discipline including, but not limited to, RCW 28A.150.300, 28A.600.015 and 28A.600.022.

Section 5.16 Transactions with Affiliates

The School shall not, directly or indirectly, enter into or permit to exist any transaction (including the purchase, sale, lease or exchange of any property or the rendering of any service) with any affiliate of the School, any member past or present of the Board, or any employee past or present of the School (except in their employment capacity), or any family member of the foregoing individuals, unless:

- a. The terms of the transaction do not violate the Schools' Code of Ethics and Conflict of Interest Policy, the fiduciary obligations applicable to non-profit boards and Section 5.5 of this Contract;
- b. The terms of such transaction (considering all the facts and circumstances) are no less favorable to the School than those that could be obtained at the time from a person that is not such an affiliate, member or employee or an individual related thereto;
- c. The involved individual recuses him or herself from all Board discussions, and does not vote on or decide any matters related to such transaction;
- d. The Board discloses any conflicts and operates in accordance with a conflict of interest policy that has been approved by the Commission.

"Affiliate" as used in this section means a person who directly or indirectly owns or controls, is owned or controlled by, or is under common ownership or control with, another person. Solely for purposes of this definition, owns, is owned and ownership mean ownership of an equity interest, or the equivalent thereof, of ten percent or more, and the term "person" means an individual, partnership, committee, association, corporation or any other organization or group of persons. The Applicant, School and Board are Affiliates as defined in this provision.

Section 5.17 Contracting for Services

Nothing in this Contract shall be interpreted to prevent the School from entering into contracts or other agreements with a school district, educational service district, or other public or private entity for the provision of real property, equipment, goods, supplies, and services, related to the operation of the School consistent with the law and the terms of this Contract.

The terms of such contracts for services shall be negotiated between the School and the other entity. Such contracts shall, at all times, be subject to the requirements of this Contract and will not relieve the School of its responsibilities under this Contract. This provision is subject to the limitations set out in this Contract.

Section 5.18 School Authorized as Part of a Charter Management Organization

In its application, School was identified as a new school to be operated by Catalyst Public Schools, a non-profit charter management organization (CMO). As such, School's relationship with Catalyst Public Schools, is not subject to the procedures outlined in "Section 5.19 Third-Party Education Service Provider Contracts." School is otherwise subject to "Section 5.19 Third-Party Education Service Provider Contracts" and, in all other instances, School and Catalyst Public Schools are bound by the terms of this agreement and all applicable laws.

Section 5.19 Third-Party Education Service Provider Contracts

- a. Limit to Scope of ESP Contracting.** The School shall not, without written approval of the Commission, contract with an ESP to provide substantial educational services, management services, or both on behalf of the School. Substantial is defined as the assumption of responsibility for all or most of the educational, governance, or managerial components of a School's operations.
- b. Proposed ESP Contract.** At least 90 days before the proposed effective date of an ESP contract, the ESP and the School shall enter into a legally binding and enforceable contract that is subject to approval of the Commission and the requirements of this Contract. Attachment 6: Education Service Provider (ESP) Contract Guidelines contains Education Service Provider Agreement Guidelines that the School must observe. Within 24 hours of entering into the proposed contract, the School shall forward the proposed ESP contract to the Commission for review.
- c. Required ESP Contract Terms.** The proposed ESP contract shall set forth with particularity, among other things, (i) the contingent obligations and responsibilities of each party in the event that the contract must be modified in order to obtain or maintain the School's status under state and federal law, and (ii) the extent of the ESP's participation in the organization, operation and governance of the School.
- d. Review by Commission.** The Commission shall review the proposed ESP Contract and determine, within 60 days of receiving it from the School, whether it meets approval of the Commission. Approval will be contingent on satisfaction of the terms of RCW 28A.710.130(4) and evidence that the ESP contract will not detrimentally impact the School's viability, or violate the terms of this Contract or the law.
- e. Representation by Attorney.** The School shall be represented by an attorney during the negotiation of the proposed ESP Contract. Upon submission of the ESP contract for review by the Commission it shall be accompanied by a letter from a licensed attorney representing the School stating that the Management Contract meets the attorney's approval. Such attorney may not represent or be retained by the Management Provider.
- f. Effect of ESP Contract.** The School will remain ultimately responsible and accountable for its legal and contractual obligations; an ESP contract will not relieve the School of those obligations.

Section 5.20 Complaints

The School shall establish a process for resolving public complaints, including complaints regarding curriculum, which shall include an opportunity for complainants to be heard. The final administrative appeal shall be heard by the Board, not the Commission.

Section 5.21 Notification to Commission

a. Timely Notification. The School shall timely (within 24 hours) notify the Commission (and other appropriate authorities) in the following situations:

1. The discipline of employees at the School that:
 - i. Results in suspension or termination;
 - ii. Resignation in lieu of discipline;
 - iii. Arises from misconduct or behavior that may have endangered the educational welfare or personal safety of students, teachers, or other colleagues within the educational setting; or
 - iv. Is based on serious or repeated violations of law.

2. Any complaints filed, or action taken, against the School by any governmental agency.

b. Immediate Notification. The School shall immediately notify the Commission of any of the following:

1. Known conditions that may cause it to vary from the terms of this Contract, applicable Commission requirements, federal, and/or state law;
2. Non-compliance with the Applicant's legal obligations or Contract provisions;
3. Any circumstance requiring the closure of the School, including, but not limited to, a natural disaster, such as an earthquake, storm, flood or other weather related event, other extraordinary emergency, or destruction of or damage to the School facility;
4. Criminal allegations against, or arrest of any members of the Board or School employees for a crime punishable as a felony, crime involving a child, or any crime related to the misappropriation of funds or theft, if the Board, School, or any agent, employee, or representative thereof has reason to believe that an arrest occurred;
5. Misappropriation of school funds;
6. A known default on any obligation, which shall include debts for which payments are past due by sixty (60) days or more; or
7. Any change in its corporate status with the Washington Secretary of State's Office or status as a 501(c)(3) corporation.

Section 5.22 School Calendar

The School shall adopt a School calendar with an instructional program that meets the compulsory school attendance requirements of state law, financial guidelines, and state regulations. By June 30th of each year, the School will develop a school calendar for the following year and submit it to the Commission. Any changes that cause the calendar to differ materially from the calendar proposed and approved in the School's charter application are subject to Commission approval.

Section 5.23 Litigation and Constitutional Challenges.

The Board shall, through web site postings and written notice with receipt acknowledged by signature of the recipient, advise families of new, ongoing, and prospective students of any ongoing litigation challenging the constitutionality of charter schools or that may require charter schools to cease operations.

Section 5.24 Multiple School Applicants and Operators

An Applicant that has been authorized to open one school must successfully execute its legal obligations to the satisfaction of the Commission before any subsequent school may open.

ARTICLE VI: ENROLLMENT

Section 6.1 Enrollment Policy

The School shall comply with Applicable Law and the enrollment policy approved by the Commission and incorporated into this agreement as Attachment 10: Enrollment Policy.

Section 6.2 Maximum Enrollment

The maximum number of students who may be enrolled in the first year of operation of the School shall be 224 students, with an ability to exceed this amount by no more than 25 students, to the extent that the School's facility and staffing can accommodate such a number and maintain compliance with Applicable Law and the Contract. If the School wishes to enroll more than the maximum number of students listed above, it shall, before exceeding this number, provide evidence satisfactory to the Commission that it has the capacity to serve the larger population. The maximum enrollment shall not exceed the capacity of the School facility.

Section 6.3 Annual Enrollment Review

As necessary, the maximum enrollment of the School will be adjusted annually by the Board in consultation with the Commission and with consideration of the School's ability to facilitate the academic success of its students, achieve the objectives specified in the Contract, and assure that its student enrollment does not exceed the capacity of its facility.

Section 6.4 Decrease in Enrollment

The School shall immediately report a decrease in enrollment of 20%, or more, to the Commission.

Section 6.5 Student Transfers and Exits

Any student exiting out of the School shall be documented by an exit form signed by the student's parent or guardian, which affirmatively states the reason for the transfer or exit and that the student's transfer or exit is voluntary. The School shall collect and report to the Commission, in a format required or approved by the Commission, exit data on all students transferring from or otherwise exiting the school for any reason (other than graduation), voluntary or involuntary. Such exit data shall identify each departing student by name and shall document the date of and reason(s) for each student departure. In the event that the School is unable to document the reasons for a voluntary withdrawal, the School shall notify the Commission and provide evidence that it made reasonable efforts to obtain the documentation described in this section.

Section 6.6 Right to Remain

The School shall comply with the McKinney-Vento Act, 42 U.S.C. 11432 et seq. Students who fail to attend the School as required by RCW 28A.225.010 may be removed from the School's rolls only after the requisite unexcused absences have been documented and all truancy procedures followed, consistent with chapter 28A.225 RCW, the provisions of the McKinney-Vento act, and Commission policy.

ARTICLE VII: TUITION AND FEES

Section 7.1 Tuition Fees

The School will not charge tuition. The School shall not charge fees except as allowed by Applicable Law.

ARTICLE VIII: EDUCATIONAL PROGRAM/ACADEMIC ACCOUNTABILITY

The School is required to implement, deliver, support, and maintain the design elements and education program terms described in its Application.

Section 8.1 Educational Program Terms and Design Elements

The School shall implement, deliver, support and maintain the essential design elements of its educational program, as described in its Application. Design elements include, but are not limited to, the mission, vision, objectives and goals, and the educational program terms identified in Attachment 4: Educational Program Terms and Design Elements.

Section 8.2 Material Revisions to the Educational Program Terms and Design Elements

Material revisions and/or amendments to the essential design elements and education program terms shall require the Commission's pre-approval. Failure to implement, deliver, support and maintain the essential design elements of the School's educational program is a material and substantial breach of the Contract.

Section 8.3 Content Standards

The School's educational program shall meet or exceed basic education standards. The School is also subject to the supervision of the Office of the Superintendent of Public Instruction (OSPI) and the State Board of Education. Standards that must be met by the school include, but are not limited to:

- a. Basic education, as defined in RCW 28A.150.200, .210 and .220;
- b. Instruction in the essential academic learning requirements (learning standards) and associated standards;
- c. Participation in, and performance on, statewide student assessments;
- d. Performance improvement goals and associated requirements;
- e. Accountability measures;
- f. State graduation requirements;
- g. Academic standards applicable to noncharter public schools;
- h. Standards and requirements contained in the Performance Framework; and
- i. Other state and federal accountability requirements imposed by law, regulation, policy or this Contract.

Section 8.4 Assessments

The School shall participate in and properly administer the academic assessments required by OSPI, the State Board of Education, and Applicable Law, as well as those assessments that are an essential design element of the educational program as required in Attachment 4: Educational Program Terms and Design Elements. The School shall comply with all assessment protocols and requirements as established by the OSPI and the State Board of Education, maintain test security, and administer the tests consistent with all relevant state and Commission requirements. The School shall follow OSPI's administration and security requirements associated with those tests being administered.

Section 8.5 Graduation Requirements for High Schools

The School's curriculum shall meet or exceed all applicable graduation requirements as established by the State Board of Education.

Section 8.6 English Language Learners

The School shall at all times comply with all Applicable Law governing the education of English language learners including, but not limited to, the Elementary and Secondary Education Act (ESEA), Title VI of the Civil Rights Act of 1964, the Equal Educational Opportunities Act of 1974 (EEOA), RCW 28A.150.220, RCW 28A.180.010 to 28A.180.080. The School shall provide resources and support to English language learners to enable them to acquire sufficient English language proficiency to participate in the mainstream English language instructional program. The School shall employ and train teachers to provide appropriate services to English language learners. The School must implement, deliver, support, and maintain an education program that provides all the legally required education and services to English language learners.

Section 8.7 Students with Disabilities

The School shall provide services and accommodations to students with disabilities as set forth in the Application and in accordance with any relevant policies thereafter adopted, as well as with all applicable provisions of the Individuals with Disabilities Education Act (20 U.S.C. § 1401 et seq.) (the "IDEA"), the Americans with Disabilities Act (42 U.S.C. § 12101 et seq.) (the "ADA"), section 504 of the Rehabilitation Act of 1973 (29 U.S.C. § 794) ("Section 504"), and all applicable regulations promulgated pursuant to such federal laws. This includes providing services to attending students with disabilities in accordance with the individualized education program ("IEP") recommended by a student's IEP team. The School shall also comply with all applicable federal and State laws, rules, policies, procedures and directives regarding the education of students with disabilities including, but not limited to, chapter 28A.155 RCW.

ARTICLE IX: FINANCIAL ACCOUNTABILITY

Section 9.1 Legal and Accounting Compliance

The School shall comply with all Applicable Law, including but not limited to, state financial and budget rules, regulations, and financial reporting requirements, as well as the requirements contained in the Commission's Charter School Performance Framework, chapter 108-30 WAC. The School shall also adhere to generally accepted accounting principles and be subject to financial examinations and audits as determined by the Commission or the state auditor, including annual audits for legal and fiscal compliance.

Section 9.2 Governance, Managerial and Financial Controls

At all times, the School shall maintain appropriate governance and managerial procedures and financial controls which procedures and controls shall include, but not be limited to:

- a. Generally Accepted Accounting Principles and the capacity to implement them;
- b. A checking account;
- c. Adequate payroll procedures;
- d. An organizational chart;
- e. Procedures for the creation and review of monthly and quarterly financial reports, which procedures shall specifically identify the individual who will be responsible for preparing such financial reports in the following fiscal year;
- f. Internal control procedures for cash receipts, cash disbursements and purchases;
- g. Procedures identified in the Application; and
- h. Maintenance of asset registers and financial procedures for grants in accordance with applicable state and federal law.

Section 9.3 Non-Commingling

Assets, funds, liabilities and financial records of the School shall be kept separate from assets, funds, liabilities, and financial records of any other person, entity, or organization unless approved in writing by the Commission. Additionally, public funds and assets received by the School shall be tracked and accounted for separately.

Section 9.4 Encumbrances

The School may issue secured and unsecured debt, including pledging, assigning or encumbering its assets to manage cash flow, improve operations, or finance the acquisition of real property or equipment. Provided that the School shall not:

- a. Pledge, assign or encumber any public funds received or to be received pursuant to RCW 28A.710.220;
- b. Encumber its assets in a manner that will jeopardize its fiscal viability;
- c. Pledge the full faith and credit of the state or any political subdivision or agency of the state;
- d. Encumber other funds that contain a restriction or prohibition on such encumbrance; or

- e. Encumber any funds or assets in violation of the law.

Section 9.5 Bank Accounts

The School shall, upon request, provide the Commission with the name of each financial institution with which it holds an account along with the associated account number. At the election of the Commission, the School may be required to obtain documentation from all of the School's bank accounts or to sign a release and authorization that allows the financial institution to provide documents and information directly to the Commission.

Section 9.6 Quarterly Reports

The School shall prepare quarterly financial reports for the Commission in compliance with generally accepted accounting principles. Such reports shall be submitted to the Commission 45 days after the quarter end for quarters 1, 2 and 3 and 180 days after the year end. The form of the quarterly reports will be determined by the Commission. Fourth quarter and year end reports shall be submitted with the annual independent financial audit.

Section 9.7 Accounting Methods and Records

The School agrees to maintain financial records in accordance with generally accepted accounting principles and to make such records available promptly to the Commission upon request. When the request is for on-site inspection of records, prompt is defined as immediate access. If the request is for reproduction of records, then the Commission will include a timeframe in which the records must be provided; adherence to this timeframe will be considered prompt.

Section 9.8 State Accounting Requirements

The School shall use and follow all policies and requirements issued by the Washington State Auditor's office concerning accounting for public school districts in the state of Washington. The School shall also comply with public school budget and accounting requirements, the Accounting Manual for School Districts and the Administrative Budgeting and Financial Reporting Handbook.

Section 9.9 Financial Records and Separate Accounting

The School shall record all financial transactions in general, appropriations, and revenue and expenditures records. In addition, the School shall make appropriate entries from the adopted budgets in the records for the respective funds, and shall maintain separate ledgers accounting for funds by funding source. Accounts must be reconciled on a monthly basis.

Section 9.10 Location and Access

The School shall maintain, or cause to be maintained, books, records, documents, and other evidence of accounting procedures and practices which sufficiently and properly reflect all direct and indirect costs of any nature expended in the performance of this Contract. These records shall be subject at all reasonable times to inspection, review, or audit by personnel duly authorized by the Commission, the Office of the State Auditor, and federal officials so authorized by law, rule, regulation, or contract. The financial records must

be maintained for immediate access by the Commission and reasonable access by the public as required by law.

Section 9.11 Filing and Notice

The School shall comply with notice and filing requirements of non-profit corporations.

Section 9.12 Disbursement Procedures

The School shall establish procedures for ensuring that funds are disbursed for approved expenditures consistent with the School's budget.

Section 9.13 Compliance with Finance Requirements

The School shall comply with all other legal requirements imposed on charter school finances, budgeting, accounting and expenditures. The Parties will collaborate to assure that they each remain reasonably current on the impact of any legal modifications on charter schools. The School holds ultimate responsibility for compliance with the legal requirements associated with charter school finances, budgeting, accounting and expenditures.

Section 9.14 Budget

Section 9.14.1 Annual Budget Statement

The governing board of the School shall adopt an annual budget statement that describes the major objectives of the educational program and manner in which the budget proposes to fulfill such objectives.

Section 9.14.2 Annual Budgets

On or before July 10th of each year, the School will submit to the Commission the School's proposed budget for the upcoming fiscal year (September 1 through August 31st). The School shall adopt a budget for each fiscal year, prior to the beginning of the fiscal year. The budget shall:

- a. Be presented in a summary format which is consistent with accepted practice in the field;
- b. Be presented in a summary format that will allow for comparisons of revenues and expenditures among charter schools by pupil;
- c. Be presented in a format approved by the Commission;
- d. Show the amount budgeted for the current fiscal year;
- e. Show the amount forecasted to be expended for the current fiscal year;
- f. Show the amount budgeted for the upcoming fiscal year;
- g. Specify the proposed expenditures and anticipated revenues arising from the contracting of bonded indebtedness by a capital improvement zone, if applicable;
- h. Be balanced with expenditures, inter-fund transfers, or reserves not in excess of available revenues and beginning fund balances; and
- i. Reconcile beginning fund balance on a budgetary basis. Schools with under 1,000 full-time equivalent students for the preceding fiscal year may make a uniform election to be on the cash basis

of revenue and expenditure recognition, except for Debt Service Funds. All other schools shall be on the modified accrual basis for budgeting, accounting, and financial reporting. The School's reconciliation shall include but need not be limited to the liability for accrued salaries and related benefits. The reconciliation shall be included with the final version of the amended budget and the annual audited financial statements.

Section 9.14.3 School Funding

The School will receive funding in accordance with the provisions of chapter 28A.710 RCW and associated rules and procedures.

ARTICLE X: AUDITS

Section 10.1 Audits

The School shall comply with all audit obligations imposed by law, but not limited to, audit requirements of the State Auditor's Office, audit requirements for non-profit corporations, and those imposed by the Commission. Within the scope of its responsibilities, the State Auditor's Office may conduct the following types of audits:

- a. Financial;
- b. Accountability;
- c. Federal single;
- d. Special investigation (includes fraud audit); and
- e. Performance.

The School must contract for an independent performance audit of the school to be conducted: (a) The second year immediately following the school's first full school year of operation; and (b) every three years thereafter. The performance audit must be conducted in accordance with the United States general accounting office government auditing standards.

The School shall be financially responsible for all costs associated with the audit(s). The Commission retains the discretion to require audits as it deems appropriate. The School shall provide the Commission with a copy of any audits prepared under this provision by the deadlines imposed by the Commission. Failure to comply with this provision shall be considered a material and substantial violation of the terms of this contract and may be grounds for termination, revocation or other remedy as provided by this agreement.

ARTICLE XI: SCHOOL FACILITIES

Section 11.1 Accessibility

The School facilities shall conform with Applicable Law governing public school facility access.

Section 11.2 Health and Safety

The School facilities shall meet all Applicable Laws governing health, safety, occupancy and fire code requirements and shall be of sufficient size to safely house the anticipated enrollment. Any known change in status or lapse into non-compliance with this provision must be immediately reported to the Commission.

Section 11.3 Location

The School shall provide evidence that it has secured a location that is acceptable to the Commission by March 15, 2020. The school may move its location(s) only after obtaining written approval from the Commission, subject to such terms and conditions as may be specified. Any change in the location of the School shall be consistent with the Application and acceptable to the Commission. Attachment 7: Physical Plant, contains the address and description of the approved facility.

Section 11.4 Construction/Renovation and Maintenance of Facilities

The School will be responsible for the construction/renovation and maintenance of any facilities owned or leased by it (to the extent agreed upon in any such lease). The School will be responsible for ensuring compliance with all accessibility requirements contained in Applicable Law.

Section 11.5 Use of the Facility by the School

The School will use the facility for the sole purpose of operating a public school as authorized by this Contract. The School will not conduct, nor will it permit, any activity that would threaten or endanger the health or safety of occupants, the structural integrity of the facility, or the insurability of the facility, or violate applicable state or federal law. The school shall have a policy regarding the use of the facility by third parties that is submitted to the Commission for approval.

Section 11.6 Inspections

The Commission will have access at all reasonable times and frequency to any facility owned, leased or utilized in any way by the School for purposes of inspection and review of the School's operation and to monitor the School's compliance with the terms of this Contract and all Applicable Law. These inspections may be announced or unannounced as deemed appropriate by the Commission, or its designee, in the fulfillment of its oversight responsibilities.

Section 11.7 Impracticability of Use

If use by the School of a facility is rendered impracticable by any cause whatsoever, or if the funds necessary to construct/renovate or upgrade a facility cannot be secured, the School shall be responsible for securing an alternative facility. The School may move into that facility only after obtaining written approval from the Commission, subject to such terms and conditions as may be specified by the Commission. The Commission shall not be obligated to provide an alternative facility for use by the School.

ARTICLE XII: EMPLOYMENT

Section 12.1 No Employee or Agency Relationship

Neither the School, its employees, agents, nor contractors are employees or agents of the Commission. The Commission or its employees, agents, or contractors are not employees or agents of the School. None of the provisions of this Contract will be construed to create a relationship of agency, representation, joint venture, ownership, or control of employment between the Parties other than that of independent Parties contracting solely for the purpose of effectuating this Contract.

Section 12.2 Retirement Plan

The School's employees shall be members of the State of Washington's public employees' retirement system to the extent authorized by law.

Section 12.3 Teacher Membership in Professional Organizations

Teachers at the School have the right to join, or refrain from joining, any lawful organization for their professional or economic improvement and for the advancement of public education.

Section 12.4 Background Checks

- a.** The School will obtain and retain copies of fingerprint and background checks (record checks) through the Washington state patrol criminal identification system under RCW 43.43.830 through 43.43.834, 10.97.030, and 10.97.050, and through the federal bureau of investigation before hiring an employee or allowing contractors on school premises when the employee, board member, or contractor will have unsupervised access to children. This shall be an ongoing requirement; background checks will be renewed every two years to determine whether conduct has occurred post-employment. If the employee or contractor has had a record check within the previous two years, the school, may rely on the information contained in OSPI's record check data base to satisfy this requirement. When necessary, applicants may be employed on a conditional basis pending completion of the record check(s).
- b.** Each year the School will conduct record checks on volunteers using the Washington Access to Criminal History (WATCH) program before the volunteer is allowed to have unsupervised access to children at the school, or during school sponsored or affiliated events. A copy of the results of the check shall be maintained by the school.
- c.** The School shall give notice to the Commission of any employee it finds who has a prior conviction of a felony, or any crime related to theft or misappropriation of funds, and of any employee who is convicted of a felony during the term of an employee's employment. The School shall also give notice to the Commission of any employee who has been convicted of an offense enumerated or referenced in chapter 28A.410 RCW.
- d.** Employee rosters and proof of background check clearance shall be provided to the Commission as required by the Charter School Performance Framework, chapter 108-30 WAC.

ARTICLE XIII: INSURANCE AND LEGAL LIABILITIES

Section 13.1 Insurance

The School will maintain adequate insurance necessary for the operation of the School, including but not limited to property insurance, general liability insurance, workers' compensation insurance, unemployment compensation insurance, motor vehicle insurance, and errors and omissions insurance covering the Board, School, and its employees with policy limits as set forth below:

- a. Comprehensive general liability: \$3,000,000
- b. Officers, directors and employees errors and omissions: \$50,000
- c. Professional liability insurance: \$1,000,000 per occurrence, plus \$3,000,000 for sexual molestation claims. Coverage must include coverage from claims of sexual molestation and corporal punishment and any sublimits must be approved by the Commission.
- d. Data Breach Insurance: \$1,000,000
- e. Property insurance: As required by landlord or lender
- f. Transportation/Motor vehicle liability (if appropriate): \$3,000,000 per occurrence, which must include coverage for bodily injury and property damage; any sublimits must be approved by the Commission. In addition, collision and comprehensive insurance against physical damage including theft shall be provided with a maximum deductible of \$1,000 for collision and \$1,000 for comprehensive coverage except when the cost of the coverage would exceed the value of the vehicle during the contract period.
- g. Fidelity/Crime Coverage: \$500,000
- h. Workers' compensation: Prior to performing work under this Contract, the School shall provide or purchase industrial insurance coverage for its employees, as may be required of an "employer" as defined in RCW Title 51, and shall maintain full compliance with RCW Title 51 during the course of this Contract.

The Commission shall be named as an additional insured on all of these insurance policies. The Commission may reasonably require the School to adjust the coverage and limits provided for under the terms of any particular contract or policy. The School will pay any deductible amounts attributable to any acts or omissions of the School, its employees, or agents. Failure to maintain insurance coverage in at least the minimum limits required by this contract is grounds for revocation.

Section 13.2 Insurance Certification

The School shall, by August 1st of each year, provide the Commission with proof of insurance as required by state law and Commission policy.

Section 13.3 Risk Management

Within 24 hours of identification of any pending or threatened claims or charges the School will inform the Commission and provide the Commission's counsel and risk manager with all notices of claims. In addition to satisfying its indemnification obligations, the School will cooperate fully with the Commission in the

defense of any claims asserted against the Commission, its board members, agents or employees arising from or related to the operation of the School and comply with the defense and reimbursement provisions of all applicable insurance policies.

Section 13.4 Limitation of Liabilities

In no event will the State of Washington, or its agencies, officers, employees, or agents, including, but not limited to the Commission, be responsible or liable for the debts, acts or omissions of the School, its officers, employees, or agents.

Section 13.5 Faith and/or Credit Contracts with Third Parties

The School shall not have authority to extend the faith and credit of the Commission or the State of Washington to any third party and agrees that it will not attempt or purport to do so. The School acknowledges and agrees that it has no authority to enter into a contract that would bind the Commission and agrees to include a statement to this effect in each contract or purchase order it enters into with third parties.

Section 13.6 Indemnification

To the fullest extent permitted by law, the School shall indemnify, defend and hold harmless the Commission, State, agencies of State and all officials, agents and employees of State, from and against all claims for injuries or death arising out of or resulting from the performance of the contract by the Schools' agents, employees, representatives, or contractors. The School's obligation to indemnify, defend, and hold harmless includes any claim by Schools' agents, employees, representatives, or any contractor or its employees. The School expressly agrees to indemnify, defend, and hold harmless the Commission and State for any claim arising out of or incident to School's or any contractor's performance or failure to perform obligations under the contract. The obligation of indemnification includes all attorney fees, costs and expenses incurred by the Commission and/or State in defense of any suits, actions, grievances, charges and/or proceedings. This obligation shall survive the term of this contract.

ARTICLE XIV: OVERSIGHT AND ACCOUNTABILITY

Section 14.1 School Performance Framework

- a. Annually, the School and Commission must set performance targets designed to help the School meet its mission-specific educational and organizational goals, applicable federal, state, and Commission expectations. Once agreed upon, those performance targets shall be incorporated into the contract through amendment.
- b. The School shall annually Meet Standards or Exceed Standards on the Commission's Charter School Performance Framework set out in chapter 108-30 WAC, the requirements contained in chapter 28A.710 RCW, and as set out in this Contract. The specific terms, form, and requirements of the Performance Framework, including any required indicators, measures, metrics, and targets, are determined by the Commission and will be binding on the School.
- c. The Commission will monitor and periodically report on the School's progress in relation to the indicators, measures, metrics and targets set out in the Performance Framework. Such reporting will take place in accordance with the Commission's Master Calendar and required school data reporting per OSPI rules and policies.
- d. The School's performance in relation to the indicators, measures, metrics and targets set forth in chapter 108-30 WAC, the requirements contained in chapter 28A.710 RCW, and the School specific performance measures set out in this Contract shall provide one basis upon which the Commission will base its decisions to renew, revoke, terminate or take other action on the Contract.
- e. The specific terms, form, and requirements of the Performance Framework may be modified or amended to the extent required to align with changes to applicable state or federal accountability requirements, as set forth in law. In the event that any such modifications or amendments occur, the Commission will use best efforts to apply expectations for school performance in a manner consistent with those set forth in the Performance Framework as initially established in the Contract.
- f. The Commission reserves the right to amend the Charter School Performance Framework set out in chapter 108-30 WAC in accordance with the legal requirements that govern amendment of agency rules. The School will be required to comply with any amendments of the Charter School Performance Framework.

Section 14.2 Performance Audits and Evaluation

Annually, the school shall be subject to an annual review by the Commission or its designee.

Section 14.2.1 Annual Performance Review

The School shall be subject to a review of its academic, organizational, and financial performance at least annually and is required to comply with obligations as indicated in Attachment 9: Identification of Documentation Required for Annual Performance Report.

The School agrees to make all documentation, records, staff, employees, or contractors promptly available to the Commission upon request.

Section 14.2.2 Data and Reports

The School shall promptly provide to the Commission any information, data, documentation, evidence and reports necessary for the Commission to meet its oversight and reporting obligations as outlined in chapter 28A.710 RCW. When the request is for on-site inspection of records, prompt is defined as immediate access. If the request is for reproduction of records, then the Commission will include a timeframe in which the records must be provided; adherence to this timeframe will be considered prompt.

The School shall also provide required documentation, data, information and reports identified in Attachment 9: Identification of Documentation Required for Annual Performance Report by the deadlines identified in the Master Calendar.

The School shall submit all data, worksheets, reports, and other information required by OSPI in accordance with the deadlines imposed by OSPI.

Failure to provide reports, data, documentation, or evidence by the date due is a material violation of the Contract.

Section 14.3 Multiple School Applicant and Operator Oversight.

Once an Applicant is operating more than one school, the Commission may require the Applicant to address identified concerns or deficiencies in all of its Schools without conducting an investigation or inquiry at each School. The revocation of one school's charter shall create a presumption that all other contracts with the Commission shall be revoked. The Applicant bears the burden of rebutting the presumption.

ARTICLE XV: COMMISSION'S RIGHTS AND RESPONSIBILITIES

Section 15.1 Oversight and Enforcement

The Commission will manage, supervise, and enforce this Contract. It will oversee the School's performance under this Contract and hold the School accountable to performance of its obligations as required by federal and state laws and regulations, the Performance Framework, as well as the terms of this Contract. This may include, but is not limited to, taking corrective action, development of corrective action plans, imposing sanctions, renewal, revocation, or termination of this Contract.

Section 15.2 Right to Review

The Commission is a state educational agency with oversight and regulatory authority over the schools that it authorizes as provided by the provisions of chapter 28A.710 RCW. Upon request, the Commission, or its designee, shall have the right to review all records created, established or maintained by the School in accordance with the provisions of this Contract, Commission policies and regulations, or federal and state law and regulations. This right shall be in addition to the Commission's right to require the School to submit data and other information to aid in the Commission's oversight and monitoring of the School as provided under this Contract and governing law. When the request is for on-site inspection of records, the Commission shall be granted immediate access. If the request is for reproduction of records, then the Commission will include a timeframe in which the records must be provided; the School must adhere to this timeframe.

This information, regardless of the form in which it is disclosed, will be used by the Commission, and its authorized representatives, to satisfy its obligations to audit, evaluate, and conduct compliance and enforcement activities relative to the School.

Section 15.3 Inquiries and Investigations

The Commission may conduct or require oversight activities including, but not limited to, inquiries and investigations consistent with chapter 28A.710 RCW, regulations, and the terms of this Contract. The Commission may gather information or evidence from any individual or entity with information or evidence that may be relevant to the inquiry or investigation.

Section 15.4 Notification of Perceived Problems

The Commission will notify the School of perceived problems about unsatisfactory performance or legal compliance within reasonable timeframes considering the scope and severity of the concern. The School will be given reasonable opportunity to respond to and remedy the problem, unless immediate revocation is warranted.

Section 15.5 Other Legal Obligations

Nothing in this Contract will be construed to alter or interfere with the Commission's performance of any obligations imposed under federal or state law.

Section 15.6 Oversight Fee

The Commission shall be paid an authorizer oversight fee in accordance with RCW 28A.710.110 and associated rules adopted by the State Board of Education (SBE).

ARTICLE XVI: BREACH OF CONTRACT, TERMINATION, AND DISSOLUTION

Section 16.1 Breach by the School

Violation of any material provision of this contract may, in the discretion of the Commission, be deemed a breach and be grounds for corrective action up to and including revocation or nonrenewal of this Contract. In making this determination, the Commission will consider the underlying facts and circumstances including, but not limited to, the severity of the violation as well as the frequency of violations and adhere to the applicable procedures contained in chapter 28A.710 RCW, and its rules and procedures. Material provisions include, but are not limited to, provisions imposing a requirement to comply with the Commission rules and policies and all Applicable Laws.

Section 16.2 Termination by the Commission

This Contract may be terminated, after written notice to the School, and the charter revoked by the Commission in accordance with the provisions of chapter 28A.710 RCW and associated rules and policies. In order to minimize the disruption to students, the termination protocol developed pursuant to RCW 28A.710.210 will be followed.

The Commission may terminate the Contract for any of the following reasons:

- a. Any of the grounds provided for under chapter 28A.710 RCW, as it exists now or may be amended;
- b. A material and substantial violation of any of the terms, conditions, standards, or procedures set forth in the Contract;
- c. Failure to meet generally accepted standards of fiscal management and/or school's lack of financial viability;
- d. Failure to provide the Commission with access to information and records;
- e. Substantial violation of any provision of Applicable Law;
- f. Failure to meet the goals, objectives, content standards, performance framework, applicable federal requirements or other terms identified in the Contract;
- g. Bankruptcy, insolvency, or substantial delinquency in payments, of the School;
- h. It is discovered that the Applicant submitted inaccurate, incomplete, or misleading information in its Application or in response to a Commission's request for information or documentation; or
- i. The school's performance falls in the bottom quartile of schools on the State Board of Education's accountability index.

This Contract may also be terminated if the Commission determines that there are insufficient funds available for the operation of the School. Insufficient funds shall include, but not be limited to, reduction in, or elimination of, state allocation of funds. It shall also include depletion of grants or other funding sources to a degree that the Commission determines the School is no longer financially viable. Such termination will be effective on the date identified in the notice, which will be 30 days, or sooner, if the Commission determines that a shorter period is warranted.

Section 16.3 Other Remedies

The Commission may impose other appropriate remedies for breach including, but not limited to, imposing sanctions or corrective action to address apparent deficiencies or noncompliance with legal requirements. These may include a requirement that the School develop and execute a corrective action plan within a specified timeframe. Failure to develop, execute, and/or complete the corrective action plan within the timeframe specified by the Commission will constitute a material and substantial violation of the Contract. This provision shall be implemented in accordance with the chapter 28A.710 RCW and the associated rules and guidance issued by the Commission.

Section 16.4 Termination by the School

Should the School choose to terminate this Contract before the end of the Contract term, it must provide the Commission with notice of the decision immediately after it is made, but no later than ninety days before the closure of the school year. Notice shall be made in writing to the Commission. The School must comply with the Commission's termination protocol.

Section 16.5 Invalid Provisions

If any provision of this Contract or the legal authority for entering into the Contract is invalidated by the decision of any court or competent jurisdiction, the Commission shall determine whether any of the Contract provisions can be given effect in light of the decision and notify the Board of the extent to which the Contract can remain in effect without the invalid provision. If the Commission determines that the decision implicates the legal authority for entering into the Contract, or materially and substantially alters the Contract provisions, the Contract shall terminate on the date that the decision becomes final.

If the legal authority for entering into this Contract is invalidated, then this Contract shall immediately terminate when the Court's order becomes final.

Section 16.6 Termination for Withdrawal of Authority

In the event that the Commission's authority to perform any of its duties is limited in any way, such that it cannot perform its duties or obligations under law and/or this Contract, after the commencement of this Contract and prior to normal completion, the Commission may terminate this Contract, in whole or in part, by seven (7) calendar days (or other appropriate time period) written notice to Applicant. No penalty shall accrue to the Commission in the event this section shall be exercised.

Section 16.7 Termination for Non-Allocation of Funds

If funds are not allocated to continue this Contract in any future period, or it appears that the legislature may not enact a budget before the end of a fiscal year, the Commission may terminate or suspend this Contract by seven (7) calendar days (or other appropriate time period) written notice to the Board. No penalty shall accrue to the Commission in the event this section shall be exercised.

Section 16.8 Termination for Conflict of Interest

Commission may terminate this Contract by written notice to Applicant if it is determined, after due notice and examination, that any party to this Contract has violated the ethics or conflicts of interest provisions of this Contract, or any other laws regarding ethics in public acquisitions and procurement and performance of contracts.

Section 16.9 Dissolution

Upon termination of this Contract for any reason by the School, upon expiration of the Contract, or if the School should cease operations or otherwise dissolve, the Commission may supervise the winding up of the business and other affairs of the School; provided, however, that in doing so the Commission will not be responsible for and will not assume any liability incurred by the School under this Contract. The Board and School personnel shall cooperate fully with the winding up of the affairs of the School. The School's obligations for following a termination protocol and winding up of the affairs of the school shall survive the term of this contract.

Section 16.10 Disposition of Assets upon Termination or Dissolution

All assets, including tangible, intangible, and real property in use by the School but originally owned by the state or assets purchased using at least 25 percent of public funds are the property of the state and shall be returned to the state upon termination or dissolution, in accordance with Commission policy and governing law. School owned assets, including tangible, intangible, and real property, remaining after paying the School's debts and obligations and not requiring return or transfer to donors or grantors, or other disposition in accordance with state law, will be disposed of in accordance with governing state and federal law, including, but not limited to RCW 28A.710.210, and the rules adopted thereto. This provision shall survive the term of this contract.

ARTICLE XVII: MISCELLANEOUS PROVISIONS

Section 17.1 Merger

This Agreement, and all attachments, exhibits, and amendments thereto, contains all the terms and conditions agreed upon by the parties. No other understandings, oral or otherwise, regarding the subject matter of this Contract shall be deemed to exist or to bind any of the Parties hereto.

Section 17.2 Amendments

No amendment to this Contract will be valid unless ratified in writing by the Commission and the Board and executed by authorized representatives of the Parties.

Section 17.3 Governing Law and Enforceability

This Contract shall be construed and interpreted in accordance with the laws of the state of Washington and the venue of any action brought hereunder shall be in the Superior Court for Thurston County.

Section 17.4 Severability

If any provision of this Contract or any application of this Contract to the School is found contrary to law or invalid, such provision or application will have effect only to the extent permitted by law and the invalidity shall not affect the validity of the other terms or conditions of this Agreement.

Section 17.5 No Waiver

The Parties agree that no assent, express or implied, to any breach by either party of any one or more of the provisions of this Contract shall constitute a waiver of any other breach.

Section 17.6 No Third-Party Beneficiary

This Contract shall not create any rights in any third parties who have not entered into this Contract, nor shall any third party be entitled to enforce any rights or obligations that may be possessed by either party to this Contract.

Section 17.7 Non-Assignment

Neither party to this Contract shall assign or attempt to assign any rights, benefits, or obligations accruing to the party under this Contract unless the other party agrees in writing to any such assignment.

Section 17.8 Records Retention

School records shall be maintained in accordance with all applicable state and federal document and record retention requirements. If any litigation, claim, or audit is started before the expiration of an applicable document retention period, the records shall be retained until all litigation, claims, or audit findings involving the records have been resolved. This provision shall survive the term of the contract.

Section 17.9 Confidential Information

- a. The parties recognize that they are both bound by the requirements of the Family Educational Rights and Privacy Act Regulations (FERPA), (20 U.S.C. § 1232g; 34 C.F.R. § 99), and they will safeguard such

information in accordance with the requirements of FERPA. The parties further recognize that that some of the information exchanged under this agreement will be confidential.

b. The term confidential information as used in this Contract means any and all information provide by one party to the other that is exempt from mandatory disclosure under the terms of the state public disclosure laws codified at chapter 42.56 RCW. The term “confidential information” includes, but is not limited to:

1. Any personally identifiable student-related information, including, but not limited to:

- i.** Student names;
- ii.** The name of a student’s parent or other family members;
- iii.** Student addresses;
- iv.** The address of a student’s family;
- v.** Personal identifiers such as a student’s social security number or student number;
- vi.** Personal characteristics that would make a student's identity easily traceable;
- vii.** Any combination of information that would make a student's identity easily traceable;
- viii.** Test results for schools and districts which test fewer than ten students in a grade level; and
- ix.** Any other personally identifiable student-related information or portrayal of student related information in a personally identifiable manner. See, in particular, RCW 42.56.230(1) which exempts personal information in files maintained for students in public schools from mandatory public disclosure; RCW 42.56.070 and 42.56.080 which recognize exemptions from mandatory public disclosure information contained in other statutes such as the federal FERPA and its implementing regulations which prohibit the unauthorized public disclosure and re-disclosure of “personally identifiable student information” in or from student “education records”; and the provisions of this contract.

c. Confidential information disclosed under this agreement will be used solely for legally authorized purposes including, but not limited to, the audit, evaluation of the School and associated compliance and enforcement activities.

d. Only employees of the parties, and legally authorized individuals, will have access to confidential information described in this agreement. Any re-disclosure of personally identifiable information will occur only as authorized under this agreement and 34 C.F.R. § 99.33.

e. Confidential information exchanged under this agreement will be destroyed when the purpose for which the information was required has been completed, and will not be duplicated or re-disclosed without specific authority to do so. Provided, however, that the parties must also comply with all legally imposed document retention requirements and litigation holds.

f. The parties will safeguard confidential information by developing and adhering to policies governing physical, electronic, and managerial safeguards against unauthorized access to and unauthorized disclosure of confidential information.

g. If a party receives a public records request, court order, or subpoena for Student Data, provided under this agreement the party shall, to the extent permitted by law, notify the other party within two (2) business days of its receipt thereof, and will reasonably cooperate with the party in meeting FERPA

obligations in complying with or responding to said public records request, subpoena, and/or court order.

Section 17.10 Order of Precedence

The items listed below are incorporated by reference herein. In the event of an inconsistency in this contract, the inconsistency shall be resolved by giving precedence in the following order:

- a. Applicable Law;
- b. Terms and Conditions of the Contract;
- c. Attachments; and
- d. Any other provisions incorporated by reference or otherwise into the Contract.

Section 17.11 Taxes

The School shall be responsible for adherence to all state and federal tax laws and regulations including, but not limited to, all payments accrued on account of payroll taxes, unemployment contributions, any other taxes, insurance or other expenses for the School's employees, contractors, staff and volunteers which shall be the sole liability of the School.

Section 17.12 Waiver

Waiver of any breach of any term or condition of this Contract shall not be deemed a waiver of any prior or subsequent breach. No term or condition of this Contract shall be held to be waived, modified, or deleted except by a written instrument signed by the parties.

Section 17.13 Captions

The captions and headings used in this Contract are for convenience only and shall not be used in construing the provisions of this Contract.

Section 17.14 Gender and Number

The use of any gender in this Contract shall be deemed to be or include the other genders, including neuter, and the use of the singular shall be deemed to include the plural (and vice versa) wherever applicable.

Section 17.15 New School Application and Response

This Contract is entered into as a result of the approval of the application submitted by the School in response to the Commission's New Schools Application (NSA). The NSA is attached as Attachment 11: New Schools Application to this Contract and the School's application submitted in response to the NSA is attached as Attachment 12: Charter Public School Application to this Contract.

ARTICLE XVIII: NOTICE

Section 18.1 Notice

Any notice required or permitted under this Contract will be in writing and will be effective upon personal delivery, emailing, or three days after mailing when sent by certified mail, postage prepaid, addressed as follows:

Amanda Gardner
506 2nd Ave
Suite 630
Seattle, WA 98104
amanda@catalystpublicschools.org
(360) 453-7085

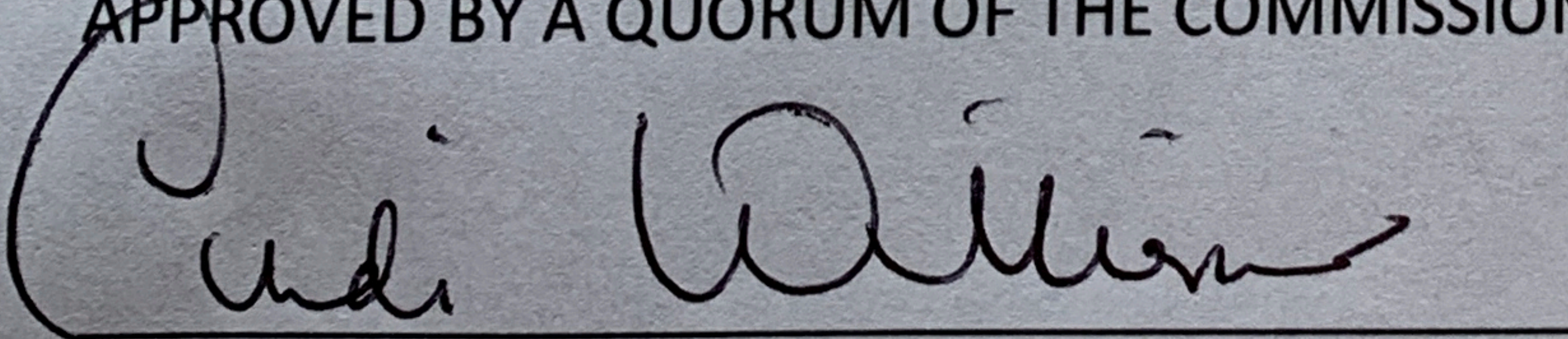
Joshua Halsey
Washington Charter School Commission
PO Box 40996
Olympia, WA 98504-0996
joshua.halsey@k12.wa.us
(360) 725-5511

Any change in address shall be immediately given to the other party in writing. Any notice that is undeliverable due to change of address without proper notification to the other party will be deemed received on the date delivery to the last known address was attempted.

If a notice is received on a weekend or on a national or Washington state holiday, it shall be deemed received on the next regularly scheduled business day.

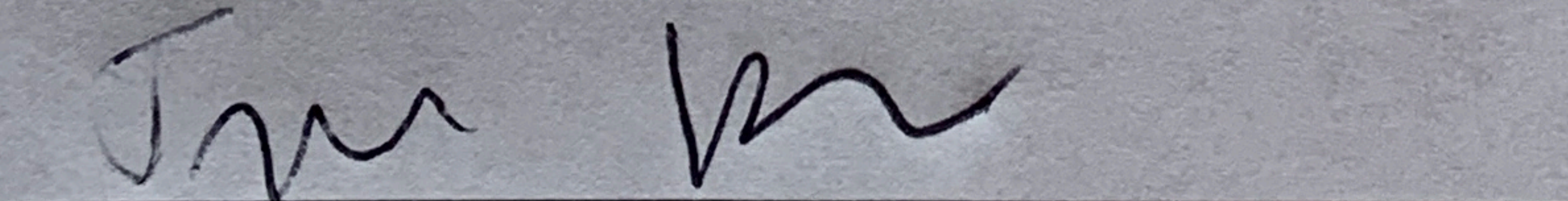
IN WITNESS WHEREOF, the Parties have executed this Contract to be effective August 19, 2020.

APPROVED BY A QUORUM OF THE COMMISSION ON August 22, 2019:



Cindi Williams, Chair
Washington State Charter School Commission

THE CHARTER SCHOOL BOARD:



Julie Kennedy, President
Catalyst Public Schools Charter School Board

APPENDICES

Attachment 1: Pre-Opening Process and Conditions

Attachment 2: Governance Documents

Attachment 3: Board Roster and Disclosures

Attachment 4: Educational Program Terms and Design Elements

Attachment 6: Education Service Provider (ESP) Contract Guidelines

Attachment 7: Physical Plant

Attachment 8: Statement of Assurances

Attachment 9: Identification of Documentation Required for Annual Performance Report

Attachment 10: Enrollment Policy

Attachment 11: Request for Proposals

Attachment 12: Public Charter School Application

Attachment 1: Pre-Opening Process and Conditions

TASK	DUE DATE	STATUS/NOTES	COMPLETE
School Facility/Physical Plant:			
Provide the proposed location of the School; identify any repairs/ renovations that need to be completed by school opening, the cost of these repairs, the source of funding for the repairs, and a timeline for completion.	3/15		
Written, signed copy of facility lease, purchase agreement and/or other facility agreements for primary and ancillary facilities as are necessary for School to operate for one year or more.	3/31		
School possesses appropriate documents that the School is of sufficient size and with a sufficient number of classrooms to serve the projected enrollment. Copies of documents are on file with the Commission.	5/31		
The School facilities have met all applicable Department of Health requirements to serve food. Food Safety Permit is on file with the Commission.	8/1		
The School possesses all permits and licenses required to legally operate in the School Facility. Certificate of Occupancy is on file with the Commission.	8/1		
School Operations:			
Board approved (with signature page and date) special education policies and procedures (2161 and 2161P). In addition, evidence of submission of policies and procedures to OSPI are on file with the Commission.	2/15		
If the School wishes to offer a weighted enrollment preference for at-risk students or to children of full-time employees of the school if the employees' children reside within the state, the admissions policy must be approved by the Commission.	2/15		

The School has written rules regarding pupil conduct, discipline, and rights including, but not limited to short-term suspensions, students with disabilities and a re-engagement plan.	8/1		
The school has provided evidence of a uniform system of double-entry bookkeeping that is consistent with generally accepted accounting principles Generally Accepted Accounting Principles (GAAP).	4/14		
Copy of Employee Handbook and related employee communication which includes at a minimum, expectations for employee performance and behavior, compensation and benefit information, emergency response information, annual calendar, hours and length of employment, supervisory obligations, and a description of both informal and formal complaint procedures that employees may pursue In the event of disagreements.	6/15		
The school has provided evidence of a student handbook. Student Handbook must contain at a minimum the following: School's mission statement, School's Contact Information, School Calendar, School Attendance Policy, Student Discipline Policy and Student Rights and Responsibilities.	6/30		
An annual school calendar approved by the Board of Directors for the first year of the School's operation is on file with the Commission. School calendar must meet the compulsory school attendance requirements of state law, financial guidelines, and state regulations.	6/30		
Provide evidence that students representing 80% of the projected fall membership have enrolled, including name, address, grade and prior school attended.	7/15		
The School has established a process for resolving public complaints, including complaints regarding curriculum. The process includes an opportunity for complainants to be heard. School's process is on file with the Commission.	7/1		

The required Safe School Plan consistent with the school mapping information system pursuant to RCW 28A.320.125; RCW 36.28A.060, is on file with the Commission. For more information on a Safe School Plan, please visit: https://www.k12.wa.us/safetycenter/Planning/Manual.aspx	7/1		
The School, through website posting and written notice with receipt acknowledge by signature of the recipient, must advise families of new, ongoing, and prospective students of any ongoing litigation challenging the constitutionality of charter schools or that may require charter schools to cease operations.	7/1		
PRE-OPENING SITE VISIT Prior to a School opening, Commission staff will conduct a site visit to verify that that school has completed or is on track to complete each pre-opening condition and confirm the School is ready to open.	7/15		
State assessment schedule is on file with the Commission.	7/15		
An employee roster and proof of background check clearance for members of the Charter school board, all staff, and contractors who will have unsupervised access to children is on file with the Commission.	8/1		
The School has written rules regarding pupil conduct, discipline, and rights including, but not limited to short-term suspensions, students with disabilities and a re-engagement plan.	8/1		
The school has policy and procedures for requesting, maintaining, securing and forwarding student records.	8/1		
The school has provided evidence of a working system for the maintenance of a proper audit trail and archiving of grade book/attendance (i.e. attendance logs).	8/1		

The school has provided evidence of an adequate staff configuration to meet the educational program terms outlined in the charter, its legal obligations, and the needs of all enrolled students (% of staff positions filled) and/or a plan for filling open positions.	8/1		
Evidence that instructional staff, employees, and volunteers possess all applicable qualifications as required by state and federal law.	8/1		
The school has provided evidence that the Civil Rights Compliance Coordinator, the Section 504 Coordinator, the Title IX Officer and the Harassment, Intimidation, Bullying (HIB) Compliance Officer, and State Assessment Coordinator have been named and submitted to OSPI and the Commission.	8/1		
Provide evidence that all employees have completed training on child abuse and neglect reporting or has comparable experience.	8/15		
School Governance:			
Within two weeks of contract execution, charter school board members must submit a Personal Financial Affairs Statement to the Public Disclosure Commission. The Commission will confirm that each charter school board members has submitted their Statement with the Public Disclosure Commission.	Within 2 weeks of execution of contract		
Charter school must submit annual board meeting schedule including date, time, and location to Commission and assure the Commission that the meetings are posted on school website.	1/1		
Evidence that membership on the Board of Directors is complete and complies with the school's board bylaws (i.e. board roster with contact information for all board members, identification of officers, and term of service).	3/31		
Resume of each board member is on file with the Commission.	3/31		

Board Disclosure forms are complete and on file with the Commission.	3/31		
For School's whose 501c3 status was pending at the time of submission of the charter school application, the School must submit to the Commission verification of its 501c3 status once it has been approved by the Internal Revenue Service (IRS).	3/31		
Submit emergency contact information for the Chief Executive Officer (CEO) and other members of the management team.	5/31		
Annually, the School and Commission must set performance targets/mission-specific goals designed to help the School meet its mission-specific educational and organizational goals. Once agreed upon, those performance targets shall be incorporated into the charter contract through amendment. These targets must be set by July 1st of each year of the School's operation	7/1		
Budget:			
Submit an unaudited Quarter statement of income and expenses. School is required to use the Commission's Budget and Quarterly report template to satisfy this requirement.	2/15		
Submit an unaudited Quarter statement of income and expenses. School is required to use the Commission's Budget and Quarterly report template to satisfy this requirement.	5/15		
The School has provided evidence of an authorization process that identifies 1) individual(s) authorized to expend School funds and issue checks; 2) safeguards designed to preclude access to funds by unauthorized personnel and/or misappropriation of funds; and 3) individual(s) responsible for review and monitoring of monthly budget reports.	7/1		

A copy of the annual budget (using the Commission budget template) adopted by the School Board is on file with the Commission.	7/10		
*Note: Schools should populate Column L: Details of Tab 8: Yearly Budget of the Commission budget template.			
Submit an unaudited Quarter statement of income and expenses. School is required to use the Commission's Budget and Quarterly report template to satisfy this requirement.	8/15		
Evidence that the School has obtained and maintains insurance in the coverage areas and minimum amounts set forth in the charter contract.	8/1		

Note:

- If a due date falls on a Saturday or a Sunday, the document/report will be due on the next Monday.
- If a due date falls on a holiday, the document/report will be due the next business day.

Attachment 2: Governance Documents

ARTICLES OF INCORPORATION FOR CATALYST PUBLIC SCHOOLS

ARTICLE I NAME

The name of this Corporation is "Catalyst Public Schools".

ARTICLE II DURATION

The period of its duration shall be perpetual.

ARTICLE III PURPOSES

3.01 The Corporation is organized exclusively for charitable, educational and scientific purposes, including, for such purposes, the making of distributions to organizations that qualify as exempt organizations within the meaning of §501(c)(3) of the Internal Revenue Code or corresponding section of any future federal tax code.

3.02 Subject to the foregoing, the purpose of forming this nonprofit Corporation shall be to provide education to students in the State of Washington in any combination of grades ranging from kindergarten through twelve (12).

3.03 The Corporation shall admit and assist any race, color, national and ethnic origin to all the rights, privileges, programs, and activities generally accorded or made available to its general membership. It shall not discriminate on the basis of race, color, national and ethnic origin in administration of its policies.

3.04 The foregoing notwithstanding, the Corporation shall be entitled to serve any other purpose, as determined by its Board of Directors, consistent with the limitations set forth in paragraph 3.01 of this Article.

ARTICLE IV POWERS

4.01 The Corporation shall have all powers conferred on, or not prohibited of, non-profit organizations organized pursuant to Chapter 24.03 of the Revised Code of Washington; provided, however, the Corporation shall have no power or authority to carry on any activity not permitted to be carried on by (1) an organization exempt from federal income tax pursuant to §501(c)(3) of the Internal Revenue Code or corresponding section of any future federal tax code, or (2) an organization, contributions to which are deductible under §170(c)(2) of the said Code.

4.02 No substantial part of the activities of the Corporation shall be the carrying on of propaganda, or otherwise attempting to influence legislation, and the Corporation shall not participate in, nor intervene in (including the publishing or distribution of statements) any political campaign on behalf of or in opposition to any candidate for public office.

ARTICLE V NON-PROFIT CORPORATION

5.01 The Corporation shall be organized and operated as a non-profit, non-stock Corporation pursuant to Chapter 24.03 of the Revised Code of Washington.

5.02 No part of the net earnings of the Corporation shall inure to the benefit of, or be distributable to, its members, trustees, officers, directors, or other private persons, except that the Corporation shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth above.

ARTICLE VI BOARD OF DIRECTORS

6.01 The Corporation shall be managed by its Board of Directors, which shall be no less than five (5) and no greater than nine (9) in number, as determined from time to time by majority vote of the Board of Directors.

6.02 Unless otherwise provided in the Corporation's Bylaws, vacancies on the Board of Directors shall be filled by majority vote of the remaining Board of Directors.

ARTICLE VII INCORPORATOR

The name and address of the incorporators are:

Amanda Gardner
603 Klickitat Place NE
Bainbridge Island, WA 98110

Tatiana Epanchin
12612 Kaligren Road NE
Bainbridge Island, WA 98110

ARTICLE VIII INDEMNIFICATION

The Corporation shall indemnify its officers and directors to the full extent permitted by law.

ARTICLE IX
BYLAWS

The Board of Directors shall adopt, by majority vote, such bylaws as it deems appropriate and as not inconsistent with these Articles, for the internal governance of the Corporation.

ARTICLE X
AMENDMENT

These Articles may be amended by majority vote of the members of the Board of Directors.

ARTICLE XI
DISSOLUTION

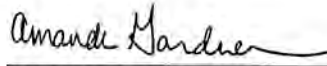
Upon the dissolution of the Corporation, its assets shall be distributed to one or more organizations or entities exempt from taxation pursuant to § 501(c)(3) of the Internal Revenue Code, or corresponding section of any future federal tax code, or shall be distributed to the federal government, or to a state or local government, for a public purpose.

ARTICLE XII
REGISTERED OFFICE AND AGENT

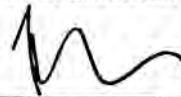
The registered agent and registered office address of the Corporation shall be as follows:

Steven O. Anderson
Stamper Rubens, P.S.
720 W. Boone, Suite 200
Spokane, WA 99201

DATED this 20th day of November, 2018.



AMANDA GARDNER



TATIANA EPANCHIN

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BYLAWS OF CATALYST PUBLIC SCHOOLS

ARTICLE I OFFICES

1.01 Registered Office and Registered Agent. The registered office of the Corporation shall be located in the state of Washington at such place as may be fixed from time to time by the Board of Directors upon filing of such notices as may be required by law. The registered agent shall have a business office identical with such registered office.

ARTICLE II CHARITABLE PURPOSES/NEGATION OF PECUNIARY GAIN

2.01 Charitable purposes. The Corporation is organized exclusively for charitable, scientific, literary, or educational purposes within the meaning of §501(c)(3) of the Internal Revenue Code of 1986, as amended, or corresponding provisions of any subsequent federal tax laws, as designated in the Restated Articles of Incorporation, filed with the Secretary of State on _____, and as amended thereafter.

Notwithstanding any provisions of these Bylaws to the contrary, this Corporation shall not conduct or carry on any activities not permitted to be conducted or carried on by an organization qualified for tax-exempt status under §501(c)(3) of the Internal Revenue Code of 1986, as amended, or corresponding provisions of any subsequent federal tax laws. Furthermore, this Corporation shall neither conduct nor carry on any activities which subject the Corporation to liability for excise taxes imposed pursuant to §§4941, 4942, 4943, 4944, or 4945 of the Internal Revenue Code of 1986, as amended, or corresponding provisions of any subsequent federal tax laws.

The Corporation shall not devote any part of its activities to carrying on propaganda, or otherwise attempting to influence legislation; nor shall the Corporation participate or intervene in any political campaign (including the publishing or distributing of statements) on behalf of any candidate for public office.

2.02 Negation of pecuniary gain. No part of the net earnings of this Corporation shall ever inure to or for the benefit of or be distributable to its directors, officers, or other private persons, except that the Corporation shall be empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the exempt purposes for which it was formed.

ARTICLE III
MEMBERS

3.01 Membership. The Corporation shall have no members.

ARTICLE IV
BOARD OF DIRECTORS

4.01 Number and Powers. The management of all the affairs, property, and interests of the Corporation shall be vested in a Board of Directors. The Board of Directors shall consist of no fewer than five (5) and no more than nine (9) Members. The terms of the directors shall be two (2) year, expiring at the annual meeting following their election, except that at least half of the initial Members of the Board of Directors shall be elected to serve an initial one (1) year terms to ensure that approximately half of the Board is elected in any given year thereafter. At each annual meeting, the directors shall be elected to succeed the directors whose terms expire at such meeting. In addition to the powers and authorities expressly conferred upon it by these Bylaws and Articles of Incorporation, the Board of Directors may exercise all such powers of the Corporation and do all such lawful acts and things as are necessary to carry out the business of the Corporation.

4.02 Term Limits. Directors may serve up to a maximum of five (5) terms or a total of ten (10) years, after which he or she may not be re-elected for one (1) term. Such term limits shall be calculated from the adoption date of these Bylaws forward (i.e., past terms will not be counted in the term limits, whereas any term currently being served as of the adoption date will be counted in the term limits) regardless of how many terms a Director may have served in the past. Notwithstanding the foregoing, in the event the Corporation cannot find a new member to fill the vacant position on the Board of Directors, the remaining members of the Board of Directors may, by unanimous vote, elect to waive the term limits provision for such period.

4.03 Change of Number.

a. The current number of directors serving may at any time be increased or decreased, between five (5) and nine (9) Members, by a majority of the entire Board of Directors, but no decrease shall have the effect of shortening the term of any incumbent director.

b. The number of directors authorized to serve on the Board of Directors under these Bylaws may at any time be increased or decreased by an amendment of these Bylaws, but no decrease shall have the effect of shortening the term of any incumbent director.

4.04 Vacancies. All vacancies in the Board of Directors, whether caused by resignation, death or otherwise, may be filled by the affirmative vote of a majority of the remaining directors. At such time as the Board of Directors may drop below the minimum number of five (5), whether by resignation, death or otherwise, the Board of Directors shall be authorized to carry out business with that reduced number for the maximum period required to fill the vacant position(s). A director elected to fill any vacancy shall hold office for the unexpired term of the predecessor director and until a successor is elected and qualified.

4.05 Regular Meetings. Regular meetings of the Board of Directors may be held at the Corporation's business office or at such other place or places, either within or without the state of Washington, as the Board of Directors may from time to time designate. The annual meeting shall be held each year during the month of December at a date, time and place as the Board of Directors shall designate by written notice. In addition to the annual meeting, there shall be regular meetings of the Board of Directors held, with proper notice, not less frequently than once each calendar quarter. Minutes shall be kept at all meetings of the Board of Directors.

4.06 Special Meetings. Special meetings of the Board of Directors may be called at any time by the President or upon written request by any two directors. Such meetings shall be held at the registered office of the Corporation or at such other place or places as the directors may from time to time designate. When called by written request of any two directors, such directors shall be charged with providing proper notice of the special meeting in accordance with §4.07. Minutes shall be kept of all Special Meetings.

4.07 Notice. Notice of all meetings of the Board of Directors (regular, annual and special) shall be given to each director by seven (7) days prior service of the same by email, letter, or personal delivery. Such notice shall designate the time and place of the meeting, but need not specify the business to be transacted at, nor the purpose of, the meeting.

4.08 Posting Electronic Notice. Notice may be provided to directors by posting the notice on an electronic network and delivering to such directors a separate record of the posting, together with comprehensible instructions regarding how to obtain access to the posting on the electronic network. Notice is effective when it has been posted to an electronic network and a separate record of the posting has been delivered to the recipient as provided by this §4.08.

4.09 Waiver of Notice. Waiver of notice can be made in one of the following two ways:

- a. Attendance of a director at a meeting shall constitute a waiver of notice of such meeting, except where a director attends for the express purpose of objecting to the transaction of any business because the meeting is not lawfully called or convened; or
- b. A waiver of notice signed by the director or directors, whether before or after the time stated for the meeting.

4.10 Quorum. A majority of the Members of the entire Board of Directors shall be necessary and sufficient at all meetings to constitute a quorum for the transaction of business.

4.11 Manner of Acting. The act of the majority of the directors present at a meeting at which there is a quorum shall be the act of the Board of Directors, unless the vote of a greater number is required by these Bylaws, the Articles of Incorporation or applicable Washington law.

4.12 Voting by Electronic Transmission. Votes for successor directors may be cast by electronic transmission, provided that the Corporation has designated an address, location or system to which the ballot may be electronically transmitted.

4.13 Meetings by Telephone. Members of the Board of Directors or any committee designated by the Board of Directors may participate in a meeting of such Board of Directors or committee via conference telephone or similar communications equipment by means of which all persons participating in the meeting can hear each other at the same time. Participation via such equipment shall constitute presence in person at a meeting.

4.14 Registering Dissent. A director who is present at a meeting of the Board of Directors at which action on a corporate matter is taken shall be presumed to have assented to such action unless the director's dissent or abstention shall be entered in the minutes of the meeting, or unless the director shall file a written dissent or abstention to such action with the person acting as the secretary of the meeting before the adjournment thereof, or shall forward such dissent by registered mail to the Secretary of the Corporation immediately after the adjournment of the meeting. Such right to dissent or abstain shall not apply to a director who voted in favor of such action.

4.15 Remuneration. No stated salary shall be paid to directors, as such, for their service, but by resolution of the Board of Directors, a fixed sum and expenses of attendance, if any, may be allowed for attendance at each annual, regular or special meeting of such Board of Directors; provided that nothing herein contained shall be construed to preclude any director from serving the Corporation in any other capacity and receiving compensation therefore. Members of ad hoc or standing committees may be allowed like compensation for attending committee meetings.

4.16 Loans. No loans shall be made by the Corporation to any director.

4.17 Removal. Any director may be removed at any time, with or without cause, by the affirmative vote of two-thirds (2/3) of the whole Board of Directors. Notice stating that a named director shall be considered for removal and the cause, if any, for such removal must be mailed to the director prior to a duly called meeting of the Board of Directors at the same time and in the same manner prescribed for the notice of the meeting.

4.18 Action by Directors without a Meeting. Any action required or permitted to be taken at a meeting of the directors, or of a committee thereof, may be taken without a meeting by a written consent setting forth the action so to be taken, signed by all the directors, or all of the Members of the committee, as the case may be, before such action is taken. Such consent shall have the same effect as a unanimous vote. Any such action may also be ratified after it has been taken, either at a meeting of the directors or by unanimous written consent.

ARTICLE V
OFFICERS

5.01 Designations. The officers of the Corporation may be a President, Vice Presidents, Treasurer, Secretary and Assistant Secretary, and such other officers as the Board of Directors may designate. The Corporation shall have a President and Secretary. All officers shall be elected at the annual meeting for terms of one (1) year by the Board of Directors. Such officers shall hold office until their successors are elected and qualify. Any two or more offices may be held by the same person, except the offices of President and Secretary.

5.02 The President. The President shall preside at all meetings of the Board of Directors, shall perform such other duties as are incident to the office or are properly required of the President by the Board of Directors.

5.03 Vice President. During the absence or disability of the President, the Vice President shall exercise all the functions of the President. The Vice President shall have such powers and discharge such duties as may be assigned to the Vice President from time to time by the Board of Directors.

5.04 Secretary and Assistant Secretary. The Secretary, or his/her designee, shall issue notices for all meetings, except for notices of special meetings of the Board of Directors which are called by the requisite number of directors, such directors being charged with giving proper notice, shall keep minutes of all meetings, shall have charge of the corporate books, shall make such reports and perform such other duties as are incident to the office, or are properly required of the Secretary of the Board of Directors and shall maintain all committee reports.

5.05 Treasurer. The Treasurer, or his/her designee, shall have the custody of all monies and securities of the Corporation and shall keep financial records. The Treasurer, or his/her designee, shall disburse the funds of the Corporation in payment of the just demands against the Corporation or as may be ordered by the Board of Directors (taking proper vouchers for such disbursements) and shall render to the Board of Directors from time to time as may be required, an account of all transactions undertaken as Treasurer and of the financial condition of the Corporation. The Treasurer shall perform such other duties as are incident to the office or are properly required by the Board of Directors. The Treasurer shall provide a monthly report of the financial condition of the Corporation to the Board of Directors.

5.06 Delegation. If any officer of the Corporation is absent or unable to act and no other person is authorized to act in such officer's place by the provisions of these Bylaws, the Board of Directors may from time to time delegate the powers or duties of such officer to any other officer or any director or any person it may select.

5.07 Vacancies. Vacancies in any office arising from any cause may be filled by the Board of Directors at any regular or special meeting of the Board of Directors.

5.08 Other Officers. The Board of Directors may appoint or retain such other officers or agents as it shall deem necessary or expedient, who shall hold their offices for such terms and

shall exercise such powers and perform such duties as shall be determined from time to time by the Board of Directors.

5.09 Loans. No loan shall be made by the Corporation to any officer.

5.10 Term – Removal. The officers of the Corporation shall hold office until their successors are chosen and qualified. Any officer or agent elected or appointed by the Board of Directors may be removed at any time, with or without cause, by the affirmative vote of a majority of the whole Board of Directors, but such removal shall be without prejudice to the contract rights, if any, of the person so removed.

5.11 Bonds. The Board of Directors may, by resolution, require any and all of the officers to provide bonds to the Corporation, with surety or sureties acceptable to the Board of Directors, conditioned for the faithful performance of the duties of their respective offices, and to comply with such other conditions as may from time to time be required by the Board of Directors.

5.12 Salaries. The officers of the Corporation shall receive no salary. However, officers shall be reimbursed for reasonable expenses actually incurred in the performance of their duties. The President may recommend to the Board of Directors the salary of the Executive Director, if any, and the Executive Director shall recommend salaries for other employees, if any, and the Board of Directors shall approve or amend any such recommendations.

5.13 Repayment. Any payments made to a director, officer, or other employee of the Corporation for compensation, salary, bonus, interest, rent, or expense incurred by the party which shall be determined to be unreasonable in whole or in part by the Internal Revenue Service pursuant to §4941(d)(2)(E) of the Internal Revenue Code of 1986, as amended, shall be reimbursed by such director, officer, or employee to the Corporation to the full extent of such determination of unreasonableness. It shall be the duty of the Board of Directors to enforce repayment of each such amount. In lieu of repayment by the director, officer, or employee, subject to the determination of the Board of Directors, amounts may be withheld from future compensation or expense reimbursement payments of the director, officer, or employee, to the extent permitted by law, until the amount owed to the Corporation shall have been recovered.

ARTICLE VI EXECUTIVE DIRECTOR/EX OFFICIO

6.01 Executive Director. The Board of Directors may select an Executive Director who shall be responsible for the administration and conduct of the business and affairs of the Corporation pursuant to guidelines established by the Board of Directors. The Executive Director, if selected, may be compensated for services in that capacity in such amount and manner as the Board of Directors shall determine.

6.02 Board Service. The Executive Director or other designed of the Board of Directors may serve on the Board of Directors in a, Ex-Officio nonvoting capacity at the direction of the Board of Directors.

6.03 Liaison. The Executive Director shall act as a liaison between the Board of Directors and the staff and employees of the Corporation. The Executive Director shall have full exclusive authority with respect to employees of the Corporation, pursuant to any personnel or other policies adopted by the Board of Directors. The Executive Director shall also make salary recommendations for the employees of the Corporation. See §5.20.

6.04 Removal. The Executive Director may be removed at any time, with or without cause, by the affirmative vote of a majority of the whole Board of Directors.

6.05 Loans. No loan shall be made by the Corporation to the Executive Director.

ARTICLE VII COMMITTEES

7.01 Creation. The Board of Directors may appoint, from time to time, standing or ad hoc committees. Such committees may be vested with such powers as the Board of Directors may determine by resolution passed by a majority of the full Board of Directors. Provided that no such committee shall have the authority of the Board of Directors in reference to amending, altering, or repealing these Bylaws; electing, appointing, or removing any Member of any such committee or any director or officer of the Corporation; amending the Articles of Incorporation; adopting a plan of merger or adopting a plan of consolidation with another Corporation; authorizing the sale, lease, or exchange of all or substantially all of the property and assets of the Corporation other than in the ordinary course of business; authorizing the voluntary dissolution of the Corporation or adopting a plan for the distribution of the assets of the Corporation; amending, altering or repealing any resolution of the Board of Directors which by its terms provides that it shall not be amended, altered, or repealed by such committee or such other act(s) as only the Board of Directors may perform under the Corporation's Articles of Incorporation and Bylaws or otherwise under law. All committees so appointed shall keep regular minutes of the transactions of their meetings and shall cause them to be recorded in books kept for that purpose in the office of the Corporation. The designation of any such committee and the delegation of authority thereto, shall not relieve the Board of Directors, or any Board Member of any responsibility imposed by law.

7.02 Standing and Ad Hoc Committees.

a. **Standing Committee.** A committee designated as a Standing Committee shall serve continuously until such time as the Board of Directors dissolves such committee by a majority vote of the full Board of Directors. Standing Committees will be charged with assisting the Board of Directors with the continuous management and operation of the Center.

b. **Ad Hoc Committee.** A committee designated as an Ad Hoc Committee shall serve on a temporary basis for the purpose of assisting the Board of Directors in any particular matter as the Board of Directors may designate and shall be automatically dissolved at the conclusion of the matter for which they were created or upon a majority vote of the full Board of Directors.

7.03 Membership. Membership on Standing or Ad Hoc Committees shall be by appointment of the Board of Directors. Upon formation of a committee, at least one Board Member or officer shall be designated to serve on such committee. The Board Member or officer serving on the committee shall be the liaison between the Board of Directors and the committee. If at any time no Board Member or officer is serving on a committee, such committee shall designate one among its membership to make reports to the Board of Directors at each Board meeting as to the activities, progress, needs and concerns of the committee.

7.04 Duties – Communication with Board of Directors. Committees shall be charged with whatever duties the Board of Directors may designate in accordance with the purposes for which the committee was created. All committees shall have an obligation to ensure that the minutes of committee meetings are kept and regular reporting is made to the Board of Directors.

7.05 Nomination of Board Members. All committees shall have the ability to nominate Members to serve on the Board of Directors. The Board of Directors shall consider the nominations made by committees at each regular election of the Board of Directors. If a vacancy occurs, for whatever reason, with respect to a Board Member who was charged with acting as a committee liaison, the committee upon which that Board Member served shall nominate a replacement from among the committee membership. The Board of Directors shall have full discretion to elect or reject candidates nominated by committees.

7.06 Dissolution. The Board of Directors shall have the ability to dissolve any Standing or Ad Hoc Committee at any time by a majority vote of the full Board of Directors. Ad Hoc Committees may also be automatically dissolved upon completion of the purposes for which they were created. Standing Committees shall serve indefinitely until dissolution by the Board of Directors.

ARTICLE VIII RULES OF PROCEDURE

The rules of procedure at meetings of the Board of Directors and committees of the Board of Directors shall be rules as adopted by the Board of Directors, so far as applicable and when not inconsistent with these Bylaws, the Articles of Incorporation or any further resolution of the Board of Directors.

ARTICLE IX DEPOSITORIES

The monies of the Corporation shall be deposited in the name of the Corporation in such bank or banks or trust company or trust companies as the Board of Directors shall designate, and shall be drawn from such accounts only by check or other order for payment of money signed by such persons, and in such manner, as may be determined by resolution of the Board of Directors.

ARTICLE X NOTICES

Except as may otherwise be required by law, any notice to any director or officer may be delivered personally or by mail or e-mail. If mailed, the notice shall be deemed to have been delivered when deposited in the United States mail, addressed to the addressee at his or her last known address in the records of the Corporation, postage prepaid. If e-mailed, the notice shall be deemed to have been delivered when sent, unless returned by an automated notification of failure to deliver.

ARTICLE XI INDEMNIFICATION OF OFFICERS, DIRECTORS, EMPLOYEES, AND AGENTS

The Corporation shall indemnify its officers, directors, employees, and agents to the greatest extent permitted by law. The Corporation shall have power to purchase and maintain insurance on behalf of any person who is or was a director, officer, employee, or agent of the Corporation or who is or was serving at the request of the Corporation as an officer, employee, or agent of another Corporation, partnership, joint venture, trust, other enterprise, or employee benefit plan, against any liability asserted against such person and incurred by such person in any such capacity or arising out of any status as such, whether or not the Corporation would have the power to indemnify such person against such liability under the provisions of this Article.

ARTICLE XII CONTRACTS AND CONVEYANCES

All contracts, deeds, conveyances, negotiable instruments, and other instruments of like character which have first been approved by the Board of Directors shall be signed by the president or vice president and by the secretary or as otherwise directed by the Board of Directors. No contract of any officer of the Corporation shall be valid without previous authorization or subsequent ratification of the Board of Directors.

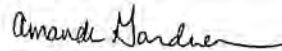
ARTICLE XIII BOOKS AND RECORDS

The Corporation shall keep correct and complete books and records of account and shall keep minutes of the proceedings of its Board of Directors; and shall keep at its registered office or principal place of business, or at the office of its transfer agent or registrar, a record of its directors, giving the names and addresses of all directors.

ARTICLE XIV
AMENDMENTS

A majority of the entire Board of Directors shall have power to make, alter, amend, and repeal the Bylaws of this Corporation.

Adopted by resolution of the Corporation's Board of Directors on 20 November 2018 .

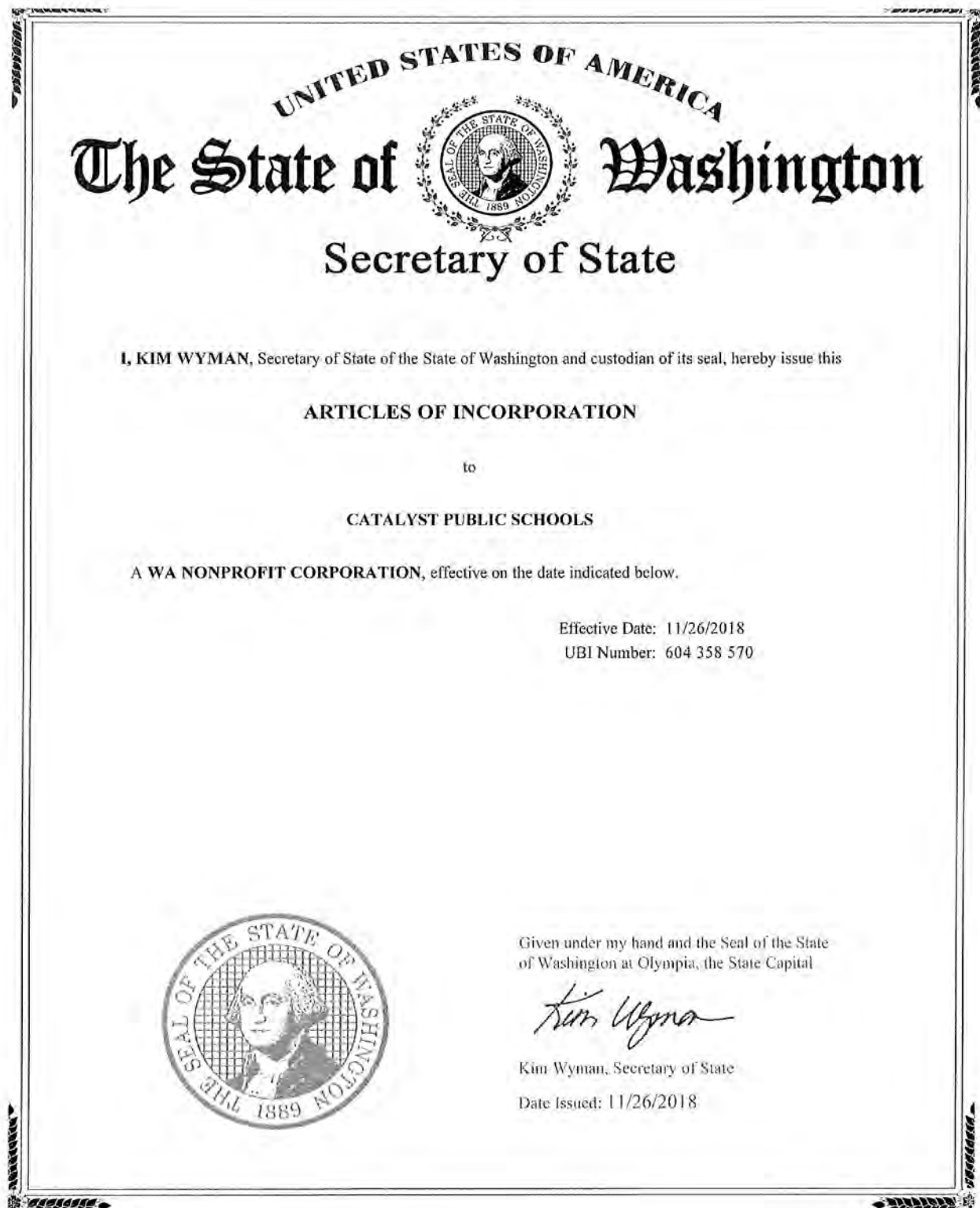


AMANDA GARDNER, President



TATIANA EPANCHIN, Secretary/Treasurer

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 **IRS.gov**

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EIN Assistant

Your Progress: **1. Identity ✓** **2. Authenticate ✓** **3. Addresses ✓** **4. Details ✓** **5. EIN Confirmation**

Congratulations! The EIN has been successfully assigned.

EIN Assigned: **83-2652050**

Legal Name: **CATALYST PUBLIC SCHOOLS**

The confirmation letter will be mailed to the applicant. This letter will be the applicant's official IRS notice and will contain important information regarding the EIN. Allow up to 4 weeks for the letter to arrive by mail.

We strongly recommend you print this page for your records.

Click "Continue" to get additional information about using the new EIN. [Continue >>](#)

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[IRS Privacy Policy](#) | [Accessibility](#)



Filed
Secretary of State
State of Washington
Date Filed: 11/26/2018
Effective Date: 11/26/2018
UBI #: 604 358 570

ARTICLES OF INCORPORATION

UBI NUMBER

UBI Number:
604 358 570

BUSINESS NAME

Business Name
CATALYST PUBLIC SCHOOLS

PURPOSE OF CORPORATION

THE CORPORATION IS ORGANIZED EXCLUSIVELY FOR CHARITABLE, EDUCATIONAL AND SCIENTIFIC PURPOSES, INCLUDING, FOR SUCH PURPOSES, THE MAKING OF DISTRIBUTIONS TO ORGANIZATIONS THAT QUALIFY AS EXEMPT ORGANIZATIONS WITHIN THE MEANING OF 501(C)(3) OF THE INTERNAL REVENUE CODE. SUBJECT TO THE FOREGOING, THE PURPOSE OF FORMING THIS NONPROFIT CORPORATION SHALL BE TO PROVIDE EDUCATION TO STUDENTS IN THE STATE OF WASHINGTON IN ANY COMBINATION OF GRADES RANGING FROM KINDERGARTEN THROUGH TWELVE (12).

PURPOSE OF CORPORATION - STAFF CONSOLE CONFIRMATION

Customer provided purpose of corporation? - Yes

ANY OTHER PROVISIONS

Required by IRS for Tax Exempt Status <https://www.irs.gov/>:

REGISTERED AGENT

Registered Agent Name	Street Address	Mailing Address
STEVEN ANDERSON	720 W BOONE AVE STE 200, SPOKANE, WA, 99201-2560, UNITED STATES	720 W BOONE AVE STE 200, SPOKANE, WA, 99201-2560, UNITED STATES

REGISTERED AGENT CONSENT

Customer provided Registered Agent consent? - Yes

DURATION

This document is a public record. For more information visit www.sos.wa.gov/corps

Work Order #: 2018112400551343 - 1
Received Date: 11/24/2018
Amount Received: \$50.00

Duration:
PERPETUAL

EFFECTIVE DATE

Effective Date:
11/26/2018

INITIAL BOARD OF DIRECTOR

Title	Initial Board of Director Type	Entity Name	First Name	Last Name	Address
INITIAL BOARD OF DIRECTORS	INDIVIDUAL		AMANDA	GARDNER	210 S. HUDSON STREET STE 324, SEATTLE, WA, 98134, UNITED STATES
INITIAL BOARD OF DIRECTORS	INDIVIDUAL		TATIANA	EPANCHIN	210 S HUDSON STREET STE 324, SEATTLE, WA, 98134, UNITED STATES
INITIAL BOARD OF DIRECTORS	INDIVIDUAL		TYKERA	WILLIAMS	210 S. HUDSON STREET STE 324, SEATTLE, WA, 98134, UNITED STATES
INITIAL BOARD OF DIRECTORS	INDIVIDUAL		JULIE	KENNEDY	210 S. HUDSON STREET STE 324, SEATTLE, WA, 98134, UNITED STATES
INITIAL BOARD OF DIRECTORS	INDIVIDUAL		AMY	KLYOTA	210 S. HUDSON STREET STE 324, SEATTLE, WA, 98134, UNITED STATES
INITIAL BOARD OF DIRECTORS	INDIVIDUAL		KATIE	NESMITH-SINGH	210 S. HUDSON STREET STE 324, SEATTLE, WA, 98134, UNITED STATES

INCORPORATOR

Title	Incorporator Type	Entity Name	First Name	Last Name	Address
INCORPORATOR	INDIVIDUAL		AMANDA	GARDNER	210 S HUDSON ST STE 324, SEATTLE, WA, 98134-2417, UNITED STATES

DISTRIBUTION OF ASSETS

DISTRIBUTION OF ASSETS:

UPON THE DISSOLUTION OF THE CORPORATION, ITS ASSETS SHALL BE DISTRIBUTED TO ONE OR MORE ORGANIZATIONS OR ENTITIES EXEMPT FROM TAXATION PURSUANT TO 501(C)(3) OF THE INTERNAL REVENUE CODE, OR CORRESPONDING SECTION OF ANY FUTURE FEDERAL TAX CODE, OR SHALL BE DISTRIBUTED TO THE FEDERAL GOVERNMENT, OR TO A STATE OR LOCAL GOVERNMENT, FOR A PUBLIC PURPOSE.

DISTRIBUTION OF ASSETS PROVIDED

Customer provided information on distribution of assets? - **Yes**

This document is a public record. For more information visit www.sos.wa.gov/corps

Work Order #: 2018112400551343 - 1
Received Date: 11/24/2018
Amount Received: \$50.00

RETURN ADDRESS FOR THIS FILING

Attention:

STEVEN ANDERSON

Email:

SANDERSON@STAMPERLAW.COM

Address:

720 W BOONE AVE STE 200, SPOKANE, WA, 99201-2560, UNITED STATES

UPLOAD ADDITIONAL DOCUMENTS

Name	Document Type
No Value Found.	

UPLOADED DOCUMENTS

Document Type	Source	Created By	Created Date
No Value Found.			

EMAIL OPT-IN

☐ I hereby opt into receiving all notifications from the Secretary of State for this entity via email only. I acknowledge that I will no longer receive paper notifications.

AUTHORIZED PERSON - STAFF CONSOLE

☒ Document is signed.

Person Type:

INDIVIDUAL

First Name:

STEVEN

Last Name:

ANDERSON

Title:

This document is a public record. For more information visit www.sos.wa.gov/corps

Work Order #: 2018112400551343 - 1
Received Date: 11/24/2018
Amount Received: \$50.00



Congratulations:

You have completed the initial filing to create a new business entity. **The next step in opening your new business is to complete a Business License Application.** You may have completed this step already. The Business License Application can be completed online or downloaded at:
<http://www.hls.dor.wa.gov/>

If you have any questions about the Business License Application, or would like a Business License Application package mailed to you, please call Business License Services at 1-800-451-7985.

STEVEN ANDERSON
720 W BOONE AVE STE 200
SPOKANE WA 99201-2560

James M. Dolliver Building
801 Capitol Way South • PO Box 40234
Olympia, WA 98504-0234
Tel: 360.725.0377
www.sos.wa.gov/corps

IMPORTANT

You have completed the initial filing to create a new entity. To keep your filing status active and avoid administrative dissolution, you must:

1. **File an Annual Report** and pay the annual license fee each year before the anniversary of the filing date for the entity. A notice to file your annual report will be sent to your registered agent. It is the corporation or LLC's responsibility to file the report even if no notice is received.
2. **Maintain a Registered Agent** and registered office in this state. You must notify the Corporations Division if there are any changes in your registered agent, agent's address, or registered office address. Failure to notify the Corporations Division of changes will result in misrouted mail, and possibly administrative dissolution.

If you have questions about report and registered agent requirements, please contact the Corporations Division at 360-725-0377 or visit our website at:
www.sos.wa.gov/corps.

Attachment 3: Board Roster and Disclosures

Board Roster						
Board Position	Full Name	Address	Phone	Email	Term Start	Term End
Board Chair	Julie Kennedy	117 NW 82 nd Street Seattle, WA. 98117	917-617-2724	Julie.trott@gmail.com	2019	2021
Board Member	Amy Kiyota	4824 Kenny Street, Seattle, WA 98112	443-934-8705	Amy.kiyota@gmail.com	2019	2020
Board Member	TyKera Williams	3945 NW Fairway Lane, Bremerton, WA 98312	410-463-9857	Willi272@seattleu.edu	2019	2020
Board Member	Katie Singh	3908 Briarcliff Lane West, Seattle, WA. 98199	415-722-1434	Katiesingh10@gmail.com	2019	2021
Board Member	Shaylynn Houston	805 High Ave, Bremerton, WA 98337	404-723-8017	Shaylynn.houston@yahoo.com	2019	2021

**Public Charter School
Board Member Disclosure Form**

Note: The purpose of this document is to provide disclosure. The Public Charter School ('the School') Board operates according to its own bylaws and applicable law in regard to conflicts of interest. This form is a public document and will be available at the School for inspection by other board members, the staff, or the community. In addition, a copy of the form will be sent to the Commission.

Background

1. Full legal name:

2. I affirm that I am at least 18 years of age by the date of appointment to the Public Charter School Board.

☐ Yes, I affirm.

3. Indicate whether you have ever been convicted or pled "no contest" of one or more of the following:

a. a misdemeanor related to honesty or trustworthiness, or

b. a felony.

☐ Does not apply to me.

☐ Yes

If the answer to this question is yes, please provide details of the offense, the date, disposition, etc., in the space below.

4. Indicate if you have ever entered into a settlement agreement, consent decree, adjournment in contemplation of dismissal, assurance of discontinuance or other, similar agreement with the Securities Exchange Commission, Internal Revenue Service, the U.S. attorney general or the attorney general of any state, a U.S. or Commission attorney or any other law enforcement or regulatory body concerning the discharge of your duties as a board member of a for-profit or non-for profit entity or as an executive of such entity. If the answer to this question is yes, please provide details of the agreement.

☐ Does not apply to me.

☐ Yes

Board Member Disclosure Form (continued)

Conflicts

1. Indicate whether you, your spouse, or anyone in your immediate family meets either of the following conditions:

- ☐ is doing or plans to do business with the School (whether as an individual or as a director, officer, employee or agent of any entity).
- ☐ any entity in which one of the above-identified individuals has an interest is doing business or plans to do business with the School.

If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the School.

- ☐ I/we do not know of any such persons.
- ☐ Yes

2. Indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the School or a contractor who is conducting business with the School. If so, please indicate the precise nature of the business that is being or will be conducted.

- ☐ I/we do not anticipate conducting any such business.
- ☐ Yes

Indicate any potential ethical or legal conflicts of interest that would (or are likely to) exist for you as a member of the School Board or another School or non-profit board. [Note that being a parent of a School student, serving on another Contract School's board or being employed by the School are conflicts for certain issues that should be disclosed.]

- ☐ None
- ☐ Yes. If yes, please provide additional information.

Disclosures for Schools Contracting with an Educational Service Provider

1. Indicate whether you, your spouse, or any immediate family member knows (i.e., beyond a casual or professional acquaintance) any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, describe any such relationship.

- ☐ I/we do not know of any such persons.
 - ☐ Yes
-

Board Member Disclosure Form (continued)

Conflicts for Schools Contracting with an Educational Service Provider

1. Indicate whether you, your spouse or other immediate family members have, anticipate in the future, or have been offered a direct or indirect ownership, employment, contractual or management interest in the provider. For any interested indicated, please provide a detailed description.

- I/we have no such interest.
- Yes

2. Indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.

- ☐ I/we do not anticipate conducting any such business.
- ☐ Yes

Other

I affirm that I have read the Contract school's bylaws and conflict of interest policies.

I, _____, certify to the best of my knowledge and ability that the information I am providing to the Washington Charter School Commission in regard to my application to serve as a member of the board of directors of the XX Charter Public School is true and correct in every respect.

Signature

Date

Attachment 4: Educational Program Terms and Design Elements

School Name:	Catalyst: Bremerton
Mission:	Catalyst: Bremerton supports our diverse scholars to live full lives and to succeed in college, career, and life. Scholars will find their purpose and passion so that they can cultivate the critical hope, optimism, and leadership essential to be catalysts in their community and world.
Vision:	Catalyst: Bremerton's graduates build a strong understanding of themselves, envision the world in which they want to live, and develop the agency to access the future of their dreams.
Objectives:	
Goals:	<ul style="list-style-type: none"> • Catalyst will attract and retain diverse, mission-aligned, high-quality staff who will remain at the school for three or more years. • Catalyst will build an effective board where 80% of membership fulfill their terms and/or renew memberships, and where at least 50% identify as people of color and/or are from Bremerton or Kitsap County. • Catalyst will ensure the academic growth and performance of its scholars and will perform within the top tier of the Washington School Improvement Framework.
Education Program Term #1:	<p>Diversity, Equity, and Inclusion (DEI) Framework of Practice</p> <p>To create world-class schools that ensure all students thrive, regardless of background, culturally responsive practices related to diversity, equity, and inclusion (DEI) must be at the heart of all we do. Marrying neuroscience research with culturally relevant teaching practices is a key lever for eliminating opportunity gaps, especially for traditionally marginalized youth.</p> <p>Our organizational framework specifies our commitments to and intentional practices of:</p> <ul style="list-style-type: none"> • Diversity, because we know that it is vital to honor and value the varied and unique lived experiences of our scholars and families. Our scholars must learn to work and build relationships across lines of difference to envision and build a better future for all. • Equity, because we know that equal opportunity is not adequate to ensure the success of all of our scholars. • Inclusion, because the extent to which scholars experience connection to school is a leading predictor of academic achievement and success in life. <p>Observable Indicators</p> <ol style="list-style-type: none"> 1. DEI Playbook: Catalyst and community co-create an organization-wide DEI playbook. This living document includes common language and working definitions of key terms related to DEI and outlines common practices to ensure that culturally relevant practices are the norm. The playbook: <ol style="list-style-type: none"> a. Describes what DEI looks like in action throughout our school;

	<ul style="list-style-type: none"> b. Delineates our commitments to maintaining a culture of DEI in our work; and c. Explains our approach to developing our staff as related to DEI. <p>2. DEI Working Group: This volunteer group comprised of Catalyst staff and parents convenes regularly to assess progress relative to our framework and action plan and provides feedback and suggestions for improvement for the organization.</p>
<p>Education Program Term #2:</p>	<p>Data-Driven Instruction and Dynamic Supports</p> <p>A one-size-fits-all approach to education is both antiquated and one of the practices that leaves behind many scholars, especially those from traditionally marginalized groups.</p> <p>At Catalyst, scholar learning is personalized so scholars receive support where and when they need it. Scholars move into, through, and out of academic and emotional supports as they are ready, based upon data. These types of supports are known to be effective in serving all scholars, especially those from traditionally marginalized groups, and have been found to be one of the most influential practices used to create high-performing schools.</p> <p>Observable Indicators</p> <ol style="list-style-type: none"> 1. Flexible, data-driven, small-group academic rotations: Catalyst elementary classrooms are cotaught, ensuring smaller ratios between adults and scholars. Our staff takes advantage of the lower student to teacher ratio to work in small-group rotation stations with scholars. 2. Targeted learning time (TLT): Each week, scholars have a dedicated block of TLT. In the elementary grades, TLT will be a blend of small-group interventions and blended, personalized learning. By middle school, TLT provides scholars with approximately four focus blocks per week during which scholars receive interventions to foster scholar agency and independence.
<p>Education Program Term #3:</p>	<p>Transformational Leadership Development</p> <p>Social-emotional learning (SEL) programs often focus on cultivating non-academic competencies such as grit and perseverance. While this work is well-intended, many SEL programs have marginal impact because they fail to support scholars in developing many of the foundational beliefs and mindsets needed to see themselves as confident, independent thinkers.</p> <p>Thus, the Catalyst model blends the science of hope with best practices around positive youth development to ensure that our scholars thrive.</p> <ol style="list-style-type: none"> 1. The Science of Hope, Optimism, and Purpose: Individuals who have a strong sense of hope find more success in life. Hope has been found to be the most predictive factor of one's ability to flourish and is a better predictor of

	<p>performance in college and law school than ACT or SAT scores. Scholars with strong hope scores often have higher daily attendance in school and have higher college-going rates. Research suggests that supporting individuals to find their purpose in life, and to live lives aligned to that purpose, is correlated to more fulfilled and longer lives. Scholars at Catalyst are supported to explore and identify their passion and purpose and how to align their actions to their purpose over time.</p> <ol style="list-style-type: none"> 2. Positive Youth Development: Factors for young-adult success include developing agency, an integrated identity, and key competencies needed to navigate a successful life. When schools only focus on competency development they fail to ensure that all students, especially those most traditionally marginalized, receive the supports they need. Therefore, scholars at Catalyst are supported to understand themselves deeply. As they mature, they see and interact across lines of difference to develop the competencies needed to be independent. 3. Critical consciousness development (CCD) and Leadership: Once scholars have mastered the above, they are supported to look outside of their self-interest to explore acting in alignment with their purpose and passion. CCD fosters scholars' ability to understand, navigate, and challenge oppressive social forces facing one's life and community. Development of scholars' critical consciousness is a positive indicator of academic achievement and improved health outcomes, especially for youth who have been traditionally marginalized. <p>Observable Indicators</p> <ol style="list-style-type: none"> 1. Each week, K-5 students have a class dedicated to ensuring they develop a strong sense of self and others. Scholars explore who they are across multiple elements of their identity and investigate how they fit into the world around them. They learn about the science of hope and how we can strengthen the belief that not only can tomorrow be a better day, but that each of us has the agency and power to make it so. 2. By middle school this course morphs into a class on identity and social justice, where scholars develop critical consciousness and act to make positive change in our school and our broader community. The school leverages structures such as Achievement First's scholar-led Dream Teams and Passion Projects to ensure that scholars are deeply engaged in the school and community.
<p>Education Program Term #4:</p>	<p>World Class Staff Development</p> <p>Great teachers are developed, not born. The strongest school-related factor of student achievement is the quality of the teacher in each and every classroom. Similarly, frequent teacher feedback and the use of data to drive instruction are two of the most impactful practices implemented in high-performing schools.</p>

	<p>Catalyst provides world-class professional development to all staff. This effort begins with attracting and retaining a diverse, committed and entrepreneurial instructional staff. We have a sophisticated approach to onboarding our teachers to ensure that every adult on campus is familiar with all elements of our instructional model, and that each faculty member is supported to become a content knowledge expert.</p> <p>Observable Indicators</p> <ol style="list-style-type: none"> 1. Professional Growth Plans (PGP): Each staff member at Catalyst has a PGP with performance goals that are targeted to their unique needs. 2. Frequent Observations and Feedback: Staff members have coaching plans aligned to our vision for instructional excellence, school culture, data-driven instruction, and our DEI framework. Teachers are observed and participate in 1:1 coaching conversation with a school leader at least twice per month. We utilize Relay GSE's <i>See It Name It Do It</i> framework. 3. Varied Growth Strategies: Live coaching, regular data meetings, and practice-based professional development ensure that each of our staff members grows over time. Professional development for staff takes place in whole-group, small-group, and individual settings and includes seeing a model; naming a clear, bite-sized action step; and engaging in deep, authentic practice. This work allows us to create a culture of continuous improvement so that we can adapt and change over time.
Geographic Area Served:	Kitsap County
Location:	TBD
Grades Served 2018-2019:	K, 1, 5, 6
Grades Served at Capacity:	K-8
Projected Enrollment 2018-2019:	224
Projected Enrollment at Capacity:	504
Virtual Program or Online Provider:	N/A
Educational Service Provider:	N/A

Note: The Education Terms are different from *school-specific measures* that you may develop as a part of your Academic Performance Framework because they focus on *process* rather than student *outcomes*. In

other words, the school-specific academic performance measures focus on what students will *achieve*. By contrast, the Education Terms should capture the essentials of what students will *experience*.

Attachment 5: Conflict of Interest Policy

CONFLICT OF INTEREST POLICY AND CODE OF ETHICS

CATALYST PUBLIC SCHOOLS CONFLICT OF INTEREST POLICY

ARTICLE 1. PURPOSE

The purpose of the conflict of interest policy is to protect the interests of Catalyst Public Schools when it is contemplating entering into a transaction or arrangement that might benefit the private interest of an officer or director of Catalyst Public Schools or might result in a possible excess benefit transaction. This policy is intended to supplement but not replace any applicable state and federal laws governing conflict of interest applicable to nonprofit and charitable organizations.

ARTICLE 2. DEFINITIONS

1. Interested Person

Any director, principal officer, or member of a committee with governing board delegated powers, who has a direct or indirect financial interest, as defined below, is an interested person.

2. Financial Interest

A person has a financial interest if the person has, directly or indirectly, through business, investment, or family:

- a. An ownership or investment interest in any entity with which Catalyst Public Schools has a transaction or arrangement,
- b. A compensation arrangement with Catalyst Public Schools or with any entity or individual with which Catalyst Public Schools has a transaction or arrangement, or
- c. A potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which Catalyst Public Schools is negotiating a transaction or arrangement.

Compensation includes direct and indirect remuneration as well as gifts or favors that are not insubstantial. A financial interest is not necessarily a conflict of interest. Under Article 3, Section 2, a person who has a financial interest may have a conflict of interest only if the appropriate governing board or committee decides that a conflict of interest exists.

ARTICLE 3 PROCEDURES

1. Duty to Disclose

In connection with any actual or possible conflict of interest, an interested person must disclose the existence of the financial interest and be given the opportunity to disclose all material facts to the directors and members of committees with governing board delegated powers considering the proposed transaction or arrangement.

2. Determining Whether a Conflict of Interest Exists

After disclosure of the financial interest and all material facts, and after any discussion with the interested person, he or she shall leave the governing board or committee meeting while the determination of a conflict of interest is discussed and voted upon. The remaining board or committee members shall decide if a conflict of interest exists.

3. Procedures for Addressing the Conflict of Interest

a. An interested person may make a presentation at the governing board or committee meeting, but after the presentation, he or she shall leave the meeting during the discussion of, and the vote on, the transaction or arrangement involving the possible conflict of interest.

b. The chair of the governing board or committee shall, if appropriate, appoint a disinterested person or committee to investigate alternatives to the proposed transaction or arrangement.

c. After exercising due diligence, the governing board or committee shall determine whether Catalyst Public Schools can obtain with reasonable efforts a more advantageous transaction or arrangement from a person or entity that would not give rise to a conflict of interest.

d. The governing board or committee shall determine by a majority vote of the disinterested directors whether the transaction or arrangement is in Catalyst Public Schools' best interest, for its own benefit, and whether it is fair and reasonable. In conformity with the above determination, it shall make its decision as to whether to enter into the transaction or arrangement.

4. Violations of the Conflict of Interest Policy

a. If the governing board or committee has reasonable cause to believe a member has failed to disclose actual or possible conflict of interest, it shall inform the member of the basis for such belief and afford the member an opportunity to explain the alleged failure to disclose.

b. If, after hearing the member's response and after making further investigation as warranted by the circumstances, the governing board or committee determines the member has failed to disclose an actual or possible conflict of interest, it shall take appropriate disciplinary and corrective action.

ARTICLE 4. RECORDS OF PROCEEDINGS

The minutes of the governing board and all committees with board delegated powers shall contain:

- a. The names of the persons who disclosed or otherwise were found to have a financial interest in connection with an actual or possible conflict of interest, the nature of the financial interest any action taken to determine whether a conflict of interest was present, and the governing board's or committee's decision as to whether a conflict of interest in fact existed.
- b. The names of the persons who were present for discussions and votes relating to the transaction or arrangement, the content of the discussion, including any alternatives to the proposed transaction or arrangement, and a record of any votes taken in connection with the proceedings.

ARTICLE 5. COMPENSATION

- a. A voting member of the governing board who receives compensation, directly or indirectly, from Catalyst Public Schools for services is precluded from voting on matters pertaining to that member's compensation.
- b. A voting member of any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from Catalyst Public Schools for services is precluded from voting on matters pertaining to that member's compensation.
- c. No voting member of the governing board or any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from Catalyst Public Schools, either individually or collectively, is prohibited from providing information to any committee regarding compensation.

ARTICLE 6. PERIODIC STATEMENTS

Each director and officer shall periodically sign a statement that affirms such person:

- a. Has received the conflict of the interest policy,
- b. Has read and understands the policy,
- c. Has agreed to comply with the policy, and
- d. Understands that Catalyst Public Schools is a charitable organization and in order to maintain its federal tax exemption it must engage primarily in activities which accomplish one or more of its tax-exempt purposes.

CATALYST PUBLIC SCHOOLS CONFLICT OF INTEREST POLICY CERTIFICATION

The undersigned hereby acknowledges that the undersigned:

- (a) Has received a copy of the conflict of interest policy,
- (b) Has read and understands the conflict of interest policy,
- (c) Has agreed to comply with the conflict of interest policy, and
- (d) Understands that in order for Catalyst Public Schools to maintain its federal tax exemption as a charitable organization, it must engage primarily in activities that accomplish one or more of its tax-exempt purposes.

Please check one of the following boxes:

- ☐ I have no conflicts or potential conflicts to disclose.
- ☐ I have the following conflicts or potential conflicts to disclose (please describe):

Dated: _____

Print Name:

Title:

Signature: _____

CATALYST PUBLIC SCHOOLS CODE OF ETHICS POLICY

1. Personal and Professional Integrity

Catalyst Public Schools (the "School") is a workplace where all staff and board members of the School act with honesty, integrity, and openness in all their dealings as representatives of the School. The School promotes a working environment that values respect, fairness, and integrity.

2. Mission

The School has a clearly stated mission and purpose, that is approved by the board of directors, in pursuit of the public good. The School's mission is to foster the social and emotional development, safety and well-being of children through education. All of its programs support that mission, and all of those who work for or on behalf of the School should understand and be loyal to that mission and purpose. The mission is responsive to the constituency and communities served by the School and is of value to the society at large.

3. Governance

The School has an active governing body that is responsible for setting the mission and strategic direction of the School and overseeing the finances, operation, and policies of the School.

The governing body:

- Ensures that its board members have the requisite skills and experience to carry out their duties and that all board members understand and fulfill their governance duties and are acting for the benefit of the School and its public purpose;
- Has a conflict of interest policy that ensures that any conflicts of interest or the appearance thereof are avoided or appropriately managed through disclosure, recusal, or other means;
- Is responsible for the hiring, firing, and regular review of the performance of its top level employee and ensures that the compensation of the top level employee is reasonable and appropriate;
- Ensures that its employees provide the governing body with timely and comprehensive information so that the governing body can effectively carry out its duties;
- Ensures that the School conducts all transactions and dealings with integrity and honesty;
- Ensures that the School promotes working relationships with board members, staff, and program beneficiaries that are based on mutual respect, fairness and openness;
- Ensures that the School is fair and inclusive in its hiring and promotion policies and practices for all board and staff positions;
- Ensures that policies of the School are in writing, clearly articulated, and officially adopted;
- Ensures that the resources of the School are responsibly and prudently managed; and
- Ensures that the School has the capacity to carry out its programs effectively.

4. Legal Compliance

The School strives to be knowledgeable of and comply with applicable laws and regulations.

5. Responsible Stewardship

The School manages its funds responsibly and prudently. This should include the following considerations:

- The School should spend a reasonable percentage of its annual budget on programs that enable it to pursue its mission;
- The School should spend an adequate amount on administrative expenses to ensure effective accounting systems, internal controls, competent staff, and other expenditures critical to professional management;
- The School should compensate staff, and any others who may receive compensation, reasonably and appropriately;
- The School should ensure that all spending practices and policies are fair, reasonable, and appropriate to fulfill the mission of the School; and
- All financial reports should be factually accurate and complete in all material respects.

Attachment 6: Education Service Provider (ESP) Contract Guidelines

1. The maximum term of an ESP agreement must not exceed the term of the Contract. After the second year that the ESP agreement has been in effect, the school must have the option of terminating the contract without cause or a financial penalty.
2. ESP agreements must be negotiated at 'arms-length.' The Contract school's board and ESP must have independent legal counsel to represent their interests in reaching a mutually acceptable management agreement.
3. No provision of the ESP agreement shall interfere with the Contract school board's duty to exercise its statutory, contractual and fiduciary responsibilities governing the operation of the Contract school. No provision of the ESP agreement shall prohibit the Contract school board from acting as an independent, self-governing public body, or allow decisions to be made other than in compliance with the Washington Sunshine Law.
4. An ESP agreement shall not restrict the Contract school board from waiving its governmental immunity or require a Contract school board to assert, waive or not waive its governmental immunity.
5. No provision of an ESP agreement shall alter the Contract school board's treasurer's legal obligation to direct that the deposit of all funds received by the Contract school be placed in the Contract school's account.
6. ESP agreements must contain at least one of the following methods for paying fees or expenses: 1) the Contract school board may pay or reimburse the ESP for approved fees or expenses upon properly presented documentation and approval by the Contract board; or 2) the Contract board may advance funds to the ESP for the fees or expenses associated with the Contract school's operation provided that documentation for the fees and expenses are provided for Contract school board ratification.
7. ESP agreements shall provide that the financial, educational and student records pertaining to the Contract school are Contract school property and that such records are subject to the provisions of the Washington Open Records Act. All Contract school records shall be physically or electronically available, upon request, at the Contract school's physical facilities. Except as permitted under the Contract and applicable law, no ESP agreement shall restrict the Commission's access to the Contract school's records.
8. ESP agreements must contain a provision that all finance and other records of the ESP related to the Contract school will be made available to the Contract school's independent auditor.
9. The ESP agreement must not permit the ESP to select and retain the independent auditor for the Contract school.
10. If an ESP purchases equipment, materials and supplies on behalf of or as the agent of the Contract school, the ESP agreement shall provide that such equipment, materials and supplies shall be and remain the property of the Contract school.

11. ESP agreements shall contain a provision that if the ESP procures equipment, materials and supplies at the request of or on behalf of the Contract school, the ESP shall not include any added fees or charges with the cost of equipment, materials and supplies purchased from third parties.

12. ESP agreements must contain a provision that clearly allocates the respective proprietary rights of the Contract school board and the ESP to curriculum or educational materials. At a minimum, ESP agreements shall provide that the Contract school owns all proprietary rights to curriculum or educational materials that (i) are both directly developed and paid for by the Contract school; or (ii) were developed by the ESP at the direction of the Contract school governing board with Contract school funds dedicated for the specific purpose of developing such curriculum or materials. ESP agreements may also include a provision that restricts the Contract school's proprietary rights over curriculum or educational materials that are developed by the ESP from funds from the Contract school or that are not otherwise dedicated for the specific purpose of developing Contract school curriculum or educational materials. All ESP agreements shall recognize that the ESP's educational materials and teaching techniques used by the Contract school are subject to state disclosure laws and the Open Records Act.

13. ESP agreements involving employees must be clear about which persons or positions are employees of the ESP, and which persons or positions are employees of the Contract school. If the ESP leases employees to the Contract school, the ESP agreement must provide that the leasing company accepts full liability for benefits, salaries, worker's compensation, unemployment compensation and liability insurance for its employees leased to the Contract school or working on Contract school operations. If the Contract school is staffed through an employee leasing agreement, legal confirmation must be provided to the Contract school board that the employment structure qualifies as employee leasing.

14. ESP agreements must contain insurance and indemnification provisions outlining the coverage the ESP will obtain. The ESP's insurance is separate from and in addition to the insurance for the Contract school board that is required according to the Contract. Insurance coverage must take into account whether or not staff at the school are employees of the ESP or the school.

15. Marketing and development costs paid by or charged to the Contract school shall be limited to those costs specific to the Contract school program, and shall not include any costs for the marketing and development of the ESP.

16. If the Contract school intends to enter into a lease, execute promissory notes or other negotiable instruments, or enter into a lease-purchase agreement or other financing relationships with the ESP, then such agreements must be separately documented and not be a part of or incorporated into the ESP agreement. Such agreements must be consistent with the school's authority to terminate the ESP agreement and continue operation of the school.

Attachment 7: Physical Plant

Pursuant to Applicable Law and the Terms and Conditions of this Contract, the School is authorized to operate at the physical facility or facilities outlined in this schedule. The School shall not occupy or use any facility until approved by the Commission and facility has been approved for occupancy by the appropriate state, county and city departments.

Physical Plan Description

Site Plans

Floor Plans

Lease Agreement

Certificate of Use and Occupancy

Charter School

Physical Plan Description

1. The address and a description of the site and physical plant (the “Site”) of Catalyst: Bremerton (the “School”) is as follows:

Address:

Description:

Configuration of Grade Levels:

Term of Use: Term of Contract

2. The following information about this site is provided on the following pages, or must be provided to the satisfaction of the Commission or its designee, before the School may operate as a public school in Washington State.
 - a. Narrative description of physical plant
 - b. Size of building
 - c. Scaled floor plan
 - d. Copy of executed lease or purchase agreement
3. In addition, the School and the Commission or its designee hereby acknowledge and agree that the School shall not conduct classes or operate as a charter public school in this state until it has obtained the necessary fire, health and safety approvals for the above described facilities. These approvals must be provided by the School to the Commission’s Executive Director in advance of any such occupancy and must be acceptable to the Commission or its designee, in his/her sole discretion, prior to the School operating as a charter public school.
4. If the Site described above is not used as the physical plant for the School, this Attachment of this contract between the School and the Commission must be amended pursuant to the Terms and Conditions of Contract, to designate, describe, and agree upon the School’s physical plant. The School must submit to the Commission or its designee complete information about the new site or facilities. This information includes that described in paragraphs 1, 2 and 3 of this Attachment. The School shall not conduct classes as a charter public school in this state until it has submitted all the information described above to the satisfaction of the Commission by way of a request to amend this Contract and the amendment regarding the new site has been executed by the Commission or its designee.

5. The School agrees to comply with the single site restrictions contained in this Attachment for the configuration of grade levels identified at the Site, except as may be permitted with the express permission of the Commission or its designee. Any changes in the configuration of grade levels at the Site requires an amendment to this Attachment pursuant to the Terms and Conditions of the Contract set forth above.

Attachment 8: Statement of Assurances

STATEMENT OF ASSURANCES

This Statement of Assurances must be signed by a duly authorized representative of the charter school.

As the duly authorized representative of the charter public school (the school), I hereby certify under the penalty of perjury that all information and statements submitted for or on behalf of: Catalyst: Bremerton are accurate and true to the best of my knowledge and belief; and further, I certify and assure that:

1. The School shall have a fully independent governing board that will exercise autonomy in all matters, to the extent authorized by chapter 28A.710 RCW, in such areas as budget, personnel and educational programs;
2. The School is either a public benefit nonprofit corporation as defined in RCW 24.03.490, or a nonprofit corporation as defined in RCW 24.03.005 that has applied for tax exempt status under section 501(c)(3) of the internal revenue code of 1986 (26 U.S.C. Sec. 501(c)(3)), shall not be a sectarian or religious organization, shall meet all of the requirements for a public benefit nonprofit corporation before receiving any funding under RCW 28A.710.220, shall be governed by an independent governing board, and shall be operated according to the terms of a charter contract executed with the Washington State Charter School Commission;
3. The School shall function as a local education agency under applicable federal laws and regulations, shall be responsible for meeting, and shall meet the requirements of local education agencies and public schools under those federal laws and regulations, including but not limited to:
 - a. Compliance with the individuals with disabilities education improvement act (IDEA, 20 U.S.C. Sec. 1401 et seq.);
 - b. Compliance with the federal educational rights and privacy act (FERPA, 20 U.S.C. Sec. 1232g);
 - c. Compliance with the elementary and secondary education act (ESEA, 20 U.S.C. Sec. 6301 et seq.);
 - d. Compliance with requirements that ensure a student's records, and, if applicable, a student's individualized education program, will follow the student, in accordance with applicable federal and state law;
 - e. Compliance with the Every Child Succeeds Act and the No Child Left Behind Act, to the extent that NCLB provisions remain active, including but not limited to, provisions on school prayer, the Boy Scouts of America Equal Access Act, the Armed Forces Recruiter Access to Students and Student Recruiting Information, the Unsafe School Choice Option and assessments;
 - f. Compliance with Title IX of the Education Amendments of 1972 (20 U.S.C. § 1681);
 - g. Compliance with Section 504 of the Rehabilitation Act of 1973 (29 U.S.C. § 794); and
 - h. Compliance with Title II of the Americans With Disabilities Act of 1990 (42 U.S.C. § 12101).
 - i. McKinney-Vento homeless assistance act of 1987 (42 U.S.C. Sec. 11431 et seq.)
4. The School shall hire, manage, and discharge any charter school employee in accordance with the terms of Chapter 28A.710 RCW and the school's charter contract;
5. The School shall receive and disburse funds solely in accordance with the purposes of the charter school;
6. To the extent it enters into contracts with any school district, educational service district, or other public or private entity for the provision of real property, equipment, goods, supplies, and services, including educational instructional services and including for the management and operation of the charter

school, the School shall do so to the same extent as other non-charter public schools, as long as the School's board maintains oversight authority over the charter school;

7. The School shall not enter into any contracts for management operation of the charter school except with nonprofit organizations;

8. To the extent it enters into contracts with other entities regarding real property, the School shall include provisions regarding the disposition of the property if the charter school fails to open as planned or closes, or if the charter contract is revoked or not renewed;

9. To the extent it issues secured and unsecured debt, including pledging, assigning, or encumbering its assets to be used as collateral for loans or extensions of credit to manage cash flow, improve operations, or finance the acquisition of real property or equipment, the School shall not pledge, assign, or encumber any public funds received or to be received pursuant to RCW 28A.710.220;

10. The School shall ensure that no debt incurred by the School is a general, special, or moral obligation of the state or any other political subdivision or agency of the state;

11. The School shall not pledge either the full faith and credit or the taxing power of the state or any political subdivision or agency of the state for the payment of the debt;

12. To the extent it solicits, accepts, and administers for the benefit of the charter school and its students, gifts, grants, and donations from individuals or public or private entities, the School shall not solicit, accept, and administer any such gifts, grants or donations from sectarian or religious organizations and shall not accept any gifts or donations the conditions of which violate Chapter 28A.710 RCW or any other state laws;

13. The School shall issue diplomas to students who meet state high school graduation requirements established under RCW 28A.230.090 even though the charter school board may establish additional graduation requirements;

14. The School shall not levy taxes or issue tax-backed bonds and shall not acquire or attempt to acquire property by eminent domain;

15. The School shall operate according to the terms of its charter contract and the provisions of Chapter 28A.710 RCW;

16. The School shall comply with local, state, and federal health, safety, parents' rights, civil rights, and nondiscrimination laws applicable to school districts and to the same extent as school districts, including but not limited to chapter 28A.642 RCW (discrimination prohibition), chapter 28A.640 RCW (sexual equality), RCW 28A.605.030 (student education records, RCW 28A.320.125 (safe school plans), and chapter 28A.210 RCW (health and screening requirements);

17. The School shall provide basic education, as provided in RCW 28A.150.210, including instruction in the essential academic learning requirements and shall participate in the statewide student assessment system as developed under RCW 28A.655.070 and in accordance with the requirements of chapter 28A.710 RCW;

18. The School shall employ certificated instructional staff as required in RCW 28A.410.025, provided that the Schools may hire non-certificated instructional staff of unusual competence and in exceptional cases as specified in RCW 28A.150.203 (7);

19. The School shall comply with the employee record check requirements in RCW 28A.400.303;

20. The School shall adhere to generally accepted accounting principles and be subject to financial examinations and audits as determined by the state auditor, including annual audits for legal and fiscal compliance;

21. The School shall comply with the annual performance report under RCW 28A.655.110;

22. The School shall be subject to the performance improvement goals adopted by the state board of education under RCW 28A.305.130;
23. The School shall comply with the open public meetings act in chapter 42.30 RCW and public records requirements in chapter 42.56 RCW;
24. The School shall be subject to and comply with all legislation governing the operation and management of charter schools;
25. The School shall comply with all state statutes and rules made applicable to the charter school in the school's charter contract;
26. The School shall not engage in any sectarian practices in its education program, admissions or employment policies, or operations;
27. The School shall be subject to the supervision of the superintendent of public instruction and the state board of education, including accountability measures, to the same extent as other public schools, except as otherwise expressly provided by law;
28. The School shall not limit admission on any basis other than age group, grade level, or capacity and must enroll all students who apply within these bases and shall be open to any student regardless of his or her location of residence;
29. The School shall not charge tuition, but may charge fees for participation in optional extracurricular events and activities in the same manner and to the same extent as do other public schools;
30. If capacity is insufficient to enroll all students who apply to the charter school, the School must select students through a lottery to ensure fairness, however, the School must give an enrollment preference to siblings of already enrolled students;
31. The School's Board shall annually determine the capacity of the School in consultation with the Commission and with consideration of the School's ability to facilitate the academic success of its students, achieve the objectives specified in the charter contract, and assure that its student enrollment does not exceed the capacity of its facility;
32. The School shall comply with all health and safety laws, rules and regulations of the federal, state, county, region, or community that may apply to its facilities and property;
33. The School has disclosed any real, potential or perceived conflicts of interest that could impact the approval or operation of the School;
34. The School shall meet any reasonable preopening and/or reopening requirements or conditions imposed by the Commission, including but not limited to requirements or conditions to monitor the start-up progress of the School and to ensure that the School is prepared to open smoothly on the date agreed, and to ensure that the School meets all building, health, safety, insurance, and other legal requirements for school opening;
35. The School shall comply with, and fully participate in, any activity by the Commission that the Commission deems necessary for it to monitor, engage in oversight, and/or engage in corrective action pursuant to RCW 28A.710.180;
36. The School shall comply with any corrective actions or sanctions imposed upon it by the Commission pursuant to Chapter 28A.710 RCW;
37. The School shall comply with all renewal and nonrenewal actions required of it by the Commission or by law, including but not limited to the requirements imposed by RCW 28A.710.190 and .200;
38. The School shall comply with any nonrenewal of termination actions imposed by the Commission pursuant to Chapter 28A.710 RCW and duly adopted rules of the Commission;

39. The School shall report student enrollment in the same manner and based on the same definitions of enrolled students and annual average full-time equivalent enrollment as other public schools;
40. The School shall comply with applicable reporting requirements to receive state or federal funding that is allocated based on student characteristics;
41. The School shall, at all times, maintain all necessary and appropriate insurance coverage;
42. The School shall indemnify and hold harmless the Commission and its officers, directors, agents and employees, and any successors and assigns from any and all liability, cause of action, or other injury or damage in any way relating to the School or its operation;
43. The School has not been assisted by any current or former employee of the state of Washington whose duties relate or did relate to this proposal or prospective contract, and who was assisting in other than his or her official, public capacity. If there are exceptions to these assurances, the School has described them in full detail on a separate page attached to this document.
44. The School will notify families of current and prospective students of any ongoing litigation challenging the constitutionality of charter schools or that may require charter schools to cease operations through web site postings and written notice with signed acknowledgement of receipt.
45. Board members will complete the financial affairs statement disclosures as required by law and address any conflicts identified by such disclosure.
46. All of the information submitted in the Application is true, correct, complete, and in compliance with Chapter 28A.710 RCW as well as Chapters 108-10 and 108-20 WAC.
47. All of the information contained in the Application reflects the original work of the applicant; no portion of the application was copied or plagiarized.
48. These assurances are made by the Board through its duly authorized representative. The Board has reviewed and discussed these assurances and passed a motion affirming current and future compliance with these assurances.

NAME OF SCHOOL

SIGNATURE OF DULY AUTHORIZED REPRESENTATIVE

DATE

NAME OF DULY AUTHORIZED REPRESENTATIVE

Attachment 9: Identification of Documentation Required for Annual Performance Report

The Commission will require submission of, or access to materials or data from the school for oversight and accountability of the school.

Pursuant to RCW 28A.710.040(2)(f), the school shall publish annually for delivery to the Commission and each parent with children enrolled in the school a school performance report in model form under RCW 28A.655.110. The school performance report shall include, but is not limited to:

- A brief statement of the mission of the school and the school district;
- Enrollment statistics including student demographics;
- Expenditures per pupil for the school year;
- A summary of student scores on all mandated tests and interim assessment measures;
- A concise annual budget report;
- Student attendance, graduation, and dropout rates;
- Information regarding the use and condition of the school building or buildings;
- A brief description of the learning improvement plans for the school;
- A summary of the feedback from parents and community members obtained under RCW [28A.655.115](#); and an invitation to all parents and citizens to participate in school activities.

Performance Review and Ongoing Oversight

The school must also provide any documents, data or information that the Commission deems necessary for ongoing oversight, accountability, and compliance monitoring.

Attachment 10: Enrollment Policy

Catalyst will be culturally-inclusive and serve a diverse population in terms of race, ethnicity, national origin, gender, economic status, religion, home language, learning or physical disability, sexual orientation, or level of academic preparation.

Catalyst is open to all students at the appropriate age groups and grade levels who wish to attend without regard for the location of residence of students in Washington. There shall be no admission testing or other evaluation required of any applicant. Catalyst shall not charge tuition. If capacity is insufficient to enroll all students who apply to Catalyst, admission, except for existing students, shall be determined by a random, public lottery in accordance with any authorizer- approved enrollment preferences and the Open Public Meetings Act. Catalyst's enrollment policy and process is modeled, with permission, after the enrollment policies of Willow Public School and Ashé Preparatory Academy.

Catalyst will include, as part of its enrollment policy, a final timeline for application and enrollment period. The table below contains tentative dates for enrolling Catalyst's founding class of scholars. This timeline provides families with ample time to make a decision and submit required enrollment paperwork and the school to ensure strong data collection systems are in place to warehouse and organize student enrollment data securely and efficiently.

a. Application and Enrollment Period

Action	Timeline/Deadline
Application Period	October 1, 2019 - February 5, 2020
Admissions Lottery (<i>if needed</i>)	Saturday, February 8, 2020
Notify Admitted Students	Monday, February 10, 2020
Intent to Enroll Forms Due	Monday, February 17, 2020
Waitlist Students Notified (<i>if applicable</i>)	Tuesday, February 18, 2020
Enrollment Packets Due	Saturday, February 29, 2020

Application and Enrollment Process

In the interest of reaching our target students, families, and communities, and minimizing any potential barriers to entry, the application process to Catalyst is designed to be as simple and accessible as possible. The application itself requires only information that is absolutely necessary, and it is available in languages predominantly spoken in Bremerton and the surrounding region. Catalyst staff is available and actively seek to assist any students or families in the application process.

Application and Enrollment Timeline

- **October 1** - Applications for admission to Catalyst will be made available via the school website, mailings to current parents and community members, and through various community outreach efforts.
- **February 5** – Final deadline for submission of applications from new applicants. Any applications received after this date and time will be placed at the end of the lottery-generated waitlist. All applications received in person will receive a confirmation receipt. Families are welcome to mail their application, fill one out on-line, or in person at the school's office. An acknowledgement letter will be sent upon receipt of the mail or online application. If a family does not receive or keep this receipt the school is not responsible for claims that an application was sent by mail but not received by the deadline. All receipts will be closely tracked but in the unlikely event that the record is lost, the school cannot take responsibility should an application be unaccounted for and the family does not have their record.
- **February 8** – If applications exceed the number of available seats, a random lottery for each grade level will be take place. The lottery will be conducted pursuant to Washington state's charter school law (RCW 28A.710.050) and the admissions policy, once approved the authorizer. The lottery will be open to the public and attended by a representative of the Catalyst Board of Directors and a neutral auditor. After all seats have been filled for each grade level, a lottery-generated waiting list will be created for each grade level, placing students in the order which their ticket was drawn. The waitlist will be valid for one year.
- **On-going** – If capacity is not reached by the application deadline, students will be enrolled to the school on a rolling basis. If and when the number of students surpasses the number of seats, students who submit applications after capacity is reached will be added to a waitlist, in the order that the school received their application.
- **February 10** - After the lottery is complete, all parents will be notified of the results of the lottery within 48 hours. Parents of accepted children will receive an **Intent to Enroll form**, which can either be picked up at the school, or mailed to the parent with a return envelope and postage included. School staff will be available to assist families with the completion of Intent to Enroll forms as necessary. Completion of the Intent to Enroll form guarantees the student a spot in the school and once a family submits and Intent to Enroll form this will receive an **Enrollment Packet**. Students who have been placed on the waiting list will also be notified of such placement within 48 hours of the lottery.
- **February 17** - Completed Intent to Enroll forms must be returned to the school. If mailed, the Intent to Enroll form must be postmarked by this date.
- Before the due date for the Intent to Enroll forms, Catalyst will attempt to verify personally with each parent by phone or at home if they intend to accept a seat at the school and encourage them to submit their Intent to Enroll form. If the school is unsuccessful in contacting the family

for verification or is not in receipt of an Intent to Enroll form, the family will then give up the seat and the student's name will be placed at the end of the lottery-generated the waitlist.

- **February 18** - If there are still seats available after the Intent to Enroll deadline, the school will begin accepting students on the waitlist. After all seats have been assigned, the lottery-generated wait list will be utilized for the remaining students who have registered if a seat should open. In all cases, Catalyst will adhere to all schedules and requirements pursuant to Washington State law concerning the recruitment and enrollment of students.
- **February 29** – Enrollment packets are due for lottery-selected students. If students are enrolled on a rolling basis, enrollment packet deadlines will be set accordingly to give families ample time to gather the necessary documentation. Late paperwork for admission and enrollment shall result in loss of opportunity for enrollment preferences as listed below, and may result in loss of opportunity for admission, but will be reserved in the case that the waiting list is completely exhausted in each year. Catalyst will provide extensive support to families, including holding office hours, home visits and Family Enrollment Events, to ensure all paperwork is received on time.
- The McKinney-Vento Homeless Assistance Act for Homeless Children and Youth entitles all homeless school-aged children to the same free and appropriate public education that is provided to non- homeless students. If there is an available seat, Catalyst will immediately enroll any homeless student, and will not delay or prevent the enrollment of a homeless student due to the lack of school or immunization records. If enrollment is at capacity, the student will be placed at the top of the waitlist and admitted as soon as a seat opens.

b. Student Recruitment Plan for Admission to the 2020-2021 School Year

Catalyst seeks to recruit most heavily from West Bremerton neighborhoods, which include our target populations of systemically underserved students: students of color, students from low-income families, and students learning English. In addition, Catalyst seeks to recruit heavily from the African-American, Biracial, Multi-Racial and Latinx communities from across Bremerton and Kitsap County. We will also be actively recruiting military families and their children.

The information sessions, home visits, and the application packet for admission to Catalyst shall include information that allows students and parents to be informed about Catalyst's operation as a charter school, its educational program, the academic and behavioral expectations of students, and the rights and responsibilities of students and parents who wish to join the Catalyst community.

Community Communication and Notification (July 2019 – September 2020)

All communication from Catalyst will be in English and Spanish, whenever possible. Other languages will be added, as needed. The following will also be implemented:

- Catalyst will place paid advertisements in local print media. The ads will announce that the school is public and tuition-free, accepting applications, contact information and dates, and times/locations for recruitment events.
- Catalyst will seek to include recruitment events and application deadlines on community calendars (print and electronic when available).

- If the addresses are available for students enrolled in target areas schools and preschools, Catalyst will mail postcards to each residence. The postcard will announce that Catalyst is accepting applications, contact information and dates, and times/locations for recruitment events.
- Catalyst will have a table set up at all major community events, fairs, farmers markets, celebrations, and parades to spread the word about Catalyst.
- Catalyst will be present in apartment buildings/complexes and in affordable housing communities, such as:
 - Bay Vista Housing Development
 - Knollwood Housing Development
 - Shadow Creek Apartments
 - Tamarack Apartments
 - Tara Heights
 - Winfield Apartments
 - Wright Court
- Catalyst will work with the faith-based community to present to full congregations.
- Catalyst will run a digital media marketing campaign with quick access to the Catalyst charter application and maintain a website that includes detailed information and updates on the school, recruitment, application process, and deadlines.
- Catalyst will post fliers announcing recruitment events at various public facilities frequented by school-aged students and families and set up tables at the entry to share more information at the following locations:
 - Marvin Williams Community Center
 - Coffee Oasis locations
 - Kitsap Immigration Assistance Center
 - Local restaurants and other community services
 - Organizations that serve Catalyst's target populations (recreation centers, libraries, athletic venues, and schools)
 - If allowed, Catalyst will place announcements in the parent newsletters or other communications at pre-schools and elementary schools that will feed into Catalyst. The announcements will state that the school is accepting applications, contact information and dates, and times/ locations for recruitment events.

Recruitment Events

Catalyst will host at least six recruitment open houses during the school year before school opens. See the following schedule and location of the events in preparation for the 2020 opening. Any events that take place after a facility for the school has been secured will be held at the school.

Each open house will include a presentation that provides a detailed description of Catalyst and its educational model. Participants will have an opportunity to provide feedback on defined aspects of the Catalyst program and ask questions in a large group setting or on a more individual basis. Participants will also have an opportunity to share ideas and ask questions through non-verbal means, to ensure all voices are given space to contribute. Participants will be given an application for admission and extensive written explanation of the school and its programs. The entire event and all written materials will be translated into Spanish and other languages as needed.

Beginning in November of 2019 and concluding in April, Catalyst will host a weekly small group question-and-answer session for the parents of prospective students. The session will be facilitated by a representative from the school. During the session, participants will be given the written materials and application provided at the open house. In subsequent years, they will have an opportunity to observe our classes in session and ask individual questions.

Catalyst will request to be one of the schools included in any annual pre-school fairs in early childhood programs serving Bremerton families.

Catalyst will request the opportunity to present or be a part of any other elementary information opportunities or events hosted by the target schools or districts.

Conditions of Enrollment

Catalyst shall have the following requirements that must be met by each student and his or her family before enrollment is complete:

- Complete enrollment/registration forms including student data sheet, emergency information cards and other required documents.
- Provide records documenting immunizations required by public schools.
- Admission tests will not be required; however, assessments will be administered following enrollment to determine personalized learning plans. These tests will serve as diagnostics of students' reading, writing and math skills. Catalyst will use a student information system to process enrollment as the student body grows.

c. Lottery Procedures

The lottery will, generally, follow the order below:

- Current students are automatically re-enrolled to the next grade.
- If spaces are available, and once an application is completed and duly submitted, siblings of currently enrolled students will be automatically enrolled. If a grade has more sibling applicants than openings, sibling applicants will be drawn at random.
- New applicants are drawn completely for each grade, beginning with the lowest entry grade, until all applicants are placed in a grade or the waiting list. As applicants are drawn and enrolled, siblings will also be immediately enrolled.
- After all spaces are filled, the drawing continues to determine the order of the waiting list.

Lottery rules, deadlines, dates and times for the lottery will be communicated in the admission

applications and on Catalyst's website. Public notice for the date and time of any lottery will be posted once the application deadline has passed. Catalyst will inform parents of all applicants and all interested parties of the rules to be followed during the lottery process, location, date, and time via mail or email at least two weeks prior to the lottery date.

d. Weighted Enrollment Preference

Catalyst will grant an enrollment preference to siblings of currently-enrolled students, with any remaining enrollments allocated through a lottery per RCW 28A.710.050(3). Before Catalyst conducts the lottery, the school will work with the Commission to legally grant a weighted enrollment preference to children of full-time employees of Catalyst, as well as to at-risk students to ensure that Catalyst is serving students in its target populations and adhering to lottery terms pursuant to the Charter School Program Grant.

e. Waiting Lists, Withdrawals, Reenrollment, and Transfers

Waiting Lists

Using the lottery and waitlist process outlined above, Catalyst will notify families of available spots in a timely, systematic way. Students will be taken off the waitlist in the order they are placed. This waitlist will allow students the option of enrollment in the case of an opening during the current school year. In no circumstance will a waitlist carry over to the following school year.

Re-Enrollments

Students are assumed to be returning to the school each fall unless the school is informed otherwise. Re-enrollment of currently enrolled students is automatic, and the school will issue Intent to Renew Enrollment forms to confirm student status. Re-enrollment of previously enrolled Catalyst students that have unenrolled will be dependent upon capacity. The student may be placed on the waitlist.

Withdrawals

To withdraw a student, the parent/guardian informs the school in writing that the student is transferring and indicates the school to which s/he is transferring. Catalyst is a school of choice and it is critical that all students and their parents review the school closely before deciding to enroll. We realize there may be circumstances in which a parent or guardian wishes to transfer their child to a different school. In these instances, Catalyst personnel will offer to meet with the family to discuss the reasons for the desired withdrawal from the school and seek solutions to any problems within the school community. If the parent or guardian still wishes to transfer their child to another school, staff at Catalyst will make every reasonable effort to help the student find a school that better serves the family's desires. Catalyst will ensure the timely transfer of any necessary school records to the student's new school.

Transfers

Students who wish to transfer to Catalyst will be placed on the waiting list and notified when an opening exists. Students that enter mid-year will be supported with acculturation (see **Section 8: School Culture**).

Attachment 11: New School Application



WASHINGTON STATE
Charter School Commission
STUDENTS • INNOVATION • TRANSPARENCY

NEW CHARTER SCHOOL APPLICATION

For Schools Opening in the 2020-2021 School Year

Issue Date: September 04, 2018

Updated: January 29, 2019

Due Date: March 1, 2019 5:00 p.m. PT

////////////////////////////////////

Washington State Charter School Commission

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For more information about the contents of this document, please contact:

Amanda Martinez, New Charter School Application Coordinator

Email: amanda.martinez@k12.wa.us

Phone: (360) 725-5511

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Washington State Charter School Commission
Attn: Executive Director
PO Box 40996, Olympia, WA 98504-0996
charterschoolinfo@k12.wa.us
(360) 725-5511

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INTRODUCTION

The Washington State Charter School Commission (Commission) was created in 2013, after the approval of Initiative 1240, and ratified when Engrossed Second Substitute Senate Bill 6194 became law in April 2016, to serve as a statewide charter school authorizer. The 11-member Commission is tasked with running a process to approve new charter schools, and effectively monitoring the schools it authorizes through ongoing oversight. Per the Charter School Act, the Commission has established its strategic vision for authorizing to guide its work:

The Washington State Charter School Commission seeks to authorize high-quality schools that will significantly improve student outcomes, particularly for at-risk students. The Commission will hold schools accountable for student learning using multiple measures of student achievement.

The Commission seeks to build a diverse portfolio of school delivery models that expands the authority of teachers and school leaders and encourages and accelerates the identification and use of best practices in teaching and learning. It also seeks to develop, test, and document innovative, new ideas that can be replicated in other Washington schools.

The Commission expects schools to have authentic and sustainable connections to the communities they serve. These connections are evidenced by strong commitments from community and business stakeholders, systems for ensuring cultural sensitivity, responsiveness to all students and their families, and effective, engaged governance boards.

Note: at-risk students are defined in RCW 28A.710.010(2):

“At-risk student” means a student who has an academic or economic disadvantage that requires assistance or special services to succeed in educational programs. The term includes, but is not limited to, students who do not meet minimum standards of academic proficiency, students who are at risk of dropping out of high school, students in chronically low-performing schools, students with higher than average disciplinary sanctions, students with lower participation rates in advanced or gifted programs, students who are limited in English proficiency, students who are members of economically disadvantaged families, and students who are identified as having special educational needs.

The Commission is an agency that is guided by its mission, strives to achieve its vision and aspires to operate in alignment with a set of core values.

Mission

To authorize high-quality charter public schools and provide effective oversight and transparent accountability to improve educational outcomes for at-risk students.

Values

Student-Centered

Cultural and Community Responsiveness

Excellence and Continuous Learning

Accountability/Responsibility

Transparency

Innovation

Vision

Foster innovation and ensure excellence so that every student has access to and thrives in a high-quality public school.

The Charter School Act requires the Commission to annually issue a solicitation for applications (New Charter School Application) to open new charter schools. Through the issuance of this New Charter School Application, the Commission seeks applicants to open new high-quality charter schools that are aligned with its strategic vision throughout the state of Washington. To that end, the Commission worked closely with a national third-party, the National Association of Charter School Authorizers (NACSA), in 2013 to develop a rigorous, thorough, and transparent response and review process and has enhanced the process each year.

The Commission is committed to authorizing schools that are culturally responsive. To that end, the Commission requires applicants to demonstrate how they will implement the following concepts throughout their application:

Cultural Inclusion

Inclusion is widely thought of as a practice of ensuring that people in organizations feel they belong, are engaged, and are connected through their work to the goals and objectives of the organization. Miller and Katz (2002) present a common definition: “Inclusion is a sense of belonging: feeling respected, valued for who you are, feeling a level of supportive energy and commitment from others so that you can do your best work.” The process of inclusion seeks to engage each individual and make each feel valued and essential to the success of the organization. Individuals function at full capacity, feel more valued and are included in the organization’s mission.¹

¹ Puget Sound Educational Service District. (2014). Racial Equity Policy. (p. 7) Seattle, WA: Blanford, S

Culturally Responsive Education Systems

Culturally responsive educational systems are grounded in the belief that all culturally and linguistically diverse students can excel in academic endeavors when their culture, language, heritage, and experiences are valued and used to facilitate their learning and development, and they are provided access to high-quality teachers, programs, and resources.

Cultural Competence

Cultural competence is based on integrating the awareness and learned skills needed to effectively and sensitively educate, work with, and serve people from diverse backgrounds and social identities. These skills enable the educator to build on the cultural and language assets and qualities that young people bring to the classroom rather than viewing them as deficits.²

Cultural competence allows educators to ask questions about their instructional practice in order to successfully teach students who come from different cultural backgrounds.

Developing skills in cultural competence is like learning a language, a sport, or an instrument. The learner must learn, relearn, continuously practice, and develop in an environment of constant change. Cultures and individuals are dynamic – they constantly adapt and evolve.

Cultural competence is:

- Knowing the community where the school is located,
- Understanding all people have a unique world view,
- Using curriculum and implementing an educational program that is respectful of and relevant to the cultures represented in its student body,
- Being alert to the ways that culture affects who we are,
- Places the focus of responsibility on the professional and the institution,
- Examining the negative and disproportionate impact of systems, structures, policies and practices on all students and families particularly those who come from different cultures and background.

² Leadscape, National Institute for Urban School Improvement. (2010) Culturally Responsive Coaching for Inclusive Schools. (p. 4) Tempe, AZ: Mulligan, E. M., Kozleski, E. M.

Eligibility

This New Charter School Application process seeks applications for schools that plan to open and serve students in the 2020-2021 school year. If an applicant submits an application for the 2021-2022 school year, it will be reviewed for the same readiness standards as the schools intending to open in the designated solicitation year (2020-2021). Applicants for the 2021-2022 school year must *also* provide good cause for delaying the proposed school's opening for one year beyond the designated solicitation year. This delay, if granted by the Commission, will count as an extension of the school's one year planning delay under RCW 28A.710.160.

By law, only nonprofit organizations may operate charter schools in the state of Washington. An applicant must be either a public benefit nonprofit corporation as defined in RCW 24.03.490, or a nonprofit corporation as defined in RCW 24.03.005 that has applied for tax exempt status under section 501(c)(3) of the Internal Revenue Code of 1986 (26 U.S.C. Sec. 501(c)(3)). The nonprofit corporation may not be a sectarian or religious organization and must meet all of the requirements for a public benefit nonprofit corporation before receiving any funding under RCW 28A.710.220.

Additionally, contracts for management operation of a charter school may only be with nonprofit organizations. Contracts with education service providers for substantial educational services, management services, or both, must also be with a nonprofit organization. Proof of nonprofit corporation status of such contractors must be provided.

Applications will be reviewed for satisfaction of the eligibility requirements (see Completeness Review). If these eligibility requirements are not met, the application may be summarily rejected.

Additionally, for schools opening in 2020 -2021, applicants will have the option of also applying for federal Charter School Program (CSP) planning and implementation grants – *when* they submit their New Charter School Application (See Section 30). Approved new charter school applicants are then eligible to collaborate with Office of the Superintendent of Public Instruction (OSPI) to complete CSP requirements for the CSP federal planning and implementation funds.

ADMINISTRATIVE REQUIREMENTS

Reservation of Rights

The Commission reserves the right to reject any and all applications for any reason, reissue the New Charter School Application, or cancel the New Charter School Application, as deemed appropriate by the Commission. **Applicants are expected to review this New Charter School Application closely;** revisions have been made to process and content.

Proper Communication

Upon release of this New Charter School Application, all applicant communications must be directed to the New Charter School Application Coordinator. Unauthorized contact with other state employees or representatives may result in disqualification. All oral communications will be considered unofficial and non-binding. Applicants should rely only on written statements issued by the New Charter School Application Coordinator.

Amanda Martinez, New Charter School Application Coordinator Telephone: (360) 725-5511
Washington State Charter School Commission Email: amanda.martinez@k12.wa.us
PO Box 40996
Olympia, WA 98504-0996

Applicant Questions and Complaints

Applicant questions regarding this New Charter School Application will be allowed consistent with the *New Charter School Application Timeline (Timeline)*. All questions must be submitted in writing (email acceptable) to the New Charter School Application Coordinator. Official written Commission responses will be provided for questions received by the deadlines, and will be posted at:

<http://charterschool.wa.gov/applying/application-updates/>

Applicants submitting questions will not be identified. Verbal responses to questions will be considered unofficial and non-binding. Only written responses posted to the Commission website listed above will be considered official and binding.

Applicants are encouraged to review the requirements of this New Charter School Application carefully, and submit any comments and recommendations to the New Charter School Application Coordinator. Where application requirements appear to prohibit or restrict an organization's participation, an explanation of the concern as well as suggested alternative language should be submitted in writing to

the New Charter School Application Coordinator by the deadline for Applicant Questions and Comments in the *Timeline*.

Applicants are expected to raise any questions, exceptions, or requested additions they have concerning the New Charter School Application requirements early in the New Charter School Application process. Applicants may submit specific complaints to the New Charter School Application Coordinator if the applicant believes the New Charter School Application contains inadequate or improper criteria, or that the application evaluation process unnecessarily restricts competition, or is flawed or unfair. The complaint must be made in writing to the New Charter School Application Coordinator before the due date set forth in the *Timeline*. The complaint should clearly articulate the basis for the complaint and include a proposed remedy. Complaints already raised may not be raised again during the Protest Procedures described on pages 14-15.

The New Charter School Application process will continue while complaints are being reviewed and responses are presented. Should an applicant complaint identify a change that would be in the best interest of the State to make, the Commission may modify this New Charter School Application accordingly. The modification to the New Charter School Application will be in writing and made in the form of an amendment to the New Charter School Application, and will be posted at <http://charterschool.wa.gov/applying/application-updates/>

The Commission's decision on a complaint is final and no further administrative appeal is available.

Delivery of Applications

The application, in its entirety, must be received by Commission no later than **5:00 p.m. PT on March 1, 2019**. All applications must be submitted using the secure, online Epicenter program, with hard copies mailed to the New Charter School Application Coordinator. Submissions are time stamped when they are submitted to the Epicenter program. **No submissions will be accepted after the deadline.**

Applicants should allow sufficient time to ensure timely receipt of the application by the New Charter School Application Coordinator. Late submissions will not be accepted and will be automatically disqualified from further consideration.

The Commission assumes no responsibility for delays caused by applicant's technical difficulties, network problems or any other party.

All application documents submitted in hard copy become the property of the Commission and will not be returned.

1. For Sections 1-30 of the narrative application:
 - a. As a separate paragraph, indicate the beginning of proprietary or confidential information with the following language (ALL CAPS and **bold**): **BEGIN PROPRIETARY/CONFIDENTIAL INFORMATION**; and
 - b. As a separate paragraph, indicate the end of proprietary or confidential information with the following language (ALL CAPS and **bold**): **END PROPRIETARY/CONFIDENTIAL INFORMATION**.
2. For Attachments 1-35:
 - a. Each page containing the information claimed to be exempt from disclosure must be identified with the language (all caps and bold) **PROPRIETARY/CONFIDENTIAL INFORMATION** printed on the lower right-hand corner of the page.
3. Applicants must use the guidance provided above to state clearly that the application contains any proprietary or confidential information, and should include as a footnote to the proprietary or confidential text or pages reasons that this information may be considered proprietary.

Marking the entire application as proprietary, confidential, or exempt from disclosure will not be honored.

To the extent consistent with RCW 42.56, the Public Disclosure Act, the Commission shall maintain the confidentiality of applicant's information marked confidential or proprietary. If a request is made to view proprietary information, the Commission will notify the applicant of the request and of the date that the records will be released unless the applicant obtains a court order enjoining that disclosure. If the applicant fails to obtain the court order enjoining disclosure, the Commission will release the requested information on the date specified.

The Commission's sole responsibility shall be limited to maintaining the above data in a secure area, and to notify the applicant of any request(s) for disclosure for so long as the Commission retains the applicant's information in Commission records. Failure to label such materials, or failure to timely respond after notice of request for public disclosure has been given, shall be deemed a waiver by the applicant of any claim that such materials are exempt from disclosure.

Completeness Review

All applications will be reviewed for completeness before they are accepted and distributed to the evaluation teams. If an application is found to be incomplete (i.e. missing responses to required application sections, certifications, assurances, attachments, signatures, etc.) or incorrectly formatted,

the applicant will be disqualified from further review. Applicants will be notified of an application's completeness or incompleteness per the *Timeline*. It should be noted that *findings of completion* are not indicative of the *quality* of the application. For findings of incompleteness, applicants will have 24-hours to remedy any identified area of incompleteness. Changes or updates will need to be completed within 24-hours of the Application Coordinator sending the Completeness Review report. Applications that remain incomplete after the 24-hour completeness window will be disqualified from further review. Applicants are encouraged to reapply in future years.

Waiver of Minor Administrative Irregularities

The Commission reserves the right to waive minor administrative irregularities contained in any application.

Errors in Application

Applicants are liable for all errors or omissions contained in their applications. Applicants will not be allowed to alter application documents after the deadline. The Commission is not liable for any such errors. The Commission reserves the right to contact the applicant for clarification of application contents, including through the Capacity Interview process.

Misrepresentations on Application

An application containing a material misrepresentation in the information or documentation submitted may be denied. A material misrepresentation includes, but is not limited to, one that is inaccurate or misleading, or a representation that, if accurately reported, could impact the rating that an applicant would receive on any applicable criteria. If, after a school is authorized, it is learned that the application contained a material misrepresentation, the resulting contract may be deemed null and void by the Commission.

Plagiarism

The content of an application must be a product of the applicant's own efforts and shall not be copied from other sources, with the exception of quotes that are properly attributed. For applications containing material whose original source is not their own, the applicant must properly and completely attribute the material to its primary source and show that it has permission to utilize the material.

Plagiarism is strictly prohibited and will result in automatic disqualification of the application. If, after a school is authorized, it is learned that a portion of the application was plagiarized, the resulting contract may be deemed null and void by the Commission.

Due Diligence

The decision to approve an application to open and operate a charter public school requires a thorough vetting of the applicant and the components of the application. The Commission may engage in due diligence to verify and evaluate the information submitted as part of the evaluation process. Due diligence may include, but is not limited to:

1. Contacting individuals who may have knowledge about the information submitted and/or individuals associated with the applicant organization in order to evaluate the accuracy and validity of the information provided in the application; and
2. Review of information and documentation obtained from external sources in order to evaluate the accuracy and validity of the information provided in the application.

Relevant information gleaned through this due diligence process will be reduced to writing in a due diligence report and provided to the evaluation team and the Commission for use in determining whether the application meets the criteria for approval.

Amendments and Revisions

The Commission reserves the right to revise the *Timeline* or other portions of this New Charter School Application at any time. The Commission may correct errors in this document (identified either by the Commission or an applicant). Any changes or corrections will be by one or more written amendment(s), dated, and posted with this New Charter School Application at <http://charterschool.wa.gov/applying/application-updates/>.

Applicants are responsible for checking the Commission's website for changes and should do so frequently. The Commission will not be responsible for notifying applicants of changes in any other manner. All changes must be authorized and issued in writing by the New Charter School Application Coordinator. If there is any conflict between amendments, or between an amendment and the New Charter School Application, whichever document was issued last in time shall be controlling.

No Obligation to Contract

The Commission may deny applications that fail to meet statutory or authorizer requirements (RCW 28A.710.140). The Commission also reserves the right to refrain from selecting or contracting with any and all applicants.

Withdrawal of Application

Applicants may withdraw an application that has been submitted prior to the Commission Resolution Meeting (identified on the *Timeline*). To accomplish application withdrawal, a written request (an email attachment is allowed) signed by an authorized representative of the applicant must be submitted to the New Charter School Application Coordinator by 5:00 p.m. PT on May 27, 2019.

Failure to respond to the Commission according to the *Timeline* below, or failure to respond to an inquiry or communication from the Commission to the applicant's designated representative, shall be deemed a withdrawal.

Optional Applicant Debriefing Conference

Applicants whose applications are not approved by the Commission may request an optional debriefing conference to discuss the evaluation of their application within the date range specified in the *Timeline*. The request must be in writing (email acceptable) and addressed to the New Charter School Application Coordinator.

The purpose of this debriefing is to discuss the factors considered in the evaluation of the application and address questions and concerns about the applicant's performance with regard to the New Charter School Application requirements. This conference will not include any discussion of, or comparison to applications from any other applicant, nor will it be an opportunity to challenge the evaluation ratings or argue the merits of the application.

Protest Procedures

Only applicants whose applications are not approved by the Commission AND who participate in a debriefing conference may make protests. Upon completion of the debriefing conference, the applicant will have five (5) business days to file a formal protest of the New Charter School Application with the New Charter School Application Coordinator.

Protests must be received by the New Charter School Application Coordinator no later than 5:00 p.m. PT on the fifth (5th) business day following the debriefing. Protests may be submitted by email, but must be followed in hard-copy form with an original signature.

In the event a protest may affect the interest of another applicant that also submitted an application, such applicant will be given an opportunity to submit its views and any relevant information on the protest to the New Charter School Application Coordinator.

Applicants submitting protests shall follow the procedures described below. Protests that do not follow these procedures will not be considered. This protest procedure constitutes the sole

administrative remedy available to applicants. All protests must be in writing, addressed to the New Charter School Application Coordinator, and signed by the protesting party or an authorized Agent.

1. The protest must state the New Charter School Application issue date, the grounds for the protest with specific facts believed to support the applicant's protest, and complete statements of the action(s) being protested.
2. The protests must contain a description of the relief or corrective action being requested.
3. Only protests stipulating an issue of fact concerning the following subjects will be considered:
 - a. A matter of bias, discrimination, or conflict of interest on the part of an evaluator; and/or
 - b. Non-compliance with procedures described in the New Charter School Application or Commission policy.
4. Protests not based on the issues itemized in paragraph 3 will not be considered.
5. Protests will be rejected as without merit if they address issues such as:
 - a. An evaluator's professional judgment on the quality of an application; and/or
 - b. The Commission's assessment of its own and/or other agencies' or communities' needs or requirements.
6. Upon receipt of a protest, a protest review will be held by the Commission. The Commission will assign responsibility for responding to the protest to a person who was not involved in the New Charter School Application or evaluation process; this person will prepare a recommendation report and submit it to the Commission.
7. The Commission will consider the protest recommendation report, record all available facts, and issue a decision; the decision must be issued within five (5) business days of receipt of the protest. If additional time is required, the protesting party will be notified of the delay.

The final determination of the protest shall:

1. Find the protest lacking in merit and uphold the Commission's action, denying the protest; or
2. Find only technical or harmless errors in the New Charter School Application and evaluation process and determine the Commission to be in substantial compliance, denying the protest; or
3. Find merit in the protest and provide the Commission options, which may include:
 - a. Correcting the errors and reevaluating all applications;

- b. The reissue of the New Charter School Application and conducting a new process; and/or
- c. The making of other findings and the determination of other courses of action as appropriate.

Notification of Commission Decisions

All applicants will be notified by email after a decision has been made. The date of notification will be the date the email is sent.

Electronic Availability

The contents of this New Charter School Application and any amendments or revisions and written answers to questions will be available at <http://charterschool.wa.gov/applying/application-updates/>. **Applicants are responsible for checking this site for notices and changes and should do so frequently.**

Revisions to the New Charter School Application

In the event it becomes necessary to revise any part of this New Charter School Application, addenda will be published at <http://charterschool.wa.gov/applying/application-updates/>. For this purpose, the published questions and answers and any other pertinent information shall be provided as an addendum to the New Charter School Application and will be placed on the website.

The Commission also reserves the right to cancel or reissue the New Charter School Application in whole, or in part, prior to execution of a contract.

Minority and Women-Owned Business Participation

In accordance with RCW 39.19, the Commission encourages participation in applications in response to this New Charter School Application by organizations certified by the Office of Minority and Women's Business Enterprises (OMWBE), on a direct or subcontractor basis. However, no preference for charters, including such organizations, will be given in the evaluation of applications, no minimum level of OMWBE participation shall be required as a condition for approval of a charter, and applications will not be rejected or considered non-responsive on that basis.

Terms and Provision of the Sample Contract

Submission of an Application constitutes acceptance of the solicitation contents and the sample contract constitutes acceptance of all terms and requirements stated therein. The sample contract, which is incorporated by reference, is located on the Commission's website at <http://charterschool.wa.gov/applying/application-materials/>.

INSTRUCTIONS AND GUIDELINES

Opening a new charter school that is prepared to be successful on day one requires investment in a thoughtful process to address the requirements to ensure a highly effective charter school. This New Charter School Application requires information that will allow the Commission to consider and determine if the application presents a school that is sufficiently well planned and researched, and that it not only has a compelling and rigorous academic model, but is fiscally and operationally sound as well. This New Charter School Application also seeks information that will allow the Commission to assess the capacity of the founding team to successfully implement the proposed plan.

In order for a thorough and rigorous review to occur, all applicants must respond to all questions and requests for information contained in this New Charter School Application. Failure to address all questions may result in the application being deemed incomplete.

Applicants are encouraged to reference the New Charter School Application Evaluation Rubric (for schools opening in 2020-2021) when preparing their applications to ensure that the responses not only answer the items below, but also address all of the evaluation rubric criteria. For information on how approved schools will be evaluated once they have opened, applicants should reference the Commission's performance framework (WAC 108-30), which is available on the Commission's website at <http://charterschool.wa.gov/operating/performance-framework/> and incorporated by reference.

All applicants must submit a Notice of Intent to Apply (NOI), prepared using the template provided on the Commission's website, no later than **5:00 p.m. PT on November 30, 2018** to the New Charter School Application Coordinator by email, postal service, or hand delivery. Once the Commission receives an applicant's NOI, the applicant will receive access to the secure, online Epicenter program.

Applications must be submitted no later than **5:00 p.m. PT on March 1, 2019**. Commission rules governing the application and approval process (WAC 108-10 and 108-20) are incorporated by reference and available on the Commission's website. All applicants must initially submit their applications electronically. For the New Charter School Application for schools opening in 2020-2021, all electronic submissions must be uploaded to the Commission assigned secure, online Epicenter program, by the deadline.

Learning Opportunities

Four in-person New Charter School Application Orientations designed to support prospective charter school applicants will be conducted on September 26, 2018 (Olympia), September 27, 2018

(Bellingham), October 3, 201 (Spokane), and October 4, 2018 (Seattle). The purpose of these full work-day orientations is to deepen understanding of:

1. The Commission's expectations as articulated in the New Charter School Application;
2. How applications will be evaluated;
3. The purpose and format of the Capacity Interview and Public Forum; and
4. Changes that have occurred to the New Charter School Application since the last cycle.

For more information regarding the New Charter School Application Orientations, please visit <http://charterschool.wa.gov/applying/application-process/>.

Components of the Application & Application Process

Narrative Application

The application is the formal application to the Commission and is a comprehensive description of the school's educational, organizational, and financial plans.

Attachments

Throughout the application, specific documents are requested in addition to narrative answers. A comprehensive list of the attachments is provided on pages 21-24.

Capacity Interview

Applicants will have the opportunity to participate in a performance task to demonstrate the team's capacity to open and maintain a high-quality charter school, as well as to answer specific questions about their application from the evaluator team.

Public Forum

The public forum will provide an opportunity for the public to learn more about and to provide input on, each application. While the public forum is not scored, information gleaned from this process may be used to evaluate the applicant. Applicants will be given a notice of at least five business days before the scheduled public forum date.

Commission Resolution Meeting

Applicants are invited to attend the Commission's May 30, 2019 meeting where they will be allowed to provide a short presentation regarding their application and then engage in a question and answer session with Commissioners.

Electronic Submission Instructions

1. **Applicants may begin writing their application narrative and completing the associated attachments and templates as MS Word documents. A secure, online, Epicenter account assigned to each applicant, with template documents and instructions, will be available to applicants after they have submitted their NOI.** The applicant must populate the required templates, as well as upload associated attachments and narrative sections of the application to the Epicenter program by the deadline.
2. Applicants should populate each template and upload each section attachment in Epicenter. **Applicants should ensure that documents are uploaded in the file format specified.** An overview of how to use Epicenter will be included in the training sessions referenced in the section titled *Learning Opportunities*.
3. Applicants are responsible for ensuring that only their FINAL application narrative, attachments and required templates are uploaded to Epicenter by the noted deadline. Changes or edits to the submitted application will not be allowed after 5:00 p.m. PT on March 1, 2019 except if requested by the Commission. If the applicant has completed their application prior to the application deadline and desires to make additional revisions prior to the application deadline, the applicant may do so.
4. **Applicants will not be able to modify their application after 5:00 p.m. PT on March 1, 2019.** Applications not uploaded, including applications that are partially uploaded, will not be accepted after this point.

Once the electronic submission is received and a completeness determination has been issued, all applicants proceeding in the evaluation process must submit five **(5) identical photocopies of the application to the New Charter School Application Coordinator. Additionally, one (1) redacted electronic copy (in PDF form) must be uploaded to Epicenter.** . The redacted electronic document should omit personal telephone numbers, email addresses, home addresses, and signatures, as well as check images and receipts (see *Timeline* for due date).

Hard Copy Preparation Instructions

Applicants should print their application directly from the application uploaded to Epicenter **prior** to the March 1, 2019 deadline.

1. All application documents should be printed on STANDARD, WHITE, LETTER SIZED PAPER, DOUBLE SIDED.
2. All application documents should be bound in a 3-ring binder.
3. Attachments should be numbered and offset with labeled tabs.
4. **Hard copies and the redacted electronic (PDF) copy should be submitted to the Commission per the *New Charter School Application Timeline* on pages 24-25. Submit to:**

Postal/Courier Service:

Amanda Martinez
New Charter School Application Coordinator
Washington State Charter School Commission
PO Box 40996
Olympia, WA 98504-0996

Hand Delivered:

Amanda Martinez
New Charter School Application Coordinator
1068 Washington Street SE
Olympia, WA 98501

Specifications

1. Applicants MUST submit applications electronically through the secure, online Epicenter program provided by the Commission, and must use the following templates (available on the Commission's website and in the applicant's Epicenter account):
 - a. Charter School Commission Application Cover Sheet (Category 1) – ALL APPLICANTS (MS Word Document)
 - b. Pending Authorization and School Opening Form Template (Section 1: Attachment 1) – ALL APPLICANTS (MS Word Document);
 - c. Statement of Assurances (Section 14: Attachment 11) – ALL APPLICANTS (MS Word Document).
 - d. Charter School Board Member Information Form (Section 16: Attachment 14) – ALL APPLICANTS (MS Word Document)
 - e. Background Check Certification Form (Section 16: Attachment 15) – ALL APPLICANTS (MS Word Document);
 - f. Staffing Chart Template (Section 21: Attachment 19) – ALL APPLICANTS (MS Word Document);
 - g. Mission-Specific Goals Form (Section 23: Attachment 23) – ALL APPLICANTS (MS Word Document);
 - h. Financial Plan Workbook (Updated 1.29.19) (Section 27: Attachment 27) – ALL APPLICANTS (MS Excel Document);
 - i. Portfolio Summary Template (Section 29: Attachment 33) – EXISTING OPERATORS ONLY (MS Excel Document).

- j. CSP Statement of Assurances (Section 30: Attachment 34) – ALL APPLICANTS applying for CSP subgrant (MS Word Document).
- k. CSP Budget Form and Narrative (Section 30: Attachment 35) – ALL APPLICANTS applying for CSP subgrant (FormS Excel Document, Narrative MS Word Document).

2. **All word limits must be followed. Applications exceeding the stated word limits will be rejected.**
3. If a particular section or question does not apply to the applicant team or application, respond “Not Applicable” AND state the rationale. Do not leave sections blank or your application may be found to be incomplete.
4. All required attachments should be uploaded in the file format specified (PDF, unless otherwise indicated).
5. Any footnotes made *within a narrative section* of the application will be added into that section’s word count. To avoid exceeding section word limits, applicants should attach a section’s footnotes as a separate document to the section to which they pertain. Please title the attachment: **Section Number.Footnotes**.
6. The following is a table of attachments to accompany the application and their associated category and section. Note that not all attachments will be applicable to all applicants. This list does not contain all required attachments. Attachments must be labeled by Section and Attachment number. As examples, Section 1: Attachment 1, Section 6: Attachment 5. All Attachments must be uploaded directly to the applicant’s Epicenter account. It is the responsibility of the applicant to ensure they submit all relevant attachments.

Category 1: General Information	
Sections A-E: General Information	Charter School Commission Application Cover Sheet
Category 2: Executive Summary	
Section 1: Executive Summary	<u>Attachment 1</u> : Pending Authorization and School Opening form
Category 3: Educational Program Design and Capacity	
Section 2: Family and Community Engagement	<u>Attachment 2</u> : Evidence of community support/engagement in the application process
Section 3: Program Overview	No Attachments

Section 4: Curriculum and Instructional Design	<u>Attachment 3</u> : Course scope and sequence <u>Attachment 4</u> : Curriculum development plan (if applicable)
Section 5: Student Performance Standards	<u>Attachment 5</u> : Exit standards for graduating students or students completing the last grade in that school.
Section 6: High School Graduation Requirements (High Schools Only)	No Attachment
Section 7: School Calendar and Schedule	<u>Attachment 6</u> : <ul style="list-style-type: none"> ▪ Year 1 of operation school calendar; ▪ Daily schedule; and ▪ Daily and weekly schedule
Section 8: School Culture	No Attachments
Section 9: Supplemental Programming	No Attachments
Section 10: Special Populations and At-Risk Students	No Attachments
Section 11: Student Recruitment and Enrollment	<u>Attachment 7</u> : Enrollment policy
Section 12: Student Discipline Policy and Plan	<u>Attachment 8</u> : Discipline policy
Section 13: Educational Program Capacity	<u>Attachment 9</u> : <ul style="list-style-type: none"> ▪ School leader resume and/or job description; and ▪ Plan for recruiting and hiring a strong and capable school leader <u>Attachment 10</u> : Leadership team job descriptions and/or resumes
Category 4: Operations Plan and Capacity	
Section 14: Legal Status and Governing Documents	<u>Attachment 11</u> : Governance documents: <ul style="list-style-type: none"> ▪ Articles of Incorporation; ▪ Proof of nonprofit status ▪ Bylaws; ▪ Board Chair signed Statement of Assurances; and; ▪ Other governing documents
Section 15: Organization Structure and Partnerships	<u>Attachment 12</u> : Organizational charts <u>Attachment 13</u> : Copies of Proposed Contracts

Section 16: Governing Board	<p><u>Attachment 14</u>: Board member documents:</p> <ul style="list-style-type: none"> ▪ Completed and signed Charter School Board Member Information Forms; and ▪ Board member Resumes <p><u>Attachment 15</u>: Signed Initial Background Check Certification form assuring that background check verification for each board member and school leader has been initiated and will be completed within the timetables set forth in the Sample Contract: Attachment 1, Pre-Opening Process and Conditions.</p> <p><u>Attachment 16</u>:</p> <ul style="list-style-type: none"> ▪ Code of Ethics Policy; and ▪ Conflict of Interest Policy
Section 17: Advisory Bodies	No Attachments
Section 18: Grievance/Complaint Process	No Attachments
Section 19: District Partnerships	<u>Attachment 17</u> : If available, Memorandum Of Understanding (MOU) or other partnership documentation (i.e. letters of support/partnership, etc.)
Section 20: Educational Service Providers (ESP)	<u>Attachment 18</u> : ESP contract term sheet
Section 21: Staffing Plans, Hiring, Management, and Evaluation	<p><u>Attachment 19</u>: Staffing chart</p> <p><u>Attachment 20</u>: Leadership evaluation tools</p> <p><u>Attachment 21</u>: Teacher evaluation tools</p>
Section 22: Professional Development	<u>Attachment 22</u> : Professional development schedule
Section 23: Performance Framework	<u>Attachment 23</u> : Mission-Specific Goals form
Section 24: Facilities	<u>Attachment 24</u> : Facility documents
Section 25: Start-up and Ongoing Operations	<p><u>Attachment 25</u>: Start-up plan</p> <p><u>Attachment 26</u>: Insurance coverage</p>
Section 26: Operations Capacity	No Attachments
Category 5: Financial Plan and Capacity	
Section 27: Financial Plan	<p><u>Attachment 27</u>: Financial plan workbook</p> <p><u>Attachment 28</u>: Budget narrative</p> <p><u>Attachment 29</u>: Evidence of philanthropic funding commitments noted in budget</p> <p><u>Attachment 30</u>: Fundraising plan</p>

Section 28: Financial Management Capacity	Attachment 31 : Recent internal financial statements Attachment 32 : Independent financial audit reports and management letters
Category 6: Existing Operators	
Section 29: Existing Operators	Attachment 33 : Portfolio Summary Template
Category 7: Federal Charter School Program Grant Application (Optional)	
Section 30: Federal Charter School Program Grant Application	Attachment 34 : Signed CSP Grant Statement of Assurances Attachment 35 : OSPI Project Budget Form and line item Budget Narrative

7. When submitting resumes, label each document with the individual's affiliation with the proposed school (Board member, School Leader, teacher, etc.).
8. Review all elements of the application for completeness before submitting.
9. Late or incorrectly formatted applications will not be accepted.

New Charter School Application Timeline*

The article below represents the timeline for the 2018-2019 New Charter School Application process. The deadlines and due dates are mandatory and nonnegotiable for applicants. Failure to meet the New Charter School Application submission deadline will result in disqualification from participation. All times are Pacific Time (PT). The Commission reserves the right to revise the timeline. Any revisions will be posted on the Commission's website at <http://charterschool.wa.gov/applying/application-updates/>

All Applicants will receive email notification.

Date	Activity
September 04, 2018	New Charter School Application Release

*Dates, times, locations, and activities subject to change.

2020-2021 New Charter School Application

September 26, 2018 (Olympia) September 27, 2018 (Bellingham) October 3, 2018 (Spokane) October 4, 2018 (Seattle)	New Charter School Application Orientations: An orientation designed to support prospective charter school applicants. The purpose of this full work-day orientation is to deepen understanding of: 1) The Commission's expectations as articulated in the New Charter School Application; 2) How applications will be evaluated; 3) The purpose and format of Public Forums; and 4) Changes that have occurred to the RFP since last cycle.
October 16, 2018	Applicant questions and comments deadline
October 23, 2018	Commission's written answers to questions issued
November 30, 2018 5:00 p.m.	Notice of Intent to Apply (NOI) due
December 4, 2018 10:00 a.m.	Epicenter Webinar – Invitation sent to applicants who submit an NOI
December 13, 2018	Applicant complaints deadline
December 20, 2018	Commission's written response to Complaints issued
March 1, 2019 5:00 p.m.	Proposal deadline
March 8, 2019	Completeness findings distributed
March 12, 2019 5:00 p.m.	Deadline for eligible Applicants to deliver hard copies of Proposals. A redacted PDF copy is required to be submitted via Epicenter.
April 16-17, 2019 (Only if needed – April 15 and 18)	Capacity Interviews. Interviews will ONLY be held on these days; applicants are requested to keep the dates entirely open in their calendars . Applicants will be notified of their assigned interview time as soon as possible. Due to significant logistical challenges, it is unlikely that any changes to assigned interview times will be possible.
April 22-26, 2019 (Only if needed – April 29-May 3, 2019)	Public Forums. Public Forums will ONLY be held on these days; applicants are requested to keep the dates entirely open in their calendars . The Application Coordinator will work with applicants to determine their Public Forum date as soon as possible. Due to significant logistical challenges, it is unlikely that any changes to the agreed upon Public Forum will be possible.
May 16, 2019	Recommendation Reports Released
May 16, 2019 5:00 p.m.	Deadline for public comments regarding eligible Applicants
May 27, 2019	Deadline for Applicant withdrawal
May 30, 2019	Commission Resolution Meeting: Commission will pass resolutions approving or denying charter school applications. Applicants are invited to attend the Resolution Meeting where they will be allowed to provide a short presentation regarding their application and then engage in a question and answer session with Commissioners.
June 3, 2019	Applicant request for optional debriefing due
June 4-7, 2019	Optional Applicant debriefings
Within five <u>business</u> days of debriefing	Deadline for filing Protest
August 28, 2019	Deadline for final contracts to be signed

CATEGORY 1: GENERAL INFORMATION

Submit the below information, Sections A-E, on the Charter School Application Cover Sheet.

Section A: School Information

1. School Name;
2. School Type (Elementary, Elementary/Middle, Middle, Junior High, Middle/High, High);
3. Grade Levels Served (K, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12);
4. School District;
5. Neighborhood/Community;
6. Phone;
7. Fax;
8. Website Address;
9. Street Address;
10. Sponsoring Entity (Nonprofit Organization, Governmental, College or University, State Board of Education); **
11. Open Date;
12. Contracted Educational Service Provider (EMO, CMO, Other);
13. Calendar Type (Standard or Extended School Year); and
14. Number of Instructional Days.

Section B: Primary Contact Person

1. Name;
2. Position;
3. Address;
4. Mobile Phone;
5. Alternate Phone;
6. Email address; and
7. Current Employer.

** In Washington state, a "charter school applicant" must be a nonprofit corporation that is either a public benefit nonprofit corporation as defined in RCW 24.03.490, or a nonprofit corporation as defined in RCW 24.03.005 that has applied for tax exempt status under section 501(c)(3) of the Internal Revenue Code.

Section C: Enrollment Projections

Complete the template provided. This table is derived from the applicant's School Information in Section A regarding grades served. The number of students must include the minimum and maximum planned enrollment per grade per year.

Section D: Current and Prospective Board Member Roster

1. Name;
2. Title on Board;
3. Contact (Phone & Email Address);
4. Mailing Address; and
5. Current Employer.

Section E: Start-Up Team

1. Name;
2. Title/Position on Start-up Team;
3. Contact (Phone & Email Address);
4. Mailing Address; and
5. Current Employer.

CATEGORY 2: EXECUTIVE SUMMARY

Section 1: Executive Summary (1500 Words)

The Executive Summary should provide a concise summary of the following:

1. **Educational Need, Anticipated Student Population, and Challenges:** Describe the proposed student population and the educational needs of the anticipated student population and non-academic challenges the school is likely to encounter. Explain how the school will increase opportunity and/or access to students who have been identified as at-risk as defined in RCW 28A.710.010(2). Provide the rationale for the number of students and grade levels served in year one of the attendance projection and the basis for the growth plan in the enrollment attendance projections provided on the cover sheet. Describe how the applicant team has assessed demand and/or need for the school.
 2. **Geographic Location:** Describe the geographic location of the school and the rationale for selecting the school location, and student body. Be explicit in the rationale for the location and align to the evidence of educational need, community/parent demand, anticipated student population and challenges. Identify any enrollment priorities the school intends to employ, consistent with applicable restrictions on enrollment eligibility and selection.
 3. **Plan, Mission, Vision, and Goals:** Describe the school plan and state the mission, vision, and goals of the proposed school.
 - a. The **vision** is a statement of the fundamental purpose of the school, describing why it exists; the **mission** statement outlines how the school will operate and what it will achieve long term. The mission and vision statements provide the foundation for the entire application. The mission and vision statements, taken together, should:
 - i) Identify the students and community to be served;
 - ii) Articulate the long-term goals for the school and the students it serves;
 - iii) Illustrate what success will look like; and
 - iv) Align with the purposes of the Washington charter school law (RCW 28A.710) and the Commission's stated priorities for new schools (WAC 108).
 - b. The long-term **goals** should articulate what the school hopes to achieve once it is at capacity and fully operational. Unlike the mission-specific goals, these are meant to be long-range and speak to operational and academic success.
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4. **Request for Additional Planning Year.** If the applicant is planning to open their school in the fall of 2021, please provide a rationale for this request. An applicant must describe the circumstances surrounding the proposed delay in opening the school.

Attachment 1: Pending Authorization and School Opening Form

CATEGORY 3: EDUCATIONAL PROGRAM DESIGN AND CAPACITY

Section 2: Family and Community Engagement (1300 Words)

1. Describe and provide evidence of how the school has assessed parent/guardian and community demand for the proposed school.
2. Describe the specific role to date of the parents/guardians and community members involved in developing the educational program and proposed school.
3. Describe how the school will engage parents/guardians in the life of the school and share how this plan will be culturally inclusive. Explain the plan for building family-school partnerships that strengthen support for learning and encourage parental involvement. Describe in detail any commitments or volunteer activities the school will seek from or offer to parents/guardians.
4. Describe the community resources that will be available to students and families. Describe any existing and/or anticipated partnerships or contractual relationships the school has or will have with community-based organizations, including those that serve culturally-specific populations, businesses, or other educational institutions. Specify the nature, purposes, terms, and scope of services of any such partnerships, including any fee-based or in-kind commitments from community organizations or individuals that will enrich student learning opportunities. Include, as **Attachment 2**, existing evidence of support from intended students, families and/or community partners, such as letters of intent/commitment, memoranda of understanding, and/or contracts.

Section 3: Program Overview (1500 Words)

The Program Overview should:

- Describe how the applicant will “provide a program of basic education that meets the goals in RCW 28A.150.210, including instruction in the essential academic learning requirements and participates in the statewide student assessment system;”
 - Provide the Educational Program Terms, including the essential design elements of the school model;
 - Provide evidence that the educational program or essential design elements of the program are based on proven methods. Provide evidence that the proposed educational program has a
-

sound base in research, theory, and/or experience, and has been or is likely to be rigorous, engaging, and effective for the anticipated student population; and

- Highlight the culturally responsive aspects of the program.

The Educational Program Terms identify the characteristics of the essential components of the educational program that the applicant considers critical to the school's success *and* for which the applicant is prepared to be held accountable to the Commission and the public. The Commission's oversight and evaluation of the proposed school's educational program will focus on successful implementation of the program's design elements and educational program terms. **Applicants should identify no fewer than three and no more than five Educational Program Terms.**

The Educational Program Terms should be *minimum* expectations. Applicants need not – and should not – include all of the things that they want the school to be. Rather, applicants should include a set of minimum measurable programmatic components that will enable the Commission to objectively validate that the program the proposed school is offering is fundamentally consistent with what the school is advertised to be.

Articulate the Educational Program Terms in a way that indicates the objective measurable evidence that can be used to determine whether the proposed school has met the expectations. Avoid general statements about the school culture or learning environment. **Focus on specific, measurable components** that will establish that culture or learning environment.

The Educational Program Terms will become an attachment to the charter contract. It will not replace the Commission's ultimate focus on performance standards set out in the Academic Performance Framework.

Note: The Educational Program Terms are different from *mission-specific goals* (Section 23) that the proposed school must develop as a part of its Academic Performance Framework, because Educational Program Terms focus on *process* rather than student *outcomes*. In other words, the mission-specific academic performance goals focus on what students will *achieve*. By contrast, the Educational Program Terms should capture the essentials of what students will *experience*. See the Commission's website for examples of Educational Program Terms.

Section 4: Curriculum and Instructional Design (2700 Words)

Propose a framework for instructional design that both reflects the needs of the anticipated population and ensures that all students will meet or exceed the state standards.

1. Describe the basic learning environment (e.g., classroom-based, independent study) and essential design elements, including class size and structure. Demonstrate alignment to the school's mission and vision. Include in your description how the learning environment is culturally responsive.
2. Give an overview of the planned curriculum. Identify course outcomes and demonstrate alignment with applicable state standards. Provide, as **Attachment 3**, a sample course scope and sequence for one subject in one grade of each division (elementary, middle, high school) the school will serve.
3. If the curriculum is fully developed, summarize curricular choices such as textbook selection, by subject, and the rationale for each. Describe the evidence that these curricula will be appropriate and effective for the anticipated student population. Describe how the curriculum is vertically and horizontally aligned for all grades the school will serve. Include a description of how the school developed a curriculum that is culturally responsive and free of bias (i.e. racial, gender, etc.).

-OR-

If the curriculum is not already developed, provide, as **Attachment 4**, a plan for how the curriculum will be developed between approval of the application and the opening of the school, including who will be responsible and when key stages will be completed. Describe how the curriculum will be vertically and horizontally aligned for all grades the school will serve; and how the curriculum will be appropriate and effective for the anticipated student population. Include a description of how the school will develop a curriculum that is culturally responsive and free of bias (i.e. racial, gender, etc.).

4. Describe the primary instructional strategies that the school will expect teachers to use, how these strategies are culturally responsive, and why they are well-suited for the anticipated student population.
5. Describe the processes, methods and systems teachers will have for providing differentiated instruction to meet the needs of all students.

Section 5: Student Performance Standards (1300 Words)

Responses to the following items regarding the proposed school's student performance standards must be consistent with Washington State K-12 Learning Standards.

1. Provide and describe how the school as a whole will meet the Washington State K-12 Learning Standards.

2. If the school plans to adopt or develop additional academic standards beyond the state standards, or non-academic standards, provide an explanation of the types of standards (content areas, grade levels). Be sure to highlight and describe how the proposed standards exceed the state standards.
3. Explain the school policies and standards for promoting students from one grade to the next. Describe how and when promotion and graduation criteria will be communicated in a culturally responsive manner to parents/guardians and students.
4. Provide, as **Attachment 5**, the school's exit standards for graduating students or students completing the last grade in that school. These exit standards should clearly set forth what students in the last grade served will know and be able to do, and meet or exceed all state grade level expectations.

Section 6: High School Graduation Requirements (High Schools Only) (700 Words)

High schools will be expected to meet the state graduation standards as established by the Washington State Board of Education (SBE).

1. Describe how the school will meet the requirements described in **Attachment 5**. Explain how students will earn credit hours, how grade-point averages will be calculated, what information will be on transcripts, and what elective courses will be offered. If graduation requirements for the school will exceed state standards, explain the additional requirements.
2. Explain how the graduation requirements will ensure student readiness for college or other postsecondary opportunities (e.g. trade school, military service, or entering the workforce).
3. Explain the systems and structures the school will implement for students at risk of dropping out and/or not meeting the proposed graduation requirements.

Section 7: School Calendar and Schedule (400 Words)

1. Describe the annual academic schedule for the school. Explain and demonstrate how the calendar reflects the needs of the educational program and meets Washington state minimum instructional requirements as stated in RCW 28A.150.220(2). In **Attachment 6**, provide the school's proposed calendar for the first year of operation, including the total number of instructional days and hours, holidays, make-up days in case of inclement weather, and state

assessment days. Provide the minimum number of hours/minutes per day and week that the school will devote to academic instruction in each grade. A definition of “Instructional Hours” is provided in RCW 28A.150.205. Provide, also in **Attachment 6**, a sample daily and weekly schedule for each division of the school. The application must provide the formula or calculation for the total annual number of instructional hours/days.

2. Describe the structure of the school day and week. Include the number of instructional hours/minutes in a day for core subjects, such as language arts, mathematics, science, and social studies as well as any school-specific educational program terms or design elements. Note the length of the school day, including start and dismissal times. Explain why the school's daily and weekly schedule will be optimal for student learning.

Section 8: School Culture (2000 Words)

1. Describe the culture of the proposed school. Explain how it will promote a positive and culturally inclusive academic environment and reinforce intellectual and social development for students.
2. Describe how the school will create and implement this culture for students, teachers, administrators, and parents/guardians starting from the first day of school. Describe the plan for enculturating students who enter the school mid-year.
3. Describe and demonstrate how the school culture will be culturally responsive and take account of and serve students with special needs, including students receiving special education services, English Language Learners (ELLs), and any students at risk of academic failure.
4. Describe a typical school day from the perspective of a student in a grade that will be served in the school's first year of operation.
5. Describe a typical instructional day for a teacher in a grade that will be served in the school's first year of operation.

Section 9: Supplemental Programming (700 Words)

1. If summer school will be offered, describe the program(s). Explain the schedule and length of the program, including the number of hours, days and weeks. Provide a description of the anticipated participants, including number of students and the methods used to identify them. Describe the anticipated resource and staffing needs for these programs and how they will be

funded. Address the processes for determining attendance when student interest/need exceeds capacity.

2. Describe any extra-curricular, co-curricular, or other student-focused activities or programming the school will offer, including how often they will occur, how they will be culturally responsive, and how they will be delivered and funded. Address the process when student interest in the program exceeds capacity. Applicant must describe how the school will pay for student participation in district sponsored interscholastic programs.
3. Describe the specific programs or strategies the school will employ to address mental, emotional, and social development and health for all students, and describe how these strategies will be culturally responsive.
4. Describe the plan for outreach to parents to apprise them of supplemental programming opportunities. Describe how this plan will be culturally inclusive.

Section 10: Special Populations and At-Risk Students (6000 Words)

Schools are responsible for hiring licensed and endorsed special education professionals pursuant to federal and state law. School personnel shall participate in developing Individualized Education Plans (IEPs), identify and refer students for assessment of special education needs, maintain records, and provide the delivery of special education instruction and services, as appropriate. All responses should indicate how the school will comply with applicable laws and regulations governing service to these student populations.

1. Describe the overall plan to serve students with special needs, including, but not limited to, students with IEPs or Section 504 plans, ELLs, students identified as intellectually gifted, and students at risk of academic failure or dropping out. The plan should address how the school will meet students' needs in the least restrictive environment.
2. Identify the special populations and at-risk groups that the school expects to serve and explain the basis for these assumptions. Discuss how the course scope and sequence, daily schedule, staffing plans, and support strategies and resources will meet or be adjusted for the diverse needs of all students.
3. Specifically explain how the school will identify and meet the learning needs of students with mild, moderate, and severe disabilities in the least restrictive environment possible. Specify the programs, strategies, and supports the school will provide, including the following:

- a. Methods for identifying students with special education needs and avoiding misidentification;
 - b. Specific scientifically research based interventions the school will provide to support the identification of needs for students with disabilities;
 - c. Specific instructional programs, practices, and strategies the school will employ to provide a continuum of placements and services, ensure students' access to the general education curriculum, and ensure academic, social, emotional, and functional success for students with special education needs;
 - d. Plans for monitoring and evaluating the academic, social, emotional, and functional performance progress and success of special education students with mild, moderate, and severe needs to ensure the attainment of each student's goals as set forth in the IEP;
 - e. Plans for developing, monitoring, and evaluating the progress and success of supports and services for students with disabilities as set forth in 504 Plans;
 - f. Plans for promoting graduation for students with special education needs (high schools only); and
 - g. Plans to provide adequate qualified staffing for the anticipated special needs population.
4. Explain how the school will meet the needs of English Language Learner (ELL) students, including the following:
- a. The charter school will identify and place English learners in the English language development program ([ESEA Sec. 8101 \(20\)](#));
 - b. The charter school will make available to all English learners a transitional bilingual instructional program or, if the use of two languages is not practicable as provided in WAC 392-160-040, an alternative instructional program ([WAC 392-160-010](#));
 - c. The charter school will monitor and evaluate the academic progress and success of English learners, including the exiting of students from EL services ([ESEA Sec. 3121\(a\)\(b\)\(c\)](#); and [RCW 28A.180.040\(g\)](#));
 - d. The charter school will provide adequate, qualified staffing for English learners ([Title VI of the Civil Rights Act of 1964, 34 CRR §100.3](#));
 - e. The charter school will meet the parent notification requirements for families of English learners ([WAC 392-160-015](#));
5. Explain how the school will meet the needs of homeless students and students in foster care.
6. Explain how the school will identify and meet the learning needs of at-risk students as defined in RCW 28A.710.010(2):

"At-risk student" means a student who has an academic or economic disadvantage that requires assistance or special services to succeed in educational programs. The term

includes, but is not limited to, students who do not meet minimum standards of academic proficiency, students who are at risk of dropping out of high school, students in chronically low-performing schools, students with higher than average disciplinary sanctions, students with lower participation rates in advanced or gifted programs, students who are limited in English proficiency, students who are members of economically disadvantaged families, and students who are identified as having special educational needs.

7. Describe how the school will identify and meet the needs of highly capable students, including the following:
 - a. Specific research-based instructional programs, practices, strategies, and opportunities the school will employ or provide to enhance their abilities;
 - b. Plans for monitoring and evaluating the academic progress and success of intellectually gifted students; and
 - c. Plans for providing qualified staffing for intellectually gifted students.

Section 11: Student Recruitment and Enrollment (600 Words)

1. Describe the school's plan for student recruitment and marketing and how it is culturally inclusive and will provide equitable access to interested students and families. Specifically describe the school's plan for outreach to at-risk students. The plan must adhere to admissions and enrollment practices outlined in RCW 28A.710.050
2. Provide, as **Attachment 7**, the school's enrollment policy, which should demonstrate cultural inclusiveness and include the following:
 - a. Tentative dates for application period and enrollment deadlines and procedures, including an explanation of how the school will receive and process Intent to Enroll forms;
 - b. A timeline and plan for student recruitment/engagement and enrollment;
 - c. The lottery procedures that will be used should student interest exceed capacity. These lottery procedures shall be publicly noticed and open to the public; however, the school must grant enrollment preference to siblings of already enrolled students, with any remaining enrollments allocated through the lottery;
 - d. If applicable, how the school will offer a weighted enrollment preference for at-risk students or children of full-time employees of the school; and
 - e. Policies and procedures for student waiting lists, withdrawals, reenrollment, and transfers.

Section 12: Student Discipline Policy and Plan (1500 Words)

1. Describe in detail the school's approach to student discipline. Provide, as **Attachment 8**, the school's proposed discipline policy. The proposed policy must be culturally responsive and

comply with any applicable state laws and Commission policies, including, but not limited to, RCW 28A.150.300. The plan should provide evidence that it is based on research, theory, experience, or best practice. The description of the school's approach and the proposed policy should address each of the following:

- a. Equitable and fair practices the school will use to promote good discipline, including both penalties for infractions and incentives for positive behavior;
- b. A list and definitions of the offenses for which students in the school must (where nondiscretionary) and may (where discretionary) be suspended or expelled, respectively;
- c. An explanation of how the school will take into account the rights of students with disabilities in disciplinary actions and proceedings;
- d. Highlight how the school will address potential disproportionate discipline rates based on race, ethnicity, gender, etc.; and
- e. Procedures for due process when a student is suspended or expelled as a result of a code of conduct violation, including a description of the appeal process that the school will employ for students facing expulsion and a plan for providing services to students who are expelled or out of school for any amount of time.

2. Describe how students and parents/guardians will be informed of the school's discipline policy.

Section 13: Educational Program Capacity (1200 Words)

1. Identify the key members of the school's leadership team. Identify only individuals who will play a substantial and ongoing role in school development, governance and/or management, and will thus share responsibility for the school's educational success. These individuals may include current or proposed governing board members, school leadership/management, and any essential partners who will play an important ongoing role in the school's development and operation.
2. Describe the team's individual and collective qualifications for implementing the school design successfully, including capacity in areas such as:
 - a. School leadership, administration, and governance;
 - b. Curriculum, instruction, and assessment;
 - c. Performance management;
 - d. Cultural competence/inclusiveness;
 - e. Family and community engagement; and
 - f. Special populations.

3. Specifically describe the applicant's ties to and/or knowledge of the proposed community that the school will serve.
4. Identify any organizations, agencies, or consultants that are partners in planning and establishing the school, along with a brief description of their current and planned roles and any resources they have contributed or plan to contribute to the school's development.
5. Identify the principal/head of school candidate and explain why this individual is well qualified to lead the proposed school in achieving its mission. Summarize the proposed leader's academic and organizational leadership record. Provide specific evidence (i.e. student performance data, etc.) of the leader's ability to effectively serve the anticipated population. Discuss the evidence that demonstrates capacity to practice cultural competency and design, launch, and manage a high-performing charter school. If the proposed leader has never run a school, describe any leadership training programs or other relevant leadership roles in which they have served, completed or participated. Provide, as **Attachment 9**, the qualifications and resume for this individual.

—OR—

If no candidate has been identified, discuss the process and timeline for recruiting, selecting, and hiring the school leader. Describe the criteria to be used in selecting this leader, and provide, as **Attachment 9**, a job description and qualifications for the school leader and a plan for recruiting and hiring a strong and compatible leader.

6. Describe the responsibilities of the school's leadership/management team beyond the principal/head of school. If known, identify the individuals who will fill these positions. For any positions not yet filled, provide a timeline, criteria, and process for recruitment and hiring. Please describe how this plan for recruitment and hiring will be culturally inclusive. Provide, as **Attachment 10**, the qualifications and resumes for the identified members of the leadership team, and for each position not yet filled, include job descriptions and qualifications.
7. Describe in detail who is currently working or who will work on a full-time or nearly full-time basis following approval of the charter to lead development of the school and the plan to compensate these individuals.

CATEGORY 4: OPERATIONS PLAN AND CAPACITY

Section 14: Legal Status and Governing Documents (750 Words)

1. Describe the proposed school's legal status, including nonprofit status and federal tax-exempt status.
2. Submit, as **Attachment 11**:
 - a. Articles of Incorporation;
 - b. Proof of nonprofit status and tax-exempt status (or copies of filings for the preceding items or other evidence);
 - c. Bylaws;
 - d. Board Chair signed Statement of Assurances; and
 - e. Other governing documents already adopted.
3. Describe any subsidiaries owned or affiliated with the nonprofit submitting this charter school application. Describe any other organizational/business endeavors in which the nonprofit that is submitting this charter school application is involved.
4. If the applicant does not already operate one or more schools, including charter management organizations (CMOs), as well as applicants proposing to contract with ESPs, please describe organization's five-to-ten-year growth plan regarding the total number of charter schools it hopes to operate in Washington State. Include discussion of the organization's capacity to successfully support and execute that plan, including business plans to support anticipated growth.

Section 15: Organization Structure and Partnerships (500 Words)

1. Submit, as **Attachment 12**, organization charts that show the school governance, management, staffing plan, and structure in:
 - a. The first year of school operations;
 - b. At the end of the 5-year charter term; and
 - c. When the school reaches full capacity, if in a year beyond the first charter term.

Each organization chart must clearly delineate the roles and responsibilities of and lines of authority and reporting among the governing board, school leader, management team, staff,

any related bodies (such as advisory bodies or parent/teacher councils), and any external organizations that will play a role in managing the school. The organization charts should also document clear lines of authority and reporting within the school.

2. Describe any other proposed or existing partnerships or contractual relationships that will be central to the school's operations or mission. Provide, as **Attachment 13**, copies of the proposed contract(s). Be sure to address and describe any services to be contracted, such as business services, payroll, auditing services, program management, and professional development, including the anticipated costs and criteria for selecting such service.

Section 16: Governing Board (2200 Words)

1. Describe the governance philosophy that will guide the board, including the nature and extent of involvement by key stakeholder groups.
2. Describe the governance structure of the proposed school, including the primary roles of the governing board and how it will interact with the principal/head of school and any advisory bodies. Describe the size, current and desired composition, powers, and duties of the governing board. Identify key skills, areas of expertise, and constituencies that will be represented on the governing board.
3. Explain how this governance structure and composition will help ensure that:
 - a. The school will be an educational, financial and operational success;
 - b. The board will evaluate the success of the school, school leader and itself;
 - c. There will be active and effective representation of key stakeholders, including parents; and
 - d. The school will be a culturally responsive education system.
4. For each current and proposed board member identified in Category 1 Section D (Board Member Roster), summarize each member's desire to serve on the school's board and qualifications for holding this position. In **Attachment 14**, provide the following documents for each individual identified:
 - a. Completed and signed Board Member Information Form;
 - b. Board member resume
5. In **Attachment 15**, provide a signed Initial Background Check Certification form to verify that a background check has been initiated and will be completed within the timetables set forth in the Sample Contract: Attachment 1, Pre-Opening Process and Conditions for each board member and school leader,

6. Explain the procedure by which board members have been and will be selected. Describe how often the board meets. Discuss the plans for any committee structure.
7. Describe plans for increasing the capacity of the governing board. Discuss how the board will expand and develop over time. Describe how new members will be recruited and added, and how vacancies will be filled. Describe the orientation or training new board members will receive, and the kinds of ongoing development/training existing board members will receive. The plan for training and development should include:
 - a. A timetable/schedule;
 - b. Specific topics to be addressed;
 - c. Participation requirements; and
 - d. Development of cultural competence.
8. If the current applicant team does not include the formal school governing board, explain how and when the transition to the formal governing board will take place.
9. If this application is being submitted by an existing nonprofit organization whose core mission is NOT the operation of charter schools, respond to the following:
 - a. Indicate whether the existing nonprofit board governs the new school;
 - b. To what extent the school will be a new nonprofit corporation governed by a separate board;
 - c. If the current nonprofit's board will govern the charter school, describe the steps taken to transform its board membership, mission, and bylaws to assume its new duties as a charter public school board. Describe the plan and timeline for completing the transition and orienting the board to its new duties; and
 - d. If a new board has been formed, describe what, if anything, its ongoing relationship to the existing nonprofit's board will be. This should also be represented on the applicant's organizational chart.
10. Describe the board's ethical standards and procedures for identifying and addressing conflicts of interest. Provide, as **Attachment 16**, the board's proposed:
 - a. Code of Ethics Policy; and
 - b. Conflict of Interest Policy.
11. Identify any existing relationships that could pose actual or perceived conflicts if the application is approved. Discuss specific steps that the board will take to avoid any actual or perceived conflicts.

Section 17: Advisory Bodies (300 Words)

Describe any school advisory bodies or councils to be formed, including the role(s), duties, and authority of each. Describe the planned composition of the advisory body and the strategy/selection process for achieving that composition; the role of parents/guardians, students, and teachers (as applicable); and the reporting structure as it relates to the school's governing body and leadership.

Section 18: Grievance/Complaint Process (750 Words)

Describe in detail the established school process for resolving public complaints, including complaints regarding curriculum and/or parent or student objections to a governing board policy or decision, administrative procedure, or practice at the school, or the school leader and/or principal's performance. The process should include how the final administrative appeal is heard by the governing board.

Section 19: District Partnerships (300 Words)

Describe any district partnership activities and/or meetings during the application development process. If applicable, provide any proposed partnership agreement between the proposed charter school and the school district where the school is proposed to be located. Include the terms of that agreement and/or partnership. As applicable provide, as **Attachment 17**, Memorandum of Understanding (MOU) or other partnership documentation (i.e. letters of support/partnership, etc.).

Section 20: Education Service Providers (ESP) and Other Partnerships (300 Words)

1. If the school intends to contract with an ESP for the management of the school for substantial educational services, address the following:
 - a. Provide evidence of the nonprofit ESP's success in serving student populations that are similar to the anticipated population, including demonstrated academic achievement, as well as successful management of nonacademic school functions, if applicable;
 - b. As **Attachment 18**, provide a term sheet that includes:
 - i. Proposed duration of the service contract;
 - ii. Roles and responsibilities of the governing board, school staff, and ESP;
 - iii. Scope of services and resources to be provided by the ESP;
 - iv. Performance evaluations measures and timelines;
 - v. Compensations structure, including clear identification of all fees to be paid to the ESP;
 - vi. Methods of contract oversight and enforcement;
 - vii. Investment disclosure; and
 - viii. Conditions for renewal and termination of the contract.

2. Disclose and explain any existing or potential conflicts of interest between the charter school board and proposed service provider or any affiliated business entities.

Section 21: Staffing Plans, Hiring, Management, and Evaluation (2500 Words)

1. Describe the relationship that will exist between the proposed charter school and its employees, including whether the employees will be at-will and whether the school will use employment contracts. If the school will use contracts, explain the nature and purpose of the contracts.
2. Outline the proposed school's salary ranges and employment benefits for all employees, as well as any incentives or reward structures that may be part of the compensation system. Explain the school's strategy for retaining high-performing teachers.
3. Describe the school's strategy, plans, and timeline for recruiting and hiring the teaching staff, in accordance with the state rules and regulations regarding staff qualifications and accountability plan. Explain how this plan includes culturally inclusive hiring practices. Explain other key selection criteria and any special considerations relevant to the school's design.
4. Outline in detail the school's procedures for hiring and terminating school personnel, including the process and timeline for conducting criminal background checks.
5. Provide, as **Attachment 19**, a completed staffing chart for the school, prepared using the template provided by the Commission. The staffing chart and accompanying notes or roster should identify the following:
 - a. Year one positions, as well as positions to be added during the five (5) year charter contract;
 - b. Administrative, instructional, and non-instructional personnel;
 - c. The number of classroom teachers, paraprofessionals, and specialty teachers; and
 - d. Operational and support staff;
 - e. And a description of the supervisory and/managerial relationships that exist between the school's senior-level administrative team and the rest of the staff.
6. Provide the teacher-student ratio, as well as the ratio of total adults to students for the school.
7. Explain how the school leader will be evaluated each school year. Provide, as **Attachment 20**, any leadership evaluation tool(s) that the applicant team has identified or developed already.

8. Explain how teachers will be evaluated each school. Provide, as **Attachment 21**, any teacher evaluation tool(s) that already exist for the school, or state if the school intends to follow the state teacher evaluation plan.

Section 22: Professional Development (1200 Words)

Describe the school's teacher and staff professional development expectations and opportunities, including the following:

1. Identify the person, position, or organization responsible for professional development.
2. Describe in detail the core components of teacher and staff professional development and how these components will support effective implementation of the proposed educational program. Please describe how the professional development plan will include the development and practice of cultural competence for all staff, as well as staff capacity in the collection, analysis and use of performance data to improve student learning and evaluate the school's culture and climate. Discuss the extent to which the professional development will be conducted internally or externally and will be individualized or uniform.
3. Provide, as **Attachment 22**, a schedule and description of any specific professional development that will take place prior to school opening. Provide a detailed description of what will be addressed during this induction period and how teachers will be prepared to deliver any unique or particularly challenging aspects of the curriculum and instructional methods. Include safety and child abuse training.
4. Describe the expected number of days/hours for professional development throughout the school year, and explain how the school's calendar, daily schedule, and staffing structure accommodate this plan. Include time scheduled for common planning or collaboration in this discussion and specify how this time will typically be used.

Section 23: Performance Framework (1000 Words)

The Commission will evaluate the performance of every charter school annually and for renewal purposes according to the Performance Framework. Per Washington Administrative Code (WAC) 108-30, the Performance Framework is a set of academic, financial, and organizational performance standards. The academic performance standards will consider proficiency, growth, and comparative performance based on federal, state accountability measures, and attainment of mission-specific goals. The financial performance standards will be based on standard accounting principles and industry standards for sound financial operation. The organizational performance standards will be based primarily on

compliance with legal obligations, including fulfillment of the governing board’s fiduciary obligations related to sound governance.

Applicants must propose to supplement the Commission’s Performance Framework measures with school and mission-specific academic and organizational goals. The Commission encourages applicants to closely examine the Performance Framework, and they are invited to incorporate the Performance Framework into their educational and organizational performance systems.

1. Provide, as **Attachment 23**, a completed mission-specific goals form with the school’s mission-specific **academic and organizational** goals and targets. Provide 1-3 goals **each** for academics and 1-3 goals for organizational effectiveness. State goals clearly in terms of the measures or assessments the school plans to use. All goals must be specific, measurable, action oriented, realistic, relevant, and time-bound.
2. In addition to all mandatory state assessments, identify the primary interim and/or formative assessments the school will use to assess student learning needs and progress throughout the year. Explain how these interim assessments align with the school’s educational program, performance goals, and state standards. Be sure to address how the school will participate in all state required assessments.
3. If applicable, address how the school proposes to provide, at a minimum, summative norm-reference or criterion-based assessment data which demonstrates student growth and proficiency for students in grade levels not assessed by the state (i.e. K through grade 2 or High School grades).
4. Describe in detail how the school will measure and evaluate academic progress (of individual students, student cohorts, and the school as a whole) throughout the school year, at the end of each academic year, and for the term of the charter contract.
5. Describe how the school will collect and analyze student academic achievement data, use the data to refine and improve instruction, and report the data to the school community. Identify the person(s), position(s), and/or entities that will be responsible and involved in the collection and analysis of assessment data.
6. Identify the person(s) or position(s) and/or entities responsible for managing the data, including collection, disaggregation, and analysis of all assessment data **with and for classroom teachers**.

Section 24: Facilities (800 Words)

Charter school facilities must comply with applicable state and local health and safety requirements. In addition, charter school applicants must be prepared to follow applicable city planning review procedures.

1. Describe the basic facilities requirements for accommodating the school as proposed, including number of classrooms, square footage per classroom, common areas, overall square footage, and amenities.
2. Explain anticipated specialty classroom needs, including the number of each type and the number of students to be accommodated at one time. Specialty needs may include, but are not limited to, the following: science labs, art rooms, computer labs, a library/media center, performance/dance rooms, auditorium, etc.
3. Describe anticipated administrative/support space needs, including anticipated number of each: main office, satellite office, work room/copy room, supplies/storage, teacher work rooms, etc.
4. Explain which, if any, of the following are essential to fulfillment of the core athletic program: gymnasium, locker rooms, weight rooms, field(s) (football, soccer, multipurpose), baseball/softball field, etc.
5. Identify any other significant facilities needs not already specified, for example: Americans with Disabilities Act (ADA) accessibility requirements, playground, large common space, other special considerations (identify and explain).
6. Describe the steps already taken to identify prospective facilities, as well as the process for identifying and securing a facility, including any brokers or consultants the applicant is employing to navigate the real estate market, plans for renovations, timelines, financing, etc.
7. If the applicant currently holds a facility or has an MOU or other proof of intent to secure a specific facility, briefly describe the facility, including location, size, and amenities.
 - a. Provide proof of the commitment as **Attachment 24**.
 - b. **Attachment 24** may also include up to 10 (ten) pages of supporting documents providing details about the facility.

Section 25: Start-Up and Ongoing Operations (1400 Words)

1. Provide, as **Attachment 25**, a detailed start-up plan for the school, specifying tasks, timelines, and responsible individuals. This plan should align with the start-up budget.
2. Describe the school transportation plan and arrangements for prospective students. In addition to daily transportation needs, describe how the school plans to meet transportation needs for field trips and athletic events.
3. Summarize the plan for safety and security for students, the facility, and property, and how that plan complies with all federal, state, county, and city health and safety laws. Explain the types of security personnel, technology, equipment, and policies that the school will employ.
4. Outline the plans for food service and other significant operational or ancillary services.
5. Provide, as **Attachment 26**, a list of the types of insurance coverage the school will secure, including a description of the levels of coverage. Types of insurance include, but are not limited to, workers' compensation, unemployment compensation, general liability, property, indemnity, directors and officers, motor vehicle, and errors and omissions. Applicants should ensure that they have the coverage identified in the sample contract (§ 13.1).

Section 26: Operations Capacity (800 Words)

1. Describe the applicant team's individual and collective qualifications for implementing the Operations Plan successfully, including capacity in areas such as the following:
 - a. Staffing;
 - b. Professional development;
 - c. Performance management;
 - d. General operations;
 - e. Facilities management; and
 - f. State and Federal compliance.
2. Describe the organization's capacity and experience in facilities acquisition and management, including managing build-out and/or renovations, as applicable.

CATEGORY 5: FINANCIAL PLAN AND CAPACITY

Section 27: Financial Plan (2600 Words)

1. Describe the systems, policies, and processes the school will use for financial planning, accounting, purchasing, and payroll, including a description of how it will establish and maintain strong internal controls and ensure compliance with all financial reporting requirements.
 2. Describe the roles and responsibilities of the school's administration and governing board for school finances and distinguish between each.
 3. Describe the school's plans and procedures for contracting for an annual independent audit of the financial operations of the school.
 4. Describe how the school will ensure financial transparency to the Commission and the public, including its plans for public adoption of its budget and public dissemination of its annual audit and an annual financial report.
 5. Submit a completed Financial Plan Workbook (Commission Template), as **Attachment 27**. Be sure to complete all sheets in the Workbook. In developing the budget, please use the per-pupil revenue estimator tool and allocation estimate guidance provided by the Commission.
 6. As **Attachment 28**, present a detailed budget narrative, including description of assumptions and revenue estimates that includes, but is not limited to, the basis and calculations for revenue projections (including inflation for General Apportionment), staffing levels, and expenditures. The narrative response should specifically address the degree to which the school/campus budget will rely on variable income (e.g., grants, donations, fundraising). The budget narrative should include the following:
 - a. Anticipated funding sources: Indicate the amount and sources of funds, property or other resources expected to be available through banks, lending institutions, corporations, foundations, grants, etc. Describe any restrictions on access to, or use of, any identified funding sources. Include evidence of commitment for any funds on which the school's core operation depends;
 - b. Discuss the school's contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated;
-

- c. Describe in detail the year one cash flow contingency, in the event that revenue projections are not met in advance of opening, and
 - d. Provide, as **Attachment 29**, evidence of philanthropic funding commitments.
- 7. Provide, as **Attachment 30**, the school's long-term fundraising plan. Be sure to include specifics about the timeline as well as the person responsible for each task. The plan should describe how the school will sustain any necessary fundraising, who will take the lead in implementing the plan, and how board members will be engaged in fundraising and plan implementation.

Section 28: Financial Management Capacity (500 Words)

- 1. Describe the applicant team's individual and collective qualifications for implementing the Financial Plan successfully, including capacity in areas such as the following:
 - a. Financial management;
 - b. Fundraising and development; and
 - c. Accounting and internal controls.
- 2. Provide, as **Attachment 31**, the most recent internal financial statements, including balance sheets and income statements for the organization and any related business entities. Be sure that the school level and overall operations are distinctly represented.
- 3. For the organization as a whole and any related business entities, provide, as **Attachment 32**, the last three years of independent financial audit reports and management letters.

CATEGORY 6: EXISTING OPERATORS

Section 29: Existing Operators or Proposed Charter Management Organization Development (2700 Words)

Applicants who already operate one or more schools, including charter management organizations (CMOs), or applicants who plan to grow into their own CMO must respond to the following:

1. Provide a detailed description of the organization's growth plans and capacity to successfully support and execute that plan, including business plans to support anticipated growth. The description must also include the organization's overall growth plan regarding the total number of charter schools it hopes to operate in Washington State.
2. Using the Portfolio Summary Template, complete all requested information for each of the organization's schools and provide as **Attachment 33**.
3. For applicants authorized to open a school in the 2017 school year and beyond, **whether by the Commission or another authorizer**, provide a status report regarding compliance with each preopening condition.
4. Disclose any schools that have been closed or non-renewed, or charters that have been revoked by any authorizer.

CATEGORY 7: OPTIONAL CHARTER SCHOOL PROGRAM PLANNING AND IMPLEMENTATION SUBGRANT

Background

Authorized by Title V, Part B of the Elementary and Secondary Education Act (ESEA) (P.L. 107-110), the federal Charter Schools Program (CSP) provides funding to State Educational Agencies (SEA) with the purpose to increase national understanding of the charter school model and expand the number of high-quality charter schools available to students across the nation by providing financial assistance for planning, program design, and initial implementation of new charter schools, and to evaluate the effects of charter schools, including their effects on students, student academic achievement, staff, and parents.

The Office of Superintendent of Public Instruction (OSPI) was awarded a competitive CSP grant under this federal program for \$6,973,743. In order to improve efficiency, OSPI's federally approved grant application proposed that the New Charter School Application for both the Washington State Charter Schools Commission (Commission) and approved school district authorizers will serve as the application for CSP subgrants. This portion of the New Charter School Application was designed to minimize redundancies in application preparation as both the CSP and New School Application require similar information.

While the New Charter School Application will serve as the application for the CSP subgrant, the authorization of a charter school by a Washington charter school authorizer *does not* guarantee OSPI's approval of a CSP subgrant award. Additionally, the OSPI CSP grant management staff will conduct its own independent review to determine eligibility of potential subgrantees, the proposed subgrant specific goals, budgets, and line items.

Note: This section of the New Charter School Application is an **optional** section. Completion or non-completion does not contribute to the overall review or recommendation of an application. In order to receive a CSP planning and/or implementation subgrant, a school must first be authorized, have their charter contract signed by the authorizer, and have an approved affirmative motion by the charter school's board accepting the terms of the the CSP Statement of Assurances (Attachment 34). Subgrantees are required to work directly with OSPI's CSP grant management staff in order to comply with all processes and procedures of the CSP grant, and are subject to additional oversight and reporting requirements specific to the CSP grant.

Purpose of the CSP Grant

The Office of Superintendent of Public Instruction (OSPI) has received a competitive grant under this federal program to carry out the following objectives:

Objective 1: Increase and sustain the number of new, high-quality charter schools in Washington state through sub-grants for planning, program design and implementation.

Objective 2: Increase the number of high-quality charter school seats by enhancing the capacity of charter school leaders and board members at new and existing charter schools.

Objective 3: Increase the quality of the state’s charter school authorizer infrastructure through technical assistance, training, and access to necessary resources.

The Washington SEA CSP grant offers two types of subgrant awards:

- a. One-year *planning and design* of the new charter school educational program subgrants, and
- b. Up to two-year *initial implementation* of the new charter school subgrants.

Washington CSP Sub-grant Awards CSP Grant Period (2016-2019)				
Award Type	Planning and Design	Year 1 Implementation	Year 2 Implementation	Total Possible Funds Awarded per School
Amount	\$200,000 (1 year only)	\$305,000	\$280,000	\$785, 000 (Not to exceed \$800,000)

OSPI’s Charter School Program Grant expires on September 30, 2019. Continued funding beyond this date requires the approval of an annual “No Cost Extension” by the US Department of Education. OSPI intends to apply for and anticipates approval of this extension, but applicants should understand that continued funding of subgrants is dependent upon this approval.

Uses of Funds

The CSP Grant is a reimbursement program, which means recipients will be reimbursed following proof of spending on allowable, approved activities.

Under the allowable activities described in the ESEA, Title V, Part B, Section 5204(f)(3), grant funds must be used for the following:

- A. Post-award planning and design of the educational program, including refining results (standards) and measurements (evaluation) of progress toward those results.
- B. Research-based professional development for teachers and other staff that includes National Staff Development standards.

- C. Initial implementation of the charter school including:
- i. Informing the community about the school,
 - ii. Acquiring necessary equipment and educational materials and supplies,
 - iii. Acquiring, developing or aligning curriculum, and
 - iv. Other initial operational costs that cannot be met from State or local sources.

Additionally, applicants are responsible for obtaining and reviewing the Federal CSP Regulations and Guidance. Applicants are also responsible for being aware of the following relevant provisions: January 2014 CSP Nonregulatory Guidance; 2 CFR Part 180; Non-procurement Debarment And Suspension as adopted at 2 CFR Part 3485; Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards under 2 CFR Part 200 as adopted at 2 CFR Part 3474 (BLOCK 8); and 34 CFR Parts 75, 77, 79, 81, 82, 84, 86, 97, 98, 99 (Education Department General Administrative Regulations, EDGAR).

Eligibility

All applicants must have been authorized by the Commission in order to be eligible to receive Washington State CSP Grant funds. Additionally, applicants must demonstrate that they meet the following federal definition of a public “charter school” in the ESEA (P.L. 107-110, Section 5210(1)):

- A. In accordance with a specific State statute authorizing the granting of charters to schools, is exempt from significant State or local rules that inhibit the flexible operation and management of public schools, but not from any rules relating to the other requirements outlined in subsequent paragraphs below;
- B. Is created by a developer as a public school, or is adapted by a developer from an existing public school, and is operated under public supervision and direction;
- C. Operates in pursuit of a specific set of educational objectives determined by the school’s developer and agreed to by the authorized public chartering agency;
- D. Provides a program of elementary or secondary education, or both;
- E. Is nonsectarian in its programs, admissions policies, employment practices, and all other operations, and is not affiliated with a sectarian school or religious instruction;
- F. Does not charge tuition;
- G. Complies with the Age Discrimination Act of 1975, Title VI of the Civil Rights Act of 1964, Title IX of the Education Amendments of 1972, Section 504 of the Rehabilitation Act of 1973, Title II of the Americans with Disabilities Act of 1990, as amended, and Part B of the Individuals with Disabilities Education Act;
- H. Is a school to which parents choose to send their children, and that admits students on the basis of a lottery, if more students apply for admission than can be accommodated;
- I. Agrees to comply with the same Federal and State audit requirements as do other elementary and secondary schools in the State, unless such requirements are specifically waived for the purpose of this program;
- J. Meets all applicable Federal, State, and local health and safety requirements;

- K. Operates in accordance with State law; and
- L. Has a written performance contract with the authorized public chartering agency in the State that includes a description of how student performance will be measured pursuant to state assessments that are required of other schools and pursuant to any other assessments mutually agreeable to the authorized public chartering agency and the charter school.

The school must provide to OSPI the executed charter contract between the school and its authorizer, in addition to the school's enrollment policies to ensure that all relevant documents and practices comply with the federal definition and requirements of a charter school.

Verification Prior to Subgrant Application Approval

Prior to a final approval of a subgrant application, the Charter School Program Grant Coordinator will verify, with the US Department of Education that the applicant has not previously received a CSP grant.

Technical Assistance and Professional Development

All subgrantees agree to participate in technical assistance (TA) and professional development (PD) as a condition of the CSP subgrant award. The goal of this training is to support subgrantees as they implement and manage their subgrant to ensure compliance with the terms set forth in this application. Trainings may be provided in conjunction with other TA and PD provided by OSPI and charter school authorizers as part of a school's pre-opening conditions, onboarding process, or ongoing compliance with a charter contract. Additional subgrant specific training may also be required. Training topics may include operational processes, board and staff development, subgrant compliance, data systems, and reporting requirements. Notifications will be sent out in advance and every effort will be made to accommodate the subgrantee's availability. Application for subgrant funds indicates acknowledgment and consent to these requirements.

CSP Subgrant Monitoring

OSPI is committed to providing rigorous fiscal and programmatic monitoring of subgrantees to ensure the proper use of public funds. The importance of adhering to the following monitoring and compliance activities cannot be overstated. Failure to fulfill the requirements may lead to the denial of reimbursement funds or the rejection of continued funding of the subgrant.

The OSPI grants management staff provides monitoring of subgrantees. This process includes, but is not limited to:

- The grant management staff reviews and approves each subgrant budget in iGrants prior to release of grant funds.
- Monthly & Quarterly Progress Report submissions that include expenditure documentation, subgrantee progress towards grant project goals and objectives, and authorizer oversight including any concerns or corrective actions.

- Mid-year fiscal Desk Review protocols may include review of subgrantee expenditure documentation and requests, inventory, amounts reported (allocations, cash receipts, monthly and total expenditures, and current accruals and obligations), and financial transparency compliance.
- Timely drawdown of subgrant funds is monitored on a quarterly basis at minimum.
- Budget revisions are reviewed and approved through iGrants.
- School Finance and Operations are reviewed as part of the Year 2 Implementation site visit.
- Grant management concerns and any corrective actions required are reported to the subgrantee's fiscal manager and authorizer.

Elements of OSPI programmatic monitoring include:

- A Year End Progress Report is required after every year of the CSP subgrant award year. The progress report describes the subgrantee's progress toward its subgrant project goals and objectives, reporting on subgrant expenditures, and school operations.
- A site visit by the CSP grant management staff to review progress toward subgrant goals, observe the educational program, confirm statutory compliance, discuss eligibility for and receipt of federal funds/programs, provide awareness of CSP grant requirements, certifications, and assurances.
- Review of charter documents and performance data.
- Any complaints, concerns, or findings brought to the attention of either charter authorizers or OSPI are investigated by OSPI and reported to the subgrantee and its authorizer, along with any suggested Technical Assistance and/or required corrective action.
- The Final CSP Subgrant Report is a programmatic monitoring element. The report includes final reporting of expenditures, EDGAR-compliant asset inventory, and progress toward Grant Project Goals and project objectives, including educational outcomes.

Use of Weighted Enrollment Preferences

In the event a subgrant applicant plans to use or establish weighted enrollment preferences (also known as a weighted lottery) during their funding cycle, the school must submit a proposal, in advance, that is consistent with state and federal regulations, and receive approval by their authorizer, Commission, OSPI CSP Grant management staff, and the US Department of Education in order to maintain eligibility for a subgrant award or renewal. Failure to comply with this requirement may result in the loss or renewal of this subgrant.

Please note that RCW 28A.710.050 requires that weighted enrollment preferences must be approved by the *Commission* regardless of the school's authorizer.

(3) If capacity is insufficient to enroll all students who apply to a charter school, the charter school must grant an enrollment preference to siblings of enrolled students, with any remaining

enrollments allocated through a lottery. A charter school may offer, pursuant to an admissions policy approved by the commission, a weighted enrollment preference for at-risk students or to children of full-time employees of the school if the employees' children reside within the state.

Subgrantees must submit their weighted enrollment request to their authorizer and to the Commission in writing. Once approval is obtained by both, the subgrantee will then work with the CSP Grant Coordinator to submit an official waiver to the US Department of Education. The waiver process can take time and may require multiple revisions. It is the responsibility of the subgrantee to allow for adequate time for all levels of approval. For that reason, it is suggested that subgrantees begin this process well in advance of their proposed enrollment period and scheduled lottery date.

Award Process

Following the review of each subgrant application and authorization process, including the execution of a charter contract, award notification emails will be sent to applicants informing them of their award status. The notification may include a request for additional information which must be provided within 30 days. Once the final review is completed, the OSPI CSP grant management staff will provide necessary fiscal documents and instructions on the reimbursement process for the grant. Funds must not be spent or encumbered until the grant has received final approval. The approximate award date is September 1, 2019.

All goals and objectives stated in the application must be completed in the allowed budget period.

Section 30: OPTIONAL Charter School Planning and Implementation Subgrant (1500 Words)

CSP Application Requirements

1. Provide specific CSP subgrant goals and objectives (no more than 5). State goals and objectives clearly in terms of the measures or assessments the school plans to use evaluate progress. All goals must be specific, measurable, action oriented, realistic, relevant, time-bound, and include targets. Goals may be similar or identical to the school's mission-specific goals, however, they must directly correspond to the proposed subgrant budget line items;
2. A description of how the subgrant funds will be used, including a description of how such funds will be used in conjunction with any other federal programs administered by the US Department of Education;
3. A description of how the charter school will continue operation once the federal grant has expired;

4. A description of the administrative relationship between the charter school and the charter school's authorizer and the charter school and the CMO (if applicable).

In addition to the above requirements, to initially apply for this one-time planning grant, applicants must provide for the purposes of Section 30 of this application:

- **Attachment 34**, a signed CSP grant Statement of Assurances
- **Attachment 35**, the OSPI Project Budget Form and Budget Narrative with a line item detail of proposed expenditures. Applicants are expected to read the *General Budget Guidelines & Restrictions* in order to prepare these documents.

For questions or assistance with regards to *this* section of the New School Grant Application, please contact Casey Caronna, CSP Grant Coordinator at: casey.caronna@k12.wa.us.

Attachment 12: Charter Public School Application



CATALYST: BREMERTON

Application for New Charter School to Open Fall 2020

Submitted by Amanda Gardner and Tatiana Epanchin
On behalf of the Board of Directors

March 1, 2019

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CATEGORY 1: GENERAL INFORMATION
CHARTER SCHOOL COMMISSION APPLICATION COVER SHEET

Section A: School Information			
Name of School:	Catalyst: Bremerton		
School Type (Bold One):	Elementary, Elementary/Middle , Middle, Junior High, Middle/High, High		
Grades Served:	K-8		
School District:	Bremerton School District	Neighborhood/Community	Bremerton, WA
Phone Number:	<i>day and evening</i>	360.453.7085	
Fax Number:	N/A	Email:	amanda@catalystpublicschools.org
Website Address:	www.catalystpublicschools.org		
Street Address:	210 South Hudson Street, Suite 324, Seattle, WA, 98134		
Sponsoring Entity (Bold One):	Nonprofit Organization, Governmental, College or University, State Board of Education		
Open Date:	August 19, 2020	Contracted Education Service Provider (EMO, CMO, Other):	Catalyst Public Schools
Calendar Type (Standard or Extended School Year):	Extended School Year	Number of Instructional Days:	185

Section B: Primary Contact Person			
Name:	Amanda Gardner	Position:	Co-Founder
Address	210 South Hudson Street, Suite 324, Seattle, WA, 98134		
Mobile Phone:	360.453.7085	Alternate Phone:	617.233.4226

Email:	amanda@catalystpublicschools.org	Current Employer:	Innovate Public Schools
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Section C: Enrollment Projections												
Grade Level	Year 1		Year 2		Year 3		Year 4		Year 5		At Capacity 504	
	Min.	Max	Min.	Max	Min.	Max	Min.	Max	Min.	Max	Min.	Max
K	56	56	56	56	56	56	56	56	56	56	56	56
1	56	56	56	56	56	56	56	56	56	56	56	56
2			56	56	56	56	56	56	56	56	56	56
3					56	56	56	56	56	56	56	56
4					56	56	56	56	56	56	56	56
5	56	56	56	56	56	56	56	56	56	56	56	56
6	56	56	56	56	56	56	56	56	56	56	56	56
7			56	56	56	56	56	56	56	56	56	56
8					56	56	56	56	56	56	56	56
9												
10												
11												
12												
Total	224	224	336	336	448	448	504	504	504	504	504	504

Section D: Board Members				
<i>Name</i>	<i>Title on Board</i>	<i>Contact Information (Phone and Email)</i>	<i>Mailing Address</i>	<i>Current Employer</i>
Julie Kennedy	President/Chair	917-617-2724 Julie.trott@gmail.com	117 NW 82nd Street Seattle, WA 98117	Charter School Growth Fund
Amy Kiyota	Vice President/Chair	443.934.8705 amy.kiyota@gmail.com	4824 S. Kenny Street Seattle, WA 98112	Impact Public Schools
TyKera Williams	Board Member	(410) 463-9857 Willi272@seattleu.edu	3845 NW Fairway Lane, Bremerton, WA 98312	University of Washington Medical Center
Katie Singh	Board Member	415.722.1434	3908 Briarcliff Lane West Seattle, WA 98199	Urban Schools Human Capital Academy

Section E: Start-Up Team Members				
<i>Name</i>	<i>Title/Position on Start-Up Team</i>	<i>Contact Information (Phone and Email)</i>	<i>Mailing Address</i>	<i>Current Employer</i>
Tatiana Epanchin	Co-Founder	tatiana@catalystpublicschools.org 360.453.7085	210 South Hudson Street, Suite 324, Seattle, WA, 98134	School Leader Lab
Amanda Gardner	Co-Founder	amanda@catalystpublicschools.org 360.453.7085	210 South Hudson Street, Suite 324, Seattle, WA, 98134	Innovate Public Schools

CATEGORY 2: EXECUTIVE SUMMARY

Section 1: Executive Summary

Catalyst: Bremerton (Catalyst), the first site of Catalyst Public Schools, will serve 504 scholars in grades K-8 in Bremerton and its surrounding area. Children who are of color, living in poverty, receiving special education and English learner supports, or are homeless are systematically left behind their peers across Kitsap County. Catalyst changes this trajectory by:

1. Placing **diversity, equity, and inclusion** at the center of all we do;
2. Providing **rigorous academics and dynamic supports for all** scholars;
3. Supporting students to find their **purpose and passion** in life; and
4. Providing **world class staff development** to continuously improve practice.

1. Educational Need, Anticipated Student Population, and Challenges

Educational Need

Catalyst co-founders have spent hours listening to the hopes of the Bremerton community. One thing has become clear: Bremertonians have an unwavering belief in the potential of their children, and they see a need for an innovative school designed to support traditionally marginalized students.

As shown below, gaps evident before kindergarten persist through the grades. In more affluent parts of our county, ~95% of students graduate from high school with 79% of those enrolling in two- or four-year colleges and universities. In contrast, 60% of students attending public schools in Bremerton graduate within four years with 46% of Bremerton high school students enrolling in a 2- or 4-year college or university.^{i, ii, iii}

Bremerton School District Readiness and Proficiency Data for SY 2017-2018

Student Population	Kindergarten (Literacy/Math)	3rd Grade (ELA/Math)	8th Grade (ELA/Math)	High School (ELA/Math)
State (overall)	76/64	56/58	59/48	70/41
Bremerton (overall)	67/52	54/52	46/30	63/22
Low-Income	69/49	47/45	41/28	57/18
African American	67/49	52/43	22/11	33/6
Latinx	50/37	46/48	32/21	51/12
2 or More Races	80/62	51/51	45/25	61/19
Scholars with Disabilities	40/29	26/21	11/7	12/NA*
Limited English/ English Learners	46/39	9/25	7/NA*	7/8

*Data not available via OSPI website

The results are bleaker for students who are considered “at-risk” by the state as well as for students in the middle grades. The comprehensive middle school in Bremerton is currently identified by OSPI as a Support Tier III: Comprehensive School. The only other public middle school option in the district is identified as a Support Tier II school because of outcomes for several sub-groups including students with disabilities, English learners, African American students, and Hispanic/Latinx students. Similar data trends exist for neighboring school districts.^{iv} See **Section 4: Attachment 4** for more on student performance.

Anticipated Student Population

While we will likely enroll students from several school districts, we anticipate that the demographics of our school will mirror the diversity of the Bremerton school district.

Student Population	%FR L	%Special Education	%English Learners	%HiCap	%Students of Color	%African American	%Latinx	%Two or More Races
Catalyst: Bremerton	65	18	7	5	50	10	20	20

Beyond these subgroups, we anticipate serving many students from other traditionally marginalized subgroups including families who have been involved in the criminal justice system, are recent immigrants, have intensive mental health needs, are engaged in military service, and are experiencing homelessness. Our program is designed to increase opportunities for these students and to meet their unique needs (see **Sections 3, 4, and 10**).

Grade Levels and Growth Plan

Catalyst serves grades K-8 because students who attend K-8 models have stronger perceptions of their academic competence, especially for socio-economically disadvantaged students.^v This heightened sense of competence sets scholars up for success in high school and beyond. A K-8 model is also aligned with the needs of Bremerton students. Early academic gaps tend to grow larger over the years and a K-8 model will provide our team with the time we need with students to eliminate opportunity gaps.

We will begin serving scholars in grades K, 1, 5, and 6 and grow to full enrollment by Year 4. Enrolling 56 students per grade allows us to serve two cohorts of students per grade level, fostering the collaboration and co-planning needed for teachers to provide students with an excellent academic program. Families have requested that we offer middle school beginning in the first year, an opportunity that will allow us to accelerate learning for students who are academically behind.

Catalyst Enrollment Plan

	2020-2021	2021-2022	2022-2023	2023-2024
K	56	56	56	56
1st	56	56	56	56
2nd		56	56	56
3rd			56	56
4th				56
5th	56	56	56	56
6th	56	56	56	56
7th		56	56	56
8th			56	56
TOTAL	224	336	448	504

Slow growth allows the creation of a strong academic program and a school culture that is culturally responsive to all of our scholars. National research from Stanford University's Center for Research on Education Outcomes has found this type of growth model correlates to higher performance, especially in middle school.^{vi}

Community Demand

Catalyst is a school co-created with community. Beginning in January of 2018, conversations across Kitsap County pointed us to Bremerton, the most diverse and highest-needs area of our county and a region with few high-performing and innovative public school options. Since then, community forums, monthly design team meetings, and engagement with community-based organizations have created significant community support for the school (see **Section 2** and **Section 2: Attachment 2**).

Non-Academic Challenges

Non-academic challenges include:

Facilities	Securing a facility is challenging. We are in active partnership with brokers in Bremerton, the Raza Development Fund, and Washington Charter School Development to aid us in our search.
Enrollment	Enrolling a new school requires deep work in the community, even where there is demand. Our first hire for Catalyst will be a community engagement manager to support this work.
Staffing	We anticipate partnering with institutions such as Olympic College, Western Washington University and Teach for America to create a robust pipeline of mission-aligned staff.
Charter Climate	As the first charter school in Kitsap County, we will work to educate the public about charter schools and develop strong community support.
Financial Stability	We commit to creating a financially sustainable model that includes public and private funds. We have initial support from several funders who are excited about supporting our program.

2. Geographic Location

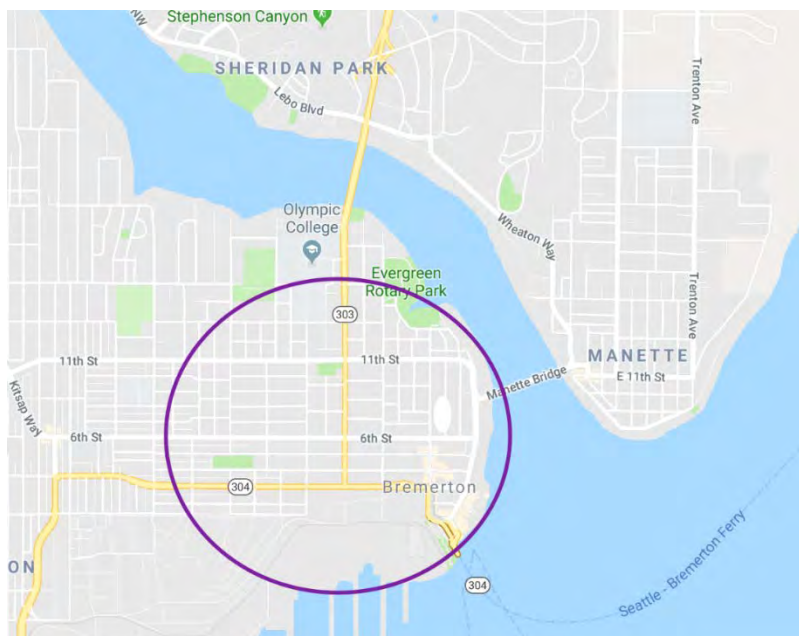
Kitsap County, including Bremerton, is undergoing a rapid rate of diversification. Since 2000, there has been a significant increase of individuals who identify as people of color.^{vii}

- Hispanic/Latinx: 95% increase
- Two or more races: 73% increase
- Native Hawaiian and other Pacific Islander: 46% increase
- Asian, Non-Hispanic: 35% increase
- African American or Black: 10% increase

Catalyst's exact location depends on facilities availability. Outreach efforts are focused in West Bremerton, the most ethnically diverse community in Kitsap County, where few high-quality educational options exist. Of West Bremerton residents, 26% have less than a high school degree, with 7% of residents holding college degrees; 38% live under the poverty level with half of these families being single-parent homes.^{viii} There are also no full elementary schools or K-8 schools in West Bremerton and there is a desire from families to have a school for their children in the community where they live.

Launching the school in or near West Bremerton will ensure that students who do not have access to high-performing educational programming in their neighborhood can attend the school. We anticipate leveraging lottery preferences for low-income students that are aligned with applicable regulations.

Map of West Bremerton



3. School Plan, Mission, Vision, Values, Objectives, and Goals

Plan

Catalyst’s plan is to serve 504 diverse students, including systemically marginalized scholars, in grades K-8 in Bremerton and the surrounding areas. Our model provides students with the culturally responsive, rigorous, and supportive academic environment they need to cultivate and leverage their life’s purpose to be catalysts within their community. Catalyst will meet the SB6194 priority to serve “at-risk” scholars through intentional recruitment throughout low-income portions of the county and by having lottery preferences to prioritize these scholars.

Mission

Catalyst: Bremerton supports our diverse scholars to live full lives and to succeed in college, career, and life. Scholars will find their purpose and passion so that they can cultivate the critical hope, optimism, and leadership essential to be catalysts in their community and world.

Vision

Catalyst: Bremerton’s graduates build a strong understanding of themselves, envision the world in which they want to live, and develop the agency to access the future of their dreams.

Values

Our core values allow Catalyst scholars and staff to realize our mission:



Goals:

- **Goal 1:** Catalyst will attract and retain diverse, mission-aligned, high-quality staff who will remain at the school for three or more years.
- **Goal 2:** Catalyst will build an effective board where 80% of membership fulfill their terms and/or renew memberships, and where at least 50% identify as people of color and/or are from Bremerton or Kitsap County.
- **Goal 3:** Catalyst will ensure the academic growth and performance of its scholars and will perform within the top tier of the Washington School Improvement Framework.

4. Request for Additional Year

N/A. Catalyst will open in 2020.

CATEGORY 3: Section 2: Family and Community Involvement

1 & 2. Parent and Community Demand and Roles: Co-Creation of School Model

Catalyst co-founders share a deep commitment to co-creating schools with families and community. For the past five years co-founder Amanda Gardner has worked with the Bay Area non-profit, Innovate Public Schools, and has worked hand-in-hand with school founders and parent leaders to launch equity-driven schools. Innovate leverages the principles of grass-roots community organizing to engage families in identifying challenges and solutions that face public schools while also building the leadership skills of families to advocate for meaningful educational reform. This work is a part of the foundation upon which Catalyst is built.

Beginning in January of 2018, Catalyst co-founders participated in a countywide listening tour with families and community leaders who share a passion about educational equity. Dozens of 1:1 and small-group meetings helped Catalyst leaders understand the educational ecosystem of Kitsap County and helped school co-founders understand the unique and significant educational needs that exist within Bremerton and the surrounding areas. In addition to 1:1 outreach, Catalyst also held a community forum and a community kickoff to share the mission and vision of the school with families and to glean feedback.

Since October of 2018, our design team has met monthly. This is an ever-growing group; participation in the design team is open to the public. Our design team currently consists of parents, recent graduates, non-profit leaders, concerned citizens, educators, and local community college students. Leveraging protocols and agendas from Transcend Education, a school design lab, community has come together to co-create our model. Examples of design team materials are in **Section 2: Attachment 2**, along with other community-engagement artifacts and letters of support. Our design team has an ongoing voice in the development of our school model and in our efforts to build grassroots support for the launch of our school. Over 50 individuals have attended design team meetings since October; we have a core group of approximately 10 leaders who have attended virtually all meetings and have led recruitment efforts to bring more community to the meetings. Once approved, these leaders and other design team members will support the launch of our school by aiding in the search for our facility, helping to recruit and enroll families, and continuing to develop elements of the school program through the planning year.

Through these efforts, we have incorporated the community's ideas into our school model. Families and community seek high-quality and innovative school options to counter their dissatisfaction with the overall quality of many of the current public schools within their community. Families, especially those with middle school students, have stressed the importance of a school's culture, climate, and its attention to bullying. Families expressed an unwavering belief in the potential of their children; they crave student-centered schools that prioritize social-emotional wellness as well as academic supports. Families want to see a school that fosters the leadership of their students and centers equity for all. Design team members have expressed a strong desire to ensure that schools are updating their practices to ensure that scholars are able to thrive in our ever-changing economy. We also heard a strong desire from parents for schools to offer English as a Second Language (ESL) classes for families and community members. Catalyst's educational program terms reflect this input.

3. Ongoing Community Engagement and Parent Leadership

Students and schools benefit when families are deeply engaged in the educational experience of their students. Schools must include parents and families in the creation of family engagement efforts to ensure

full inclusivity. To this end, Catalyst utilizes a multi-tiered approach to fostering family leadership and engagement to ensure that all families, regardless of their personal context and/or previous relationships with schools, can equally participate in the education of their children.

Catalyst leverages Epstein’s framework for family involvement, which outlines six key levels of engagement and participation. The chart below outlines how these will be enacted at the school^{ix} and provides examples from future Catalyst families for how we will enact each level.

Level of Engagement	Examples at Catalyst
Parenting	<ul style="list-style-type: none"> • Community ESL classes hosted at school • Parenting workshops • Home visits to incoming students and as needed
Communicating	<ul style="list-style-type: none"> • Weekly progress reports with behavior, academic, and socio-emotional data • Advisor/mentoring structure • Communication provided in families’ preferred language • Scholar-Led Conferences and Dream Team Meetings
Volunteering	<ul style="list-style-type: none"> • Equity-driven volunteer opportunities to be inclusive to single parents, working parents, non-traditional caregivers, and families serving with the military
Learning-at-home	<ul style="list-style-type: none"> • Access to online parent resources to understand grade level standards and mastery (Great Schools! Milestones) available in English and Spanish • Family/School playbook outlining policies and procedures
Decision Making	<ul style="list-style-type: none"> • Community Advisory Council (CAC) for input and decision making on ongoing school operations, including direct link to Catalyst Board of Directors • Subsets of CAC for families of subgroups of students (Students with Disabilities, English Learners, Military, etc.)
Collaborating with Community	<ul style="list-style-type: none"> • Community partnerships with organizations that provide services with families and schools

Families are also leaders at Catalyst. When families, students, and school staff come together to identify inequities and generate solutions, schools can be catalysts of community change. Catalyst leverages leadership in families via our Community Advisory Council (CAC). The CAC is a family leadership group that takes on issues of interest that are external to the immediate needs of our school community via a community organizing cycle of action (see **Section 2: Attachment 2**). By identifying educational issues in the community about which they are passionate and seeking to generate change, families at Catalyst not only engage in bettering outcomes for their own children, they are engaged in advocacy efforts to improve the quality of education for children across our community, county, and, potentially, our state. See **Section 15** for more information about the CAC.

Catalyst will not require families to volunteer at the school, as we believe that these types of requirements can be exclusionary. Catalyst will have a family-school-student compact called our “Contract for Excellence” (see **Section 2: Attachment 2**). This document is not binding; it is a symbolic representation of commitments that stakeholders must keep in mind to ensure that scholars thrive.

Catalyst co-founders and our Community Engagement Manager will lead this work.

4. Community Partnerships

Students are best supported when schools and community come together to ensure their success. Thus, Catalyst partners with like-minded community organizations to foster scholar growth and to ensure that community is at the center of our school. We have established relationships and anticipate formal partnerships with the following organizations. Relevant letters of support are included in **Section 2: Attachment 2**. As of now, these partnerships do not include fee-for-service. Catalyst families and scholars will take advantage of services these organizations provide that are included as part of their regular programming.

1. New Life Community Development Agency (New Life CDA): A grass-roots organization committed to ensuring the overall health, wellness, and success of West Bremerton residents. New Life CDA provides a variety of supports to families including access to low-cost or fee-free services at the Marvin Williams Recreation Center. Services include coding classes, open gym, a variety of workshops, and other educational experiences.
2. Living Life Leadership (LLL): A subsidiary of New Life CDA, LLL is a mentoring program that focuses on leadership and community improvement. LLL encourages youth to identify their interests, voice their ideas and concerns, and use their talents to put their individual or group ideas into action.
3. Our GEMS and Our GENTS (Our Gems): A youth mentoring program that encourages young women and men to advocate for themselves. Key pillars of the organization include self-esteem, the value of education, and the development of leadership skills.
4. Partnering for Youth Achievement (PYA): A youth mentoring organization dedicated to ensuring that Bremerton-area youth are supported to achieve greatness.

Section 3: Program Overview

Catalyst provides a rigorous academic program anchored in the Washington State K-12 Learning Standards and that meets the goals outlined in RCW 28A.150.210. Our model ensures that our anticipated scholar population, predominantly low-income and scholars of color, receives the dynamic supports needed to thrive. Each of our program elements is supported by research and is modified from practices used in some of our nation's highest-performing schools serving similar student demographics. These practices are known to be rigorous, engaging, and effective for at-risk scholars. Our program ensures that all of our scholars are supported to reach their full potential; when all students are held to high expectations and given the support to meet those expectations, their success is limitless.

Our model is anchored in the following program terms. Essential design elements related to each program term are discussed in **Section 4**.

Program Term 1: Diversity, Equity, and Inclusion (DEI) Framework of Practice

Rationale

As discussed in **Section 1**, as our community has grown more diverse, gaps in achievement along lines of race and class persist. These gaps in Kitsap County and across our nation's schools have nothing to do with the potential of our children. Rather, they have been created by inequitable and antiquated educational practices baked into the structure of public schools since their origination.^x Large groups of students continue to be left behind their peers who have access to the privilege and power that allow them to thrive within a system that was built with the success of those privileged peers in mind.^{xi}

To create world-class schools that ensure all students thrive, regardless of background, culturally responsive practices related to diversity, equity, and inclusion (DEI) must be at the heart of all we do. Marrying neuroscience research with culturally relevant teaching practices is a key lever for eliminating opportunity gaps, especially for traditionally marginalized youth.^{xii}

Our organizational framework specifies our commitments to and intentional practices of:

- **Diversity**, because we know that it is vital to honor and value the varied and unique lived experiences of our scholars and families. Our scholars must learn to work and build relationships across lines of difference to envision and build a better future for all.
- **Equity**, because we know that equal opportunity is not adequate to ensure the success of all of our scholars.
- **Inclusion**, because the extent to which scholars experience connection to school is a leading predictor of academic achievement and success in life.

Observable Indicators

1. DEI Playbook: Catalyst and community co-create an organization-wide DEI playbook. This living document includes common language and working definitions of key terms related to DEI and outlines common practices to ensure that culturally relevant practices are the norm. The playbook:
 - a. Describes what DEI looks like in action throughout our school;
 - b. Delineates our commitments to maintaining a culture of DEI in our work; and
 - c. Explains our approach to developing our staff as related to DEI.

2. DEI Working Group: This volunteer group comprised of Catalyst staff and parents convenes regularly to assess progress relative to our framework and action plan and provides feedback and suggestions for improvement for the organization.

Program Term 2: Data-Driven Instruction and Dynamic Supports

Rationale

A one-size-fits-all approach to education is both antiquated and one of the practices that leaves behind many scholars, especially those from traditionally marginalized groups.^{xiii}

At Catalyst, scholar learning is personalized so scholars receive support where and when they need it. Scholars move into, through, and out of academic and emotional supports as they are ready, based upon data. These types of supports are known to be effective in serving all scholars, especially those from traditionally marginalized groups, and have been found to be one of the most influential practices used to create high-performing schools.^{xiv}

Observable Indicators

1. Flexible, data-driven, small-group academic rotations: Catalyst elementary classrooms are co-taught, ensuring smaller ratios between adults and scholars. Our staff takes advantage of the lower student to teacher ratio to work in small-group rotation stations with scholars (see **Section 4**).
2. Targeted learning time (TLT): Each week, scholars have a dedicated block of TLT. In the elementary grades, TLT will be a blend of small-group interventions and blended, personalized learning. By middle school, TLT provides scholars with approximately four focus blocks per week during which scholars receive interventions (see **Section 7**) to foster scholar agency and independence.

Program Term 3: Transformational Leadership Development

Rationale

Social-emotional learning (SEL) programs often focus on cultivating non-academic competencies such as grit and perseverance. While this work is well-intended, many SEL programs have marginal impact because they fail to support scholars in developing many of the foundational beliefs and mindsets needed to see themselves as confident, independent thinkers.

Thus, the Catalyst model blends the science of hope with best practices around positive youth development to ensure that our scholars thrive.

1. **The Science of Hope, Optimism, and Purpose:** Individuals who have a strong sense of hope find more success in life. Hope has been found to be the most predictive factor of one's ability to flourish and is a better predictor of performance in college and law school than ACT or SAT scores. Scholars with strong hope scores often have higher daily attendance in school and have higher college-going rates.^{xv} Research suggests that supporting individuals to find their purpose in life, and to live lives aligned to that purpose, is correlated to more fulfilled and longer lives.^{xvi} Scholars

at Catalyst are supported to explore and identify their passion and purpose and how to align their actions to their purpose over time.

2. **Positive Youth Development:** Factors for young-adult success include developing agency, an integrated identity, and key competencies needed to navigate a successful life.^{xvii} When schools only focus on competency development they fail to ensure that all students, especially those most traditionally marginalized, receive the supports they need. Therefore, scholars at Catalyst are supported to understand themselves deeply. As they mature, they see and interact across lines of difference to develop the competencies needed to be independent.
3. **Critical consciousness development (CCD) and Leadership:** Once scholars have mastered the above, they are supported to look outside of their self-interest to explore acting in alignment with their purpose and passion. CCD fosters scholars' ability to understand, navigate, and challenge oppressive social forces facing one's life and community. Development of scholars' critical consciousness is a positive indicator of academic achievement and improved health outcomes, especially for youth who have been traditionally marginalized.^{xviii}

Observable Indicators

1. Each week, K-5 students have a class dedicated to ensuring they develop a strong sense of self and others. Scholars explore who they are across multiple elements of their identity and investigate how they fit into the world around them. They learn about the science of hope and how we can strengthen the belief that not only can tomorrow be a better day, but that each of us has the agency and power to make it so.
2. By middle school this course morphs into a class on identity and social justice, where scholars develop critical consciousness and act to make positive change in our school and our broader community. The school leverages structures such as Achievement First's scholar-led Dream Teams and Passion Projects to ensure that scholars are deeply engaged in the school and community.

Program Term 4: World Class Staff Development

Rationale

Great teachers are developed, not born. The strongest school-related factor of student achievement is the quality of the teacher in each and every classroom.^{xix} Similarly, frequent teacher feedback and the use of data to drive instruction are two of the most impactful practices implemented in high-performing schools.^{xx}

Catalyst provides world-class professional development to all staff. This effort begins with attracting and retaining a diverse, committed and entrepreneurial instructional staff. We have a sophisticated approach to onboarding our teachers to ensure that every adult on campus is familiar with all elements of our instructional model, and that each faculty member is supported to become a content knowledge expert (See **Section 21**).

Observable Indicators

1. Professional Growth Plans (PGP): Each staff member at Catalyst has a PGP with performance goals that are targeted to their unique needs.
2. Frequent Observations and Feedback: Staff members have coaching plans aligned to our vision for instructional excellence, school culture, data-driven instruction, and our DEI framework. Teachers are observed and participate in 1:1 coaching conversation with a school leader at least twice per month. We utilize Relay GSE's *See It Name It Do It* framework (see **Section 21: Attachment 21**).
3. Varied Growth Strategies: Live coaching, regular data meetings, and practice-based professional development ensure that each of our staff members grows over time. Professional development for staff takes place in whole-group, small-group, and individual settings and includes seeing a model; naming a clear, bite-sized action step; and engaging in deep, authentic practice. This work allows us to create a culture of continuous improvement so that we can adapt and change over time.

Section 4: Curriculum and Instructional Design

1. The Learning Environment and Essential Design Elements





Catalyst provides engaging learning environments with **dynamic supports** to scholars in grades K-8. A typical Catalyst classroom will serve 28 scholars with two classroom cohorts per grade level. K-4 classrooms are co-taught with one lead teacher and one small-group instructor (SGI). In grades 5-8 there is a designated SGI per grade level, shared across classrooms.







Catalyst will serve a diverse student body, mirroring the demographics of the Bremerton School District (see **Section 1**). Students who feel strongly connected to their school demonstrate higher rates of academic achievement.^{xxi} One of our essential design elements is a **diversity, equity, and inclusion practice framework**. The strategies described below are ways that we enact this commitment as we build a strong instructional program, which is key for our anticipated population's success. We adopt the framework for inclusivity and cultural responsiveness created by Dr. Beverly Daniel Tatum, which includes the following elements.^{xxii}







- **Affirm Identity:** The values, habits of mind, and experiences of each member of the school community are continuously represented in the culture of the organization.
- **Build Community:** The school creates multiple opportunities to build community, across many domains.
- **Cultivate Leadership:** The school finds opportunities for scholars to envision a future in which they are able to craft a vision for what is possible for themselves and their world and act to bring that future to life.







Catalyst is a culturally responsive and inclusive school that engages all scholars in rigorous, grade-level-appropriate learning experiences. The New Teacher Project (TNP) recently found that access to grade-level academic experiences vary greatly across schools and that traditionally marginalized students, whom Catalyst aims to serve, are disproportionately impacted by a lack of access. This, coupled with lower-held academic expectations for these students, creates a lack of opportunity for students to thrive.^{xxiii} In response to this, Catalyst provides universal access to grade-level academic tasks in each and every classroom. Additionally, teachers and instructional staff are supported, through coaching and professional development, to hold high expectations for all scholars, regardless of background, and provide consistently strong instruction in each classroom, every day.

Our essential design elements, each chosen for their specific alignment to our mission as well as our commitment to creating a school that is culturally responsive to the needs of our diverse student body, are as follows:

Essential Design Element	Description and Connection to Mission and Vision	Alignment to Tatum's ABCs of Inclusion		
		Affirm Identity	Build Community	Cultivate Leadership
Deeper Learning Blocks (DLB) and Academic Rotations (AR)	<p>DLBs and ARs allow scholars the time required to master content and include a whole group mini-lesson, guided time with a teacher, additional support from an SGI, independent practice time, collaborative practice time, and just-right practice using technological supports.</p> <p>K-4 scholars will receive much of their instruction via small group ARs. In a given classroom, the lead teacher may present a whole group mini-lesson related to a standard, and then scholars will split into 3-4 small groups. One group will receive support from the lead teacher while another group of scholars receives support from the SGI. The third independent group of scholars will practice recently-learned standards via online programs, while the 4th group either participates in a collaborative learning activity or has additional work and practice time.</p> <p>In the middle school, scholars will work in groups of four, known as "crews," with one scholar being the crew captain. The teacher will introduce new content to the class and students will work through, practice, and demonstrate proficiency of content by working individually and collaboratively.</p>			
Dynamic Supports	Scholars move into, through, and out of academic and emotional supports as they are ready, based upon data, and will receive support for amount of time that they individually need.			
Inclusive Co-Teaching	Each K-4 classroom has a Lead Teacher and an SGI. They work together to provide whole- and small-group instruction in the			

Essential Design Element	Description and Connection to Mission and Vision	Alignment to Tatum’s ABCs of Inclusion		
		Affirm Identity	Build Community	Cultivate Leadership
	classroom. Gr. 5-8 have a dedicated SGI per grade level.			
Looping	Teachers will “loop” with their classes for two years in 1st through 4th grades. Kindergarten will be a standalone class. Scholars have more time for learning when they are with the same teacher and classmates for two years as less time is lost in transition—a finding that is especially true for minority students. ^{xxiv}			
Multi-Age Grouping	Multi-age grouping builds community, deepens relationships, personalizes learning, and fosters leadership between students and staff. ^{xxv} We leverage multi-age grouping during Change-Maker Space, Enrichments, and other elective activities.			
Sunrise and Sunset Huddles	<p>Days open and close with Sunrise and Sunset:</p> <p>Sunrise Huddle: Opening huddle each day in which scholars goal-set and build community. Sunrise configurations include:</p> <ol style="list-style-type: none"> Classroom Huddle: Scholars meet with their class, goal set, build plans for success, and build community. Affinity Huddle: Scholars meet across grade levels in affinity groups by race, gender, interest, or birth order, to investigate and build alliances across grades. Mentor Huddle: Older scholars as mentors meet with younger scholars to go through weekly/daily goals, give advice on how to meet goals, and be sounding boards and solution generators for younger scholars. Older scholars teach content they are learning and mastering to their younger counterparts to build 			

Essential Design Element	Description and Connection to Mission and Vision	Alignment to Tatum's ABCs of Inclusion		
		Affirm Identity	Build Community	Cultivate Leadership
	<p>confidence in their content mastery. Older and younger scholars work together to solve problems and dilemmas, learning that everyone has something to contribute and an important voice.</p> <p>4. Schoolwide Huddle: The school comes together to build community, celebrate, and practice leadership.</p> <p>5. Sunset Huddle: Each scholar meets with their classroom huddle to review goals and to reflect on successes and opportunities for continued growth.</p>			
Positive Youth Development, Leadership, and SEL	<p>In the elementary grades, scholars participate in SEL courses, where they explore elements of their identity and cultivate the habits of mind needed to be independent and collaborative learners, with a focus on cultivating critical hope and optimism. By middle school, this line of learning becomes a course where scholars learn leadership skills which they apply to develop solutions to community issues about which they are passionate. The curricula in these courses will be aligned with that of our change-maker space courses and scholars' yearly passion projects.</p>			
Enrichment Courses	<p>Teachers and community members have passions to share with scholars. Weekly, scholars will meet with teachers or community members to deeply immerse in a passion of their choice. Every scholar will participate in several enrichments over the course of the year, on topics such as arts, physical and mental wellness, cooking, gardening, etc. This time will also be when scholars can form clubs of interest and/or participate in athletic activities beyond what is offered in the</p>			

Essential Design Element	Description and Connection to Mission and Vision	Alignment to Tatum's ABCs of Inclusion		
		Affirm Identity	Build Community	Cultivate Leadership
	school's physical education and wellness class.			
Change Maker-Space and Passion Projects (CMS/PP)	Every year, Catalyst scholars collaboratively identify a challenge in their community that they want to solve. In peer groups, scholars research the issue, the impact it has on the community, and conduct empathy interviews. The research inspires ideation and solutions, which scholars then present to the primary stakeholders and impacted community.			
Dream Team	The Dream Team is a group of supporters for each scholar. It consists of a family member(s), faith leader (if applicable), coach, sibling, teacher, principal—anyone who cares deeply for the scholar. The Dream Team is convened at least twice per year as a part of scholar-led conferences.			

2. Curriculum Overview

Catalyst takes seriously our personal responsibility for scholar success in school and life. While we ensure that all of our scholars are equipped to apply to and be accepted to college, this may not be each scholar's pathway. Therefore, it is our obligation to provide scholars with what they need to gain employment in a high-wage, high-growth job that is aligned with their passion.

Courses at Catalyst ensure that scholars leave the 8th grade with 21st-century skills that are required to participate in our ever-changing global economy.^{xxvi} Our courses are aligned with the intent of the relevant OSPI State Superintendent's priorities and are aligned with the Washington State K-12 Learning Standards. Specific outcomes for courses are outlined below:

	ELA	Math	Science and History	SEL + Leadership
Standards	Washington State K-12 ELA Learning Standards	Washington State K-12 Mathematics Learning Standards	Washington State K-12 Social Studies Learning Standards Washington State K-12 Science Learning Standards/Next Generation Science Standards	Teaching Tolerance Social Justice Learning Standards

	ELA	Math	Science and History	SEL + Leadership
Outcome for K-5	<p>1+ years of growth on STEP assessment for incoming students at/above grade level</p> <p>> 1 year of growth on STEP assessment for incoming students below grade level</p> <p>1+ year of growth on CCSS-aligned units of study rubric</p> <p>90% of incoming students below grade level will make 1.5 years of growth on Northwest Evaluation Assessment Measures of Academic Progress (NWEA MAP)</p> <p>80% of students at/above grade level will meet NWEA MAP goal</p> <p>By Grade 5, 80% of students proficient on SBAC.</p>	<p>90% of incoming students below grade level will make 1.5 years of growth on Northwest Evaluation Assessment Measures of Academic Progress (NWEA MAP)</p> <p>80% of students at/above grade level will meet NWEA MAP goal</p> <p>By Grade 5, 80% of students proficient on SBAC</p>	<p>80% of students proficient on Washington Comprehensive assessment of Science (WCAS)</p> <p>90% of students proficient on Catalyst rubric for CMS/PP</p>	<p>Proficient on Catalyst Rubric for CMS/PP</p> <p>Growth on Catalyst SEL and Leadership Rubric and Surveys</p>

	ELA	Math	Science and History	SEL + Leadership
Outcomes for 6-8	<p>1+ year of growth on CCSS aligned units of study rubric</p> <p>90% of incoming students below grade level will make 1.5 years of growth on Northwest Evaluation Assessment Measures of Academic Progress (NWEA MAP)</p> <p>90% of students at/above grade level will meet NWEA MAP goal</p> <p>By grade 8, 80% of students proficient on SBAC</p>	<p>90% of incoming students below grade level will make 1.5 years of growth on Northwest Evaluation Assessment Measures of Academic Progress (NWEA MAP)</p> <p>90% of students at/above grade level will meet NWEA MAP goal</p> <p>By grade 8, 80% of students proficient on SBAC</p>	<p>80% of students proficient on Washington Comprehensive assessment of Science (WCAS)</p> <p>90% proficient on Catalyst rubric for CMS/PP</p>	<p>Proficient on Catalyst rubric for CMS/PP</p> <p>Growth on Catalyst SEL and Leadership Rubric and Surveys</p>

3. Curricular Choices

Curricula must be rigorous and tightly aligned with the Washington State K-12 Learning Standards (WSLS) to ensure that all students receive a consistently excellent educational experience. Catalyst utilizes a comprehensive strategy to vet and select the curricula for each grade level and content area. A sample of the type of scope and sequence we anticipate using for Mathematics is in **Section 4: Attachment 3** and an overview of the process to select curricula is in **Section 4: Attachment 4**. This process also outlines how the founding team will ensure that the curricula are vertically and horizontally aligned and that they are culturally responsive to all students. Informed by a collective 30 years of experience leading high-performing schools, Catalyst founders have visited schools with proven success in Washington State; California; Colorado; Massachusetts; Texas; Washington, D.C.; and Tennessee to help inform their curriculum choices and to ensure that what is chosen is deemed most impactful for our scholar population.

4. Primary Instructional Strategies

Catalyst will serve a diverse population of students, each of whom will benefit from instructional strategies designed to meet their unique needs. We anticipate serving a significant number of English learners whose primary language is Spanish; a portion of our population will be mobile as we will serve some students whose families are in the military. Similarly, we know that many of our students will identify as being from several racial groups, and a significant percentage of our students will have diagnosed disabilities. We therefore recognize that all scholars bring with them cultural assets that they can leverage to grow into engaged, passionate, and independent learners. We will use Zaretta Hammond's Ready for Rigor Framework to guide unit and lesson planning and to leverage responsive instructional strategies.

Ready for Rigor Framework incorporates four distinct practices which, when implemented in concert, create the conditions for students to grow into independent learners.^{xxvii}

Awareness: We build awareness and understanding that we live in a society where some people have unearned privilege and others have unearned disadvantage based on race, class, gender, ability, or language. Faculty must work individually and collectively to identify and interrupt inequity in all aspects of school.

Instructional Strategies:

1. Practice of using “ouch” and “oops” framework when identifying areas of insensitivity or bias.
2. Constructivist listening protocols to foster deeper understanding of one’s self and others, and practicing effective communication.
3. 2 x 2 feedback sessions amongst staff, across levels of the organizational structure, to ensure timely and honest feedback, especially around issues of bias.

Learning Partnerships: We build trust with scholars along lines of commonality and difference to create a culture of physical and emotional safety. Relationships are built upon a foundation of trust, so scholars can maximize learning and rise to high expectations. Our scholars know that it is safe to fail and to try again, utilizing feedback and other growth opportunities or supports to help.

Instructional strategies:

1. Scholar goal setting and reflection protocols during Sunset period.
2. Scholar and staff circles to foster affirmation and validation.
3. Asset-based feedback protocols to give “wise” feedback.

Information Processing: As a faculty, we must understand how culture influences how scholars’ brains process information. By doing this, faculty ensures that learning opportunities leverage multiple teaching and learning modalities that depend on more than the dominant culture’s educational model.

Instructional Strategies:

1. Ignite, Chunk, Chew, Review instructional approach.
2. Whole brain teaching techniques to foster equitable participation in class.
3. Use of varied strategies to foster information processing (call and response, effective provocation, use of metaphor and story-making).

Ready for Rigor Framework incorporates four distinct practices which, when implemented in concert, create the conditions for students to grow into independent learners.^{xxvii}

Community Building: We foster an environment that is emotionally and intellectually safe, so scholars take risks academically. We create a school environment that demonstrates genuine care and inclusiveness by considering universal cultural themes in our school, utilizing cultural practices to create safe space, and implementing rituals that build independent learners.

Instructional Strategies:

1. Using the academic mindsets framework as a structure to foster a learning community.
2. Selective vulnerability activities in which staff and scholars share struggles and successes in a safe way.
3. Common morning, classroom, and afternoon routines to build common language and culture.

5. Differentiated Instruction

Given our scholars' diverse needs, we know that our instruction must be culturally relevant, engaging, and tailored to help them grow each and every day. In order to effectively differentiate instruction, schools must cultivate a data-driven culture where staff are consistently gathering and using data to know how, when, and where differentiation is needed and to measure the efficacy of differentiation.

Elements of Differentiation	How Differentiation Occurs
Small Group Instruction and Academic Rotations	Dynamic, flexible student grouping allows teachers to differentiate what is taught, how teaching occurs, and the pace at which standards are taught. Co-teaching in grades K-5 ensures that students receive individualized instruction and time practicing and mastering key skills.
Formative Assessment	Teachers will use programs such as Socrativ to create standards-driven online checks-for-understanding that scholars can take for each instructional standard. Teachers follow data-driven instruction protocols to analyze data quickly and use it to modify instruction later in the school day or week.
Change-Maker Space and Passion Projects	Scholars choose concepts about which they are passionate, and design-think their way to solutions for challenges faced by their communities. This allows scholars to have a portion of the day where individually, or in a small group, they are learning at their own path and pace.
Integrated ELD	Scholars identified as English Learners who need support will receive integrated ELD supports as part of their academic rotations during deeper learning blocks*.

Elements of Differentiation	How Differentiation Occurs
Inclusive Supports for Scholars with Disabilities	Academic, behavioral, and social-emotional supports will be provided to scholars with disabilities in the general education classroom. This allows special education and general education staff the opportunity to collaborate to identify areas of differentiation and provide needed accommodations and modifications*.
Tiered Interventions	Catalyst will leverage a tiered system of interventions for scholars who are identified as needing additional supports. Specific programs for interventions will be developed as part of our curricula development plan outlined in Section 4: Attachment 4* .

*These practices are further detailed in **Section 10**.

Section 5: Student Performance Standards

1. Alignment to Washington State K-12 Learning Standards

Creating equity-driven schools requires that instruction be aligned to externally validated and rigorous academic learning standards. This ensures that all students, regardless of background, are held to high academic expectations and leave the school with the skills and knowledge needed to be successful. Programming at Catalyst is aligned to the Washington State K-12 Learning Standards (K-12 WSLS), which incorporate Common Core State Standards for ELA and Math, as well as Next Generation Science Standards. Catalyst aligns instruction to the Washington State K-12 Social Studies Learning Standards and will adopt the English Language Proficiency Standards (ELPS).

Catalyst creates grade level scopes and sequences for all content areas aligned to standards and that are horizontally and vertically aligned. Resources such as Student Achievement Partners' Instructional Practice Guides and Coherence Maps are leveraged to guarantee that instruction is standards-aligned and to ensure that the shifts in instruction required by Common Core are deeply embedded into lessons.

Standards and Ongoing Assessment

Diagnostic, formative, and summative assessments ensure that scholars are supported to make significant academic gains across all subject areas. Initial diagnostic assessments determine scholars' prior knowledge and assessment of core content knowledge. Scholars participate in formative and benchmark assessments throughout the year to yield data to use in interventions. Teachers and SGIs create online exit tickets to gather data and provide support immediately, preventing scholars from falling behind. Formative assessment data is also used so that instructional staff can take a data-informed approach to supporting scholars during TLT. This data is used to inform the composition of small group academic rotations. Summative data allows scholars, their families, and staff to know how students are achieving at critical milestones throughout and at the end of an academic term. This data is used to determine student mastery, grades, and is used by the organization to revise curricula and lesson plans.

English Language Arts (ELA) and Mathematics

Catalyst leverages a suite of assessments to determine student growth and proficiency, as well as areas of strength and needed support. Several assessments are used in both ELA and Mathematics. We use the Northwest Evaluation Association Measures of Academic Progress (NWEA MAP Growth) at the beginning of each academic year to establish a nationally-normed baseline of scholars' reading and mathematics performance. Scholars then take the assessment twice over the course of the year to determine student growth and proficiency. Summative data is gathered at the end of the year (beginning in 3rd grade) via Smarter Balanced assessments.

Scholars in the elementary grades also participate in the STEP assessment (or similar), at the beginning and throughout the year, to determine scholar reading levels and growth. STEP yields data related to skills in phonics, decoding, and other areas that our staff analyze during frequent data meetings. At the elementary level, other formative assessments are used to determine progress related to core literacy skills such as letter recognition, sight word recognition, etc., as well as via online programs such as Lexia.

In middle school, scholars take literacy screens when they begin school to determine areas of strength and need. Scholars are screened for decoding, reading comprehension, fluency, writing skills, vocabulary

development, and close reading skills. Throughout the year scholars participate in formative assessments related to key literacy skills and standards and this data is used to inform instruction. Online programs also provide teachers with formative data.

In Math, online programs such as ST Math, Zearn, and Assessment Learning in Knowledge Spaces (ALEKS) yield valuable formative assessment data to monitor scholar mastery and provide intervention as needed.

In all content areas, including Science and Change-Maker Space (CMS), teachers gather formative assessment data via teacher-generated exit tickets, quizzes, and other methods of assessment. The CMS rubric is used to assess scholar growth related to Passion Projects.

2. Additional Academic Standards

Our program exceeds the scope of the Washington State Learning Standards. These include:

Standards, Content Areas, and Grade Levels	Rationale and Exceeding State Standards	Resources
DEI and Community Engagement K-8	A focus on DEI is at the center of the Catalyst model. We will develop DEI standards for scholars and staff that are vertically and horizontally aligned to other learning standards. Our standards will focus on identity development, social action and change, and practices to cultivate an inclusive community.	Teaching Tolerance Social Justice Standards DEI frameworks and Parent Engagement Competencies from partner organizations
Wellness and Scholar Leadership (WSL) K-8	Catalyst provides scholars with learning experiences that are developed to ensure that scholars can lead fulfilling lives. Our WSL standards will be developed with this outcome in mind and will allow scholars to develop the non-cognitive skills and leadership skills necessary to thrive.	Teaching Tolerance Social Justice Standards Valor Collegiate Compass Camp Standards Expeditionary Learning Character Framework
21st Century Skills K-8	Integrating 21st century skills into core content areas is vital if our students are to graduate prepared to meaningfully participate in our global economy. Catalyst's 21st Century Skills standards will outline the ways that scholars will become proficient in a variety of 21st century skills, including key skills such as creativity, collaboration, critical thinking, and communication. ^{xxviii}	P21 Framework for 21st Century Learning Washington Educational Technology Standards

3. Promotion Standards

Catalyst uses a standards-based approach to learning, which is an effective approach to students entering the school in later years, who may come to school academically behind. Scholars will be assessed throughout the academic year on content standards and will be provided with the supports they need to become proficient in each standard. Grade level retention is only considered when it is to the benefit of the students and is based on a thorough analysis of their needs by stakeholders. Elements of the Catalyst model—including looping, multi-age learning opportunities, co-taught classrooms, and a variety of academic, behavioral, and social-emotional supports, ensure that students advance to the next grade level in the vast majority of situations.

Staff collaborate to determine “power standards” for the purposes of grade level promotion and/or retention. For scholars to pass from grade to grade they must be deemed proficient on at least 80% of power standards for their grade level. Proficiency on power standards is determined by analyzing multiple points of data including formative and summative assessments, teacher observation, and scholar work.^{xxix} Families are informed of grading and promotion policies through multiple means, including summer family orientation sessions and/or home visits, as well as via our family handbook. Staff receive support and training regarding grading practices and will learn about promotion and retention policies via summer orientation sessions.

Families and scholars are intimately familiar with scholar progress throughout the academic year. Each week, scholars receive a progress report that outlines academic and behavioral progress. Families receive communication bi-weekly to ensure that questions and concerns are proactively resolved. At least twice per year, Dream Team meetings are held to ensure that detailed conversations around overall progress are held. Interpreters will be available during these meetings to ensure that all families receive information in a language they can understand, to the extent possible.

Catalyst supports the needs of scholars of military families, of whom many will move to attend up to 6 different schools over their educational experience.^{xxx} This support will include a documented report of updated assessment data as well as a qualitative report on student strengths and needs written by the school staff. Catalyst will contact the receiving school to hold an outtake/intake conference to ensure that information is not lost in the transition.

4. Exit Standards

See **Section 5: Attachment 5** for Catalyst’s full exit standards and criteria.

Section 6: High School Graduation Requirements

N/A. Catalyst: Bremerton will not serve high school students.

Section 7: School Calendar and Schedule

1. Annual Academic Schedule

The Catalyst academic calendar meets the needs of our unique educational model and meets Washington state minimum requirements as stated in RCW 28A.150.220(2). Catalyst leverages an expanded school day and year, both of which have been shown to increase student proficiency and to improve the overall experience a child has in school, especially for economically disadvantaged students.^{xxxi} The chart below illustrates how the Catalyst calendar meets and/or exceeds state requirements. See **Section 7: Attachment 6** for our Year 1 academic calendar and associated calculations.

Portion of School Year	WA Requirements	Catalyst: Bremerton
School Days	180	185
Instructional Hours	1000	1210

2. Daily and Weekly Schedule

Catalyst has designed the school day and week to align to our mission and our educational program, and to meet the unique educational needs of our scholars. Our school day is 8 hours long with classes starting at 8:00 AM and dismissing at 4:00 PM on Mondays, Tuesdays, Thursdays, and Fridays. One day per week, school releases at 12:45 PM so that teachers can have time for professional development and collaboration. There is additional targeted learning time before and after school, based on the individual needs of scholars. Scholars spend significant time during the week in core content area classes, as shown below:

Subject Areas	Daily Instructional Minutes	Frequency per Week	Instructional Time per Week
Humanities (ELA + History)	75	4	300
Mathematics	75	4	300
Change Maker Space (Math, Science, STEM)	75	4	300
Totals	225	4 each	900

In addition to core classroom time, scholars have significant additional instructional time each day. Each day begins with Sunrise and ends with Sunset, advisory periods that are used for community building, socio-emotional supports, and goal setting and reflection. Additionally, scholars have a daily Wellness + Purpose block when specials classes are held. Scholars also have a focus period at the end of the day where students receive additional targeted learning time, support from teachers and specialists, and time for executive functioning skills and homework help. On our early release day, scholars participate in a

school-wide community meeting and leadership block and participate in teacher-led Enrichment courses and/or receive additional academic, behavioral or social-emotional supports. Scholars also have two break/recess periods daily.

Section 8: School Culture

1. School Culture Overview

As mentioned in **Section 4**, Catalyst’s essential design principles, from which emerged our core values, include affirming the identity of our scholars, fostering belonging, and cultivating leadership. These principles are through-lines across both our academic and school culture models and undergird our positive discipline framework.



The table below illustrates our core values and describes how we enact these values to promote a positive and culturally inclusive environment that drives toward the achievement of our mission:

Equity	<p>We lead for equity.</p> <p>We embed equity into each piece of our program. No one is marginalized, and we develop the empathy and perspective needed to champion equity for all.</p>
Leadership	<p>We are leaders.</p> <p>We develop our leadership skills to develop the vision and voice necessary to lead the changes we want to see in our school, community, and world.</p>
Joy	<p>We are joyful.</p> <p>We bring humor and spirit to our work because these are some of the primary ways that hard work gets done.</p>
Courage	<p>We are courageous.</p> <p>We have the courage it takes to take on academic, social, and personal challenges. We recognize our courage as a means to empowerment.</p>

Achievement	<p>We bring our A game to all we do.</p> <p>We develop our ability to think critically and engage in discourse across subject areas and in real-world settings. In doing this, we cultivate the mindsets and skills required to be competitive in college, career, and life.</p>
Wellness	<p>We take care of ourselves, so we can be there for others.</p> <p>We play big, have heart, and love ourselves. We know who we are and what we are passionate about and seek to help others do the same. We take care of ourselves to show up as our best selves.</p>

2 & 3. Creation and Maintenance of School Culture and Ensuring Cultural Responsiveness

Restorative, Culturally Responsive, and Trauma-Informed Practices

Rooted in the values above, we create a culture of connection and belonging, caring for scholars' emotional wellness. Adverse childhood experiences (ACEs) may be the greatest public health threat facing our nation today.^{xxxii} In Washington, 26% of adults have experienced three or more ACEs; individuals in Mason and Kitsap counties report experiencing ACEs at or above the state average. In a typical Washington classroom, 13/30 scholars will have experienced at least three ACEs with at least three having experienced six or more.

In her book *Culturally Responsive Teaching and the Brain*, Zaretta Hammond asserts that creating culturally responsive classrooms requires us to foster emotional stability and an ethos of caring that permeates every aspect of the classroom and school culture.^{xxxv}

Establishing a culture rooted in cultural responsiveness is vital for the success of all of our scholars but it is especially true for our scholars with disabilities, those who are designated as English Language Learners, and other scholars who are at risk of academic failure. Administrators at Catalyst will lead the work to create this responsive and inclusive school culture by working with the staff and other stakeholders to establish, monitor, and improve the school's culture over time.

The following practices will foster this environment at Catalyst:

- **Trauma-informed practices:** Trauma-informed classrooms are predictable, prioritize safe relationships and engagement, and provide opportunities for regulation.^{xxxvi} We integrate these by having a common classroom schedule and routines, and by dedicating time for relationship building. Opportunities for regulation exist via planned movement breaks and having classroom spaces where scholars can calm themselves. Our staff is supported to understand and use trauma-informed practices.
- **Culturally responsive practices:** These practices ensure that we meet the needs of all scholars, especially scholars receiving special education services, English Language Learners (ELLs), and other who are traditionally marginalized:

- **Knowing scholars as individuals:** We build deep and lasting relationships with scholars so that their needs can be met, including differentiating instruction by knowing and leveraging the academic needs of scholars to provide tailored support (see **Section 3**).
- **A focus on inclusiveness, collectivism, and identity development:** Structures such as affinity groups, helping trios, and world cafe experiences foster student identity development and create opportunities for social and academic dialogue.
- **Trauma-informed practices for classroom management and discipline:** Our approach to integrating trauma-informed practices into our approach to student discipline is outlined in **Section 12: Attachment 8**.

Schoolwide Structures, Systems, and Routines

An effective school culture begins with clarity around how systems and routines allow us to build an environment focused on teaching and learning. The following structures frame and maintain our school culture:

- **Catalyst Kickstart:** During the first week of school scholars participate in an orientation to learn about school values, classroom routines, and procedures, and to begin developing deep relationships with staff.
- **Positive Behavior System:** Scholars receive points for meeting or exceeding expectations. Scholars set goals for improvement and those who need targeted support receive this help during the Support Club block.
- **Classroom Points System:** Teachers convene Calls to Begin and End each class period. The Call to Begin includes time for greeting and previewing lesson objectives; the Call to End includes summarizing the objectives, thanking scholars for their participation, and issuing class points to acknowledge how the group met school values for that period. Points are incentives for individual scholars as well as classes.
- **Sunrise and Sunset:** Daily Sunrise and Sunset periods create time for social-emotional learning, advisory and mentoring support, and school-wide community and culture building (see **Section 4**).
- **Schoolwide Playbooks on Instruction and Culture:** Catalyst staff receive significant development to implement consistent, school-wide classroom routines and procedures. All of these routines will be included in the school-wide playbook of effective practices.

High Expectations and an Assets-Based Belief in the Potential of All Scholars

The impact of expectations on scholars is recognized in educational research.^{xxxvii} In “The Opportunity Myth,” a study recently published by The New Teacher Project, researchers found that ensuring access to teachers who will hold high expectations of scholars and provide them with rigorous, appropriately challenging work, is a key factor to ensuring educational excellence and equity.

We establish and maintain a culture of high expectations by:

- Hiring staff with an equity lens and developing our staff to maintain a growth mindset about the potential of all of our scholars, with the expectation that staff will work to dismantle educational inequity.
- Informing scholars and families of the importance of high expectations on academic performance and life success.

- Completing home visits and introducing the Contract for Excellence to family members and scholars.

Welcoming Mid-Year Scholars

Scholars who join Catalyst mid-year will:

- Shadow a student at Catalyst prior to their first day;
- Receive a home visit by a Catalyst staff member;
- Participate in an abbreviated Catalyst Kickstart program;
- Be assigned a scholar mentor in their class who will support them as they learn routines; and
- Receive additional school/family communication during the first month of school.

4 & 5. A Day in the Life of a Scholar and Teacher

Time	Nevaeh, a 3rd grade scholar	Ms. Lopez, a 3rd grade teacher
Before School		Ms. Lopez begins the morning at staff Sunrise huddle where the staff review key priorities for the day and celebrate one another with shout-outs and appreciations.
Breakfast, Arrival, and Targeted Learning Time (TLT)	<p>Nevaeh arrives at school and is greeted by a co-founder with her choice of a handshake, high-five, or hug.</p> <p>She has breakfast and participates in TLT where she sets academic goals for the day with her teacher.</p>	<p>Ms. Lopez attends morning meeting with instructional staff, where she gives and receives shout-outs aligned with Catalyst core values.</p> <p>She prepares her classroom, projecting learning objectives, language objectives, and agendas on the board, and meets scholars at the door.</p> <p>She works with a small group of ELLs to preview academic vocabulary for the day and front-load the Sunrise.</p>
Sunrise	Nevaeh's class is having a world cafe conversation about equity. Nevaeh and her classmates discuss the contributions and experiences of individuals with disabilities and tie their discussion to texts that they have been reading in class.	Ms. Lopez frames the world cafe discussion for the day, ensures that scholars have modified texts and other supports as needed, reminds scholars of their habits of discourse, and supports student discussions.

Time	Nevaeh, a 3 rd grade scholar	Ms. Lopez, a 3 rd grade teacher
Deeper Learning Block: Humanities	<p>Nevaeh participates in academic rotations for literacy and humanities. The theme for this unit of study is “My Community and World.” Nevaeh meets first with Ms. Lopez and participates in a guided reading circle, reading texts that are at grade level, and receives support on practicing fluency and doing textual analysis via close reading strategies.</p> <p>Next, she transitions to participate in a phonics rotation with Mr. Simmons, a small group instructor (SGI).</p> <p>Nevaeh then practices skills via Reading Plus and completes a thinking map for her writing composition.</p>	<p>Ms. Lopez quickly reflects on the co-teaching plan that she created with Mr. Simmons, the small group instructor (SGI) while scholars complete their Do Now.</p> <p>She holds the Call to Begin with the class to review objectives and activities for the day and to set a class points goal for the day.</p> <p>During class she pulls three guided reading groups and does 1:1 conferencing with select scholars.</p> <p>She ends with a Call to End, issues class points for the day and has scholars give shout-outs for values in action.</p>
Recess	Nevaeh meets her friends on the playground to play games and relax.	Ms. Lopez takes a break in her classroom and prepares for the next class.

Time	Nevaeh, a 3 rd grade scholar	Ms. Lopez, a 3 rd grade teacher
Deeper Learning Block: Mathematics	<p>Nevaeh participates in academic rotations for mathematics and begins in an independent workstation where she creates a proof of proficiency math map for a standard.</p> <p>Next, Nevaeh meets with her teacher and a group of four other scholars for a math challenge group. The teacher presents a challenging problem and the scholars work together to prove a solution. Scholars then defend and explain their work, using their habits of discourse.</p> <p>At the end of the block, Nevaeh completes a “logic story” and completes a “mental math” activity to round out her math learning for the day.</p>	<p>Ms. Lopez convenes scholars for the Call to Begin, explaining the day’s objectives and activities.</p> <p>She then pulls three small groups of scholars for a Cognitively Guided Instruction math group while Mr. Simmons pulls other scholars for math fluency practice and 1:1 help.</p> <p>Ms. Lopez holds the Call to End and assigns the class points for the day.</p>
Lunch / Recess	Naveah plays 4-square with friends, then transitions inside to eat lunch and to have some independent reading time.	Ms. Lopez and Mr. Simmons eat lunch in the teacher workroom.
Change-Maker Space (CMS)	Nevaeh and peers work on their Passion Project, designing a playground that will serve all scholars well, especially those with disabilities. Nevaeh’s sister has a physical disability, so she is excited to think about designing a playground that her sister would enjoy.	<p>Ms. Lopez facilitates a Call to Begin/End and issues a class score.</p> <p>She conferences with small groups throughout class, supporting them as they work on their Passion Projects.</p> <p>Mr. Simmons has planning during this block and is preparing for the W+P block.</p>

Time	Nevaeh, a 3 rd grade scholar	Ms. Lopez, a 3 rd grade teacher
Wellness+ Purpose Block (W+P)	Nevaeh is taking performing arts for her W+P block this quarter. They study how to do improvisation and explore their creative passions.	Ms. Lopez has planning time while Mr. Simmons teaches. Ms. Lopez attends a data meeting with her peers to review an action plan they created at the last Look Back/Step Forward meeting. She then analyzes student data and creates plans for tomorrow's lessons.
Targeted Learning Time + Focus	Nevaeh joins a small group with other ELL scholars to receive designated English Language Development. They are learning about different idioms, their meanings, and how they can be used in context in their writing. Navaeh ends by completing her assignments for the day and starts on her homework.	Ms. Lopez and Mr. Simmons work with small groups of scholars or conference 1:1 with individuals. They use their data from student exit tickets and online learning platforms to create dynamic tutoring groups.

Section 9: Supplemental Programming

1. Summer School

Catalyst will not offer summer school in Year 1 but will integrate the teaching of school culture and routines into the first three weeks of school, since all students will be new to the school. In years 2-4, we will offer a 2-week, partial day (8 AM - 12 PM) summer school for incoming kindergartners and incoming 5th graders because both cohorts will be new to Catalyst. Once we reach full scale, we will offer a 2-week partial day kindergarten summer school in effort to acclimate incoming kindergartners to the school and culture. This program will be staffed by our K-1 faculty and the school founders and will be funded through our general operating budget.

Year	Program Offering	Number of Scholars served
2021-2022	Incoming Kindergarteners and Incoming 5th graders	112
2022-2023 and 2023-2024	Incoming Kindergarteners and Incoming 5th graders	112
2024-2025 and ongoing	Incoming Kindergarteners	56

As we offer a longer day and slightly longer year, we will partner with community-based organizations to ensure that our families have the resources that they need to stay engaged in learning opportunities throughout the summer and year. Partners may include the Kitsap Regional Library, Parks and Recreation, New Life Community Development Agency, Living Life Leadership, and/or Our GEMS/GENTS.

2. Extracurricular and Co-Curricular Student-Focused Activities

Catalyst will offer the following for scholars:

Activity	Frequency & Delivery Mode	Funding Source
Change-Maker Space	4 times per week embedded in school day – math enrichment, Science, STEM time	General budget
Targeted Learning Time	4 times per week embedded in school day – time for acceleration, homework help, and targeted intervention	General budget
Enrichment Courses	1 time per week – ~4 enrichment subjects per year	General budget and in-kind volunteer

Each of these programs is described in detail in **Section 4**.

Catalyst will work with the Bremerton School District (BSD) to determine fees for scholar participation in interscholastic programs and cover these fees out of general operating funds if a student wants to participate in a BSD-sponsored program.

3. Student Mental, Emotional, and Social Development and Health

Scholars' mental, emotional, and social development and health needs are met in a variety of our daily program offerings to support our mission of leader cultivation. Sunrise and Sunset Huddles are times each day during which scholars meet in a variety of small groups across different lines of affinity. Affinity groupings are culturally responsive because they enable students to gather in groups based on areas of their identity, to ensure that they have a space where their culture is validated and supported by peers and adults. DEI work is a through-line in our huddles and is the foundation for our (SEL) programming, starting with the self. Elementary scholars will participate in SEL courses where they explore elements of their identity and cultivate the habits of mind needed to be independent and collaborative learners. By middle school, scholars will learn principles of leadership and community organizing so that they are supported to take collective action to foster positive community change. The curricula in these courses will be aligned with that of our Change-Maker Space courses and students' yearly Passion Projects. Before each year begins, we will work with each scholar and their family to identify a minimum of four people to be a part of their Dream Team. This team will be assembled at conference time, for Passion Projects, and during other exhibitions of learning. In addition, this team will be assembled to provide support to a scholar when they need such a service. We will cultivate a partnership with Peninsula Community Health Services, an organization that offers mental, physical, and dental health to the community regardless of insurance status.

4. Outreach to Families Regarding Supplemental Programming

Catalyst ensures that all families are aware and take advantage of the opportunities we offer, and we use a culturally responsive means to inform families of the school's activities. This may include newsletters, automated and/or personal calls, text messages, home visits, Dream Team meetings, school meetings with faculty, Passion Project times, and other school events. We will provide communication, both written and verbal, in English and in the languages spoken in the homes of our scholars.

Section 10: Special Populations and At-Risk Students

1. Special Populations Plan

At Catalyst, all scholars are supported, held to high academic expectations, and are provided with the dynamic supports needed to reach these expectations; this is especially true for our scholars with disabilities, scholars from underserved socio-economic backgrounds, those designated as English Language Learners, those who are academically low-achieving, those who have been identified as intellectually gifted, and those who may be homeless or foster youth. By combining rigorous, standards-driven instruction with small-group instruction and a personalized approach to learning, we will meet the academic and behavioral needs of all of these scholar groups. We will provide a Free and Appropriate Public Education (FAPE) in compliance with all state and federal statutes, including Title II of the Americans with Disabilities Act of 1990 (ADA), Individuals with Disabilities Act (IDEA), Section 504 of the Rehabilitation Act of 1973, the Revised Code of Washington and the Washington Administrative Code. With their permission, Catalyst references the Special Populations plans of Impact Public Schools and Ashe Preparatory Academy, two approved charter schools designed to serve at-risk students.

Catalyst is committed to serving scholars in the least restrictive environment and will provide services to scholars through an inclusion model that acknowledges individual scholar needs. The following anchors of our model will ensure that we create an inclusive learning environment that meets the needs of all scholar subgroups:

a. A Culture of Inclusion, School Connectedness, and Social-Emotional Growth: Students in nurturing environments have higher chances of success in life. West-Ed’s Monica Mathur-Kalluri recently stated that, “...young children’s healthy development is dependent on strong, nurturing relationships — parent to child, caregiver to child, provider to parent.” She cites several recent studies, including the pivotal CDC-Kaiser Adverse Childhood Experiences Study (ACES) to make the case that poor socio-emotional development early in life puts children at high risk for health problems in adulthood, behavioral issues, and poor performance in school and work. She notes research that shows that having even a single close bond with a supportive adult in early childhood can positively change the life trajectory of a child.^{xxxix} These findings reinforce Catalyst’s commitment to creating a culture that is inclusive of all children’s needs and one that leverages connections between school staff, scholars, and families to ensure scholar success.

b. Effective Response-to-Intervention (RtI) Systems: At Catalyst we understand that many of our scholars have complex learning and socio-emotional needs. We aim to intervene quickly and early, based on data, to ensure that the needs of our scholars are met. All scholars will have access to our array of intervention supports as needed. We plan to establish scholar support teams and other groups to continuously review and reflect on scholar data and needs in order to determine the appropriate supports. Our Response-to-Intervention system is described in detail later in this section.

c. Rigorous Academics and Dynamic Supports: Catalyst dedicates significant time each day to specialized direct instruction for all scholars. This will happen during the small-group instruction, during the academic rotation portions of the school day, and during deeper learning blocks where scholars receive co-teaching, push-in, or pull-out services by special education and/or support staff to attend to individual scholar needs.

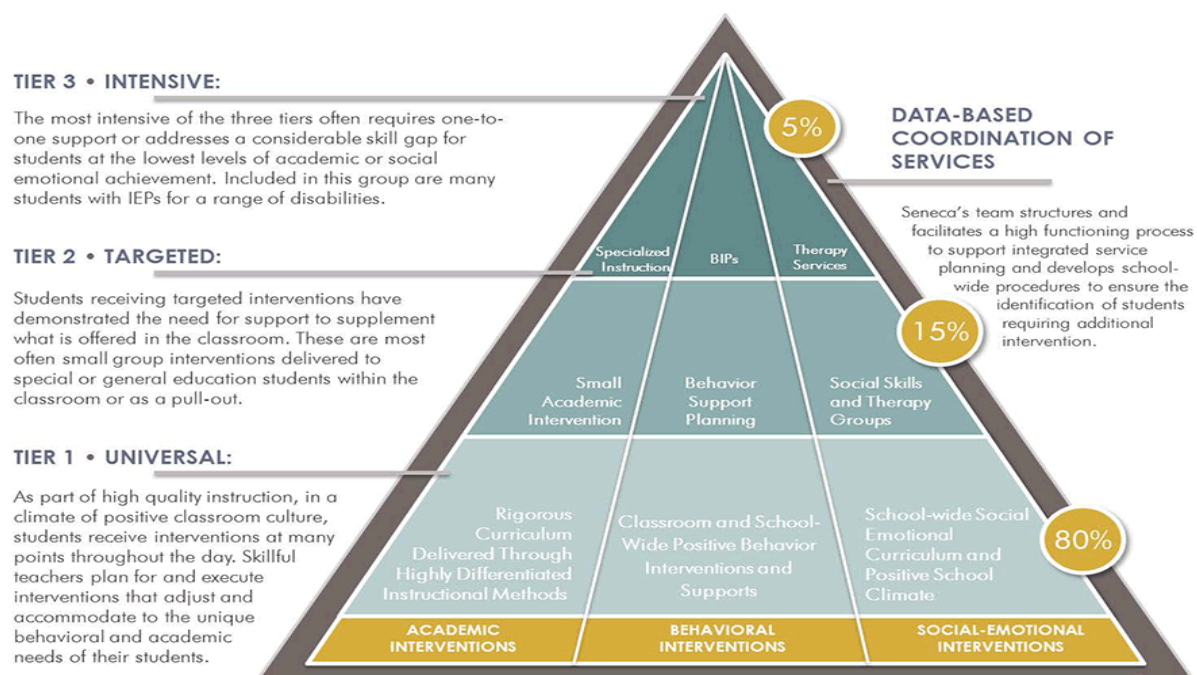
d. Scholar-Led Goal-Setting and Reflection: Each day scholars at Catalyst will meet in morning and afternoon huddles to set academic and behavioral goals and to reflect on their progress towards these

goals. Throughout the year, scholars will convene scholar-led Dream Team meetings where their community members will come together to explore the success and challenges of each scholar. This commitment to goal setting and reflection will ensure that all scholars can monitor their progress and make significant growth.

e. Effective Communication: At Catalyst, we communicate frequently with the families of every child to ensure that we can meet scholars' individual needs. Through weekly advisor touchpoints and via weekly academic and behavioral reports that will be sent home to families, we will ensure that issues are attended to early and often to ensure scholar success. We will also communicate with families in their preferred home language, to the extent possible.

f. A Consistent School-Wide Approach: Students from all subgroups benefit when they are educated in a thoughtfully-designed learning environment that is consistently implemented across the school. Catalyst is committed to ensuring that all of our scholars receive a free and appropriate education (FAPE) in the least restrictive environment (LRE) including scholars with mild, moderate, and severe disabilities. Because of this, many of our services will be provided to scholars within the general education setting, which will be staffed by teachers trained in universally designed learning and language acquisition strategies. Most elements of the Catalyst model are codified before the school launches, ensuring that academic and behavioral systems are thoughtfully planned, equitable, and based on research and best practices. Specific elements of our model will be school-wide and will result in the creation of an inclusive and supportive environment for all. These elements include: scope and sequences for all grade levels and content areas, common school schedule, inclusive co-teaching, culturally responsive curricula and instructional strategies, project-based learning, and flexible grouping of scholars. Taken together, this will create the least restrictive environment for special needs and at-risk learners.

g. Tiered-Service Model at Catalyst: Catalyst provides tiered services to ensure that all scholars receive just right and just-in-time supports. We follow a model of tiered intervention similar to that used by Seneca Family of Agencies, as summarized in the chart below:



At Catalyst, specific research-based interventions—that include modifications to course scope and sequence, modifications to daily schedule, and utilization of student and family support staff at each tier of support—are outlined below:

Tier	Academic	Behavioral	Social-Emotional
1 (Universal)	<ul style="list-style-type: none"> • Rigorous, standards-aligned instruction • Data-driven small-group instruction/academic rotations • Daily goal setting and reflection • Daily reading and math practice and direct instruction • Culturally relevant curriculum 	<ul style="list-style-type: none"> • School wide PBS system for behavior management • Restorative discipline practices and approach • Common behavior expectations and consistent staff practices 	<ul style="list-style-type: none"> • Weekly leadership and social-emotional courses for scholars • Frequent family communication • Community Engagement Manager to work with scholars and families
2 (Targeted)	<ul style="list-style-type: none"> • Designated intervention time during deeper learning blocks including targeted English Language Development time for English Learners and push-in supports for scholars with disabilities (SWD) • 1:1 instructional time with teachers during academic rotations • Additional small group instructional time • Instructional accommodations 	<ul style="list-style-type: none"> • Differentiated behavior plans • Additional check-ins with teacher and family • Behavior review and analysis with related action plan • Differentiated support and coaching plans for teachers around classroom management with specific scholars 	<ul style="list-style-type: none"> • Social skills groups • Affinity group meetings on specific SEL topics • Group meetings with social worker on staff
3 (Intensive)	<ul style="list-style-type: none"> • Individualized instruction via online playlists and other adaptive practice • Individualized learning plans with action plans • Specialized supports from learning specialist and other providers (speech and language, occupational therapy, etc.) • Modified curriculum 	<ul style="list-style-type: none"> • Functional behavioral assessment and behavioral intervention plan • Individual time with social worker • Connection of family to support services including therapy 	<ul style="list-style-type: none"> • Individual time with social worker • Connection of family to support services including therapy

2. Expected Student Populations

Catalyst will serve a scholar body that is equally or more diverse than our surrounding districts. We will actively recruit scholars from across all subgroups listed below as well as scholars who may not have found previous academic success in traditional school environments. The table below depicts our anticipated scholar population:

	%FRL	%SpEd	%ELL	%HiCap
Catalyst	62%	18%	6%	5%
Bremerton SD	62%	18%	6%	5%
State	42%	14%	12%	5%

See the chart above for description of how we will adjust our scope and sequence, daily schedule, staffing, support strategies, and resources to account for this scholar population.

3. Special Education

Academic results for scholars with disabilities lag not only locally but also across the nation. We know that scholars with disabilities are capable of much more, especially when they are provided services within an effective school model. At Catalyst, we leverage research and best practices to provide a high-quality and inclusive educational experience to scholars with disabilities. We will leverage the framework, and related research, developed by Innovate Public Schools to guide the development of our special education program. Tenets of this approach include the following:^{xi}



1. Believe in me



2. Include me



3. Find me



4. Catch me when or
before I fall



5. Meet me where I am and
challenge me



6. Know me



7. Involve me and
my family



8. Stick with me

Details regarding this framework and best practices associated with each of these elements are found in **Section 4: Attachment 4.**

Catalyst is committed to ensuring that all of our scholars receive a free and appropriate education (FAPE) in the least restrictive environment (LRE), including scholars with mild, moderate, and severe disabilities. Because of this, many of our services will be provided to scholars within the general education setting. Services will be provided via push-in and inclusive co-teaching. In some instances, when required by a scholar's IEP, we will provide pull-out services or alternative special education placements. All special education services at Catalyst will be provided by individuals or agencies as required by law. Catalyst is responsible for the hiring, training, contracting, and employment of staff necessary to provide special education services to scholars, including special education teachers, paraprofessionals, and resource specialists, as well as other service providers. The specific makeup of our special education staff will be re-evaluated each year based on scholar need. In our first year, we will hire one person with an administrative credential to oversee the compliance of our special education program, as well as one special education teacher, who will have a special education credential, to provide services to scholars. Additional services will be provided by specialists on a contract basis. In our early years we will partner with an organization such as Seneca Family of Agencies to ensure that we have the specialized staff that we need to serve all of our scholars. After our start up years we will build out a team internally to provide special education services to our scholars.

Catalyst will provide extensive professional development to all instructional staff to ensure that they are qualified to meet the needs of our diverse scholars, including those with special needs. Professional development will include training on each staff members' role in the creation, implementation, and evaluation of IEPs, along with best practices around working with scholars with special needs.

Catalyst will comply with all applicable federal and state laws in serving scholars classified with disabilities, including but not limited to: the Americans with Disabilities Act (ADA), Section 504 of the Rehabilitation Act (Section 504), the Individuals with Disabilities in Education Act (IDEA), the Revised Code of Washington (RCW 28A.155), the Washington Administrative Code (WAC 392-172A), and the policies of Catalyst. It is understood and agreed that all children will have access to the school and no scholar will be denied admission nor counseled out of the school due to the nature, extent, or severity of their disability or due to the scholar's request for, or need for, special education services. The school recognizes its legal responsibility to ensure that no qualified person with a disability shall, on the basis of disability, be excluded from participation, be denied the benefits of, or otherwise be subjected to discrimination under any program of Catalyst. Any scholar who has an objectively identified disability, which substantially limits a major life activity including but not limited to learning, is eligible for accommodation by the school.

Identification and Intervention

Catalyst is committed to ensuring the accuracy of any previous IEP, as well as serving scholars with IEPs immediately upon entering the school. When scholars are admitted to the school, we will use the information on the enrollment packet regarding IEP identification as the first way to identify scholars who may need additional support. For all newly enrolled scholars, Catalyst will also review the scholar's record from the previous school year to determine whether the scholar has previously been evaluated or classified as a scholar with special education needs. For scholars who enroll from another school with a current IEP, the school will conduct a transitional IEP meeting within 30 days. Prior to such a meeting and pending agreement on the new IEP, the school shall implement the existing IEP, to the extent practicable or as otherwise agreed between the school and the parent.

Throughout the school year, Catalyst's frequent internal assessment program (see **Section 5**) and RtI process provide efficient means to identify scholars who are struggling academically, in compliance with

the Child Find requirements of IDEA. Students who are struggling will be referred to the school's Student Services Team (SST) and pre-referral interventions will be provided to the scholar, as described earlier in this section. The SST includes a variety of school staff who meet at least twice a month to identify and discuss scholars in need of additional support. The team will include a mixture of staff members including general educators, special educators, a school leader or designee, as well as others as needed. The team will use interim assessment data as well as other data (discipline records, attendance data, work samples, teacher observation data, etc.) to determine the type of academic, behavioral, and social-emotional interventions that would be most appropriate. If initial interventions are not successful, the parents of the child will be asked to attend the meeting and additional interventions and supports will be implemented.

If pre-referral strategies are unsuccessful, the scholar is not progressing academically, and the school team believes a disability may exist, the scholar will be referred, in writing, to the evaluation case manager for individual evaluation and determination of eligibility for special education programs and services. Referrals may be made by any professional faculty member. A copy of such referral along with the procedural safeguards notice described in WAC 392 172A-03000 will be sent to the scholar's parents. The school co-founder or their designee will convene a meeting with the scholar's parents to discuss the option of psycho-educational testing to determine the child's special education eligibility and to secure written parental consent to conduct such testing. Testing will not begin until parent/guardian consent has been received. Once the tests have been conducted and the results are received, an eligibility meeting will be reconvened with the parents/guardians and applicable school staff. At that time, a decision will be made as to the scholar's eligibility for special education services. In compliance with WAC 172A-03005, evaluations and a decision about eligibility will be made within 35 school days after the date that written consent for the evaluation is provided by the parent. If the scholar is eligible for special education services, an IEP team will be formed that includes members outlined in WAC 392 172A-03095, and an IEP for that scholar will be developed within 30 calendar days.

Parents/guardians may also request an assessment for special education at any point throughout the school year. This request must be in writing. The school will have 25 days from the date that a written request is submitted to determine whether or not to evaluate the scholar. If the decision is made to assess the scholar, then the appropriate consents will be obtained from the parent and the process will proceed (in adherence to the timelines) as described above.

Catalyst is committed to ensure that all scholars in need of services are identified as early as possible. We are equally committed to ensuring that scholars are not over-identified or misidentified. As such, no single test or other factor will be used in isolation for determining if a scholar is eligible for services. When scholars enroll in the school with an existing IEP, the school will monitor their progress and implement appropriate assessments to determine that the IEP is needed and accurately written. We will also avoid over-identification and misidentification by providing our staff with appropriate professional development and by ensuring that our curriculum is relevant and culturally responsive to scholars and families.

Instructional Programs

In addition to the practices outlined above, Catalyst will utilize instructional programs such as STEP, NWEA MAP Growth data, as well as data from internally developed assessments that are part of the general education curriculum to identify student needs.

Monitoring and Evaluation

The academic, behavioral, functional, and social-emotional growth of scholars with mild, moderate, and severe disabilities will be consistently monitored throughout the school year. We will use informal and formal assessments to monitor growth related to academic standards and the scholar's IEP goals. Specific assessments that will be used are outlined in **Section 5** and **Section 5: Attachment 5** of this application. Students on IEPs will also participate in all appropriate state assessments, as dictated by their IEP.

Annual meetings of the IEP meeting will be held for each scholar, in accordance to IDEA and WAC 392-172A-03110. During these meetings the team will determine the effectiveness of services provided, determine whether annual IEP goals are being achieved, and revise the IEP as needed. Student progress on IEP goals will be shared with families at the same time as the general education progress schedule.

Exiting Services

Scholars will be exited from their services when sufficient data demonstrates that the scholar is able to meet or exceed the performance of their non-disabled peers and when the IEP team determines that services are no longer needed for the scholar to thrive academically. Parental/guardian consent will also be required when exiting scholars from services. When scholars are exited their progress will continue to be monitored to see if any interventions are needed for the scholar to be successful. This period will also allow the IEP team to determine if a reevaluation is needed at any point.

Section 504

Catalyst will efficiently identify all scholars protected under Section 504 including any scholar determined to (1) have a physical or mental impairment that substantially limits one or more major life activities, (2) have a record of such impairment, or (3) be regarded as having such impairment.^{xlii} If staff or families feel that a scholar may qualify for protections under Section 504, they will make a referral to the SST. For any such scholar, the school will comply with regulations outlined in the Section 504 regulatory provision at 34 C.F.R. 104.35(b) in individually evaluating a scholar before deciding regarding their disability status. 504 plans will be reviewed at least annually.

Staffing for Special Education

Services will be provided via push-in and inclusive co-teaching. In some instances, when required by a scholar's IEP, we will provide pull-out services. All special education services at Catalyst will be provided by individuals or agencies as required by law. Catalyst is responsible for the hiring, training, and employment of staff necessary to provide special education services to scholars, including special education teachers, paraprofessionals, resource specialists as well as other service providers. The specific makeup of our special education staff will be re-evaluated each year based on scholar need. In our first year, a school co-founder (who holds an administrative credential) will oversee the compliance of our special education program and special education teacher to provide services to scholars. Additional services will be provided by specialists on a contract basis. In our early years, we will partner with an organization such as Seneca Family of Agencies to ensure that we have the specialized staff that we need to serve all of our scholars (see **Section 15** for example Seneca partnership details). After our start-up years, we will build out a team internally to provide special education services to our scholars.

English Language Learner Students (ELLs)

Catalyst will develop, implement, and maintain policies and procedures for the provision of services to ELLs in accordance with guidance published by the Office of Civil Rights of the U.S. Department of Education and regulations presented in WAC 392-160.

a. Identification

In accordance with WAC 392-160-015, Catalyst will conduct a home language survey with all families registering new scholars. The survey will ask two questions: (1) Is a language other than English spoken in your home? (2) Is your child's first language a language other than English? If the answer to Question 2 is yes, the scholar will be tested for eligibility for the transitional bilingual instructional program (TBIP). Initial screening will take place no later than 10 school days after a scholar registers and commences attendance at Catalyst.

Students will complete the ELPA21 placement test to determine their eligibility for TBIP services. Catalyst will notify all parents of its responsibility to administer the ELPA21 and report the results within 30 days of receiving them.

Scholars who receive a score of three or above on the ELPA21 will receive ELL supports provided in the general education classroom. ELLs who score below a three will receive more intensive interventions.

b. Alternative Instructional Program

Catalyst provides a comprehensive program to support the academic and social-emotional growth of ELL scholars. As is the case with all of our scholars, ELL scholars will be served, to the extent appropriate, via our inclusion model. Many of the existing elements of our model will be beneficial to our ELL scholars and we will offer additional supports specifically tailored to their needs. A transitional bilingual instructional program will likely not be practicable for Catalyst to provide. The staffing requirements of offering instruction in two languages and the cost of supporting such a program for the size of scholar population we anticipate is not practicable at this point. Therefore, we will provide an alternative instruction program (AIP) to support our ELL scholars as permitted by (WAC 392-160-040). Catalyst's program will provide sheltered instruction in the general classroom environment with specific ELL supports.

These supports include:

Core to Catalyst Model	Specifically Designed Supports for ELLs
<ul style="list-style-type: none"> • Schoolwide routines and procedures to build consistency of scholar experience • Schoolwide scope/sequences for all content areas and grade levels • Schoolwide culture of inclusion • Small group instruction + academic rotations • Data driven instructional practices and flexible scholar grouping • Habits of Discourse framework to encourage peer to peer communication • Culturally responsive curricula and teaching practices • Cooperative and project-based learning opportunities • Student-led Dream Team meetings • Daily opportunities for goal setting, reflection, and mentoring • Affinity groups 	<ul style="list-style-type: none"> • Integration of daily language objectives, taken from the English Language Proficiency Standards, into all lessons with objectives clearly posted in classrooms • Designated English Language Development blocks for scholars as part of academic rotations • Sheltered instruction across the content areas using the SIOP model • Newcomers small-group instruction • Scope and sequence documents aligned to WA ELP standards <p>Staff professional development around meeting the needs of ELLs</p> <p>More intensive interventions can include:</p> <ul style="list-style-type: none"> • Being placed in a classroom with a bilingual teacher who speaks the child's home language • Pull-out instruction from a staff member with appropriate credential • Online adaptive ELL reading, writing, speaking, and listening supports such as Imagine Learning and Lexia

c. Monitoring, Evaluation, and Exiting

Catalyst's culture of data-driven practices will ensure that the progress of ELLs is consistently reviewed and that modifications to scholars' placement is made in a timely manner and is based on reliable scholar achievement data. Diagnostic data for scholars will be based on the ELPA21 as well as internally created and nationally normed literacy assessments. The ELPA21 will be administered in the fall and the spring, except for scholars with significant cognitive delays, who are eligible to take the alternate assessment. Data for reading, writing, listening, and speaking will be gathered to create a clear understanding of scholars' proficiency and their specific needs. Students who are exited are also monitored closely for two years to ensure that there is no regression or need for additional services.

d. Staffing

Catalyst will hire a teacher who has the appropriate ELL certification to monitor ELL achievement, assessments, and to provide support to scholars and families as needed throughout the school year. Extensive professional development will be provided to all content area teachers around effective sheltered instructional practices as well as other methods to meet the needs of ELL scholars.

e. Parent Communication and Notification

Catalyst will meet all parent/guardian notification requirements for families of ELLs as required by WAC 392-160-015. Specifically, Catalyst will provide families with information regarding procedures for reclassification when they are mailed the ELPA21 scores of their children. Catalyst will also ensure that

parents of ELL scholars have a strong and active voice in the ongoing programming provided to their children. We will hold frequent meetings with the school's English Language Support Group, a group of school staff and families of ELL scholars. We will also gather feedback from families through efforts such as focus groups and surveys.

Catalyst will also provide language assistance to parents by having bilingual or multilingual staff members who can assist families, as needed. When not possible to provide this assistance via a staff member, Catalyst will leverage high-quality outside service providers through the True Measure Collaborative. Catalyst will also develop a process to determine the specific language needs of families as they arise.

Notification of a scholar's classification as an ELL will be provided to parents in their primary language and will include:

- The reason for identification of the child as an ELL;
- The child's level of English language proficiency, how the level was assessed, and the status of the child's academic achievement;
- Methods of instruction used in the program and other available programs;
- How the program meets the educational strengths and needs of the scholar and how the program will help the scholar achieve English language proficiency;
- Exit requirements for the program;
- For ELLs with a disability, how the program meets the annual goals in the child's individualized educational program; and
- Information regarding parents' rights to withdraw the scholar from a program upon request and how to decline enrollment or choose another program.

Homeless and Foster Youth

Homelessness and housing instability are growing challenges in Kitsap County and across Washington State. In 2018, one in 150 individuals in Kitsap County were homeless.^{xlii} Students who are, or are at risk, of being homeless need specialized supports to ensure their academic success.

Catalyst will follow all provisions of the McKinney-Vento Homeless Assistance Act. We will identify scholars who are homeless via our intake process for new scholars and train a staff member to be the McKinney-Vento Liaison. This screening process will be repeated for returning families each year to see if their housing situations have changed over the course of any given year. Through this screening process we will identify scholars as homeless if they meet any of the following conditions:

- Sharing housing due to loss of housing, economic hardship, or similar;
- Living in motels, hotels, trailer parts, etc. due to lack of alternative accommodations;
- Living in emergency or transitional shelters;
- Abandoned in hospitals or other emergency locations;
- Primary residence not ordinarily used as a regular sleeping place;
- Living in cars, parks, public spaces, substandard housing, etc.; or
- Migratory children and youth living in any of the above situations.

Catalyst will honor the rights of homeless scholars by ensuring that they can attend their school of origin, have no barriers to enrollment, are provided with transportation, and have access to all programs and services offered by their school of origin.

Catalyst will also provide supports to scholars who are in foster care and will follow all applicable state laws regarding foster youth. The school will use the CEDARS data system, a Caregiver Authorization form, a School Notification form, or a court order to identify scholars in foster care, adhering to required confidentiality practices with these records. We will also designate a Foster Care Liaison, who will support foster youth and their families and who will attend OSPI trainings to ensure that best practices are utilized.

Catalyst will meet the needs of foster and homeless youth through increased communication to parents/guardians as well as other stakeholders (social workers, case managers, support providers) and by ensuring that barriers to attending and excelling at school are as limited as possible. Students who are designated as homeless or foster youth will be eligible for free uniform pieces and school meals and will be prioritized for social-emotional and mental health supports as needed. We will also evaluate our program and procedures annually to ensure that none of our practices are unintentionally putting homeless/foster youth at a disadvantage to other scholars.

At-Risk Students

a. Identification

At the beginning of each school year, Catalyst staff will complete an intake inventory for all scholars. This screening process will identify any scholars who could fall into the “at-risk” category as defined by RCW 28A.710.010(2), including scholars with academic and/or economic disadvantages such that additional supports and services are required for the scholar to be successful. Students who are flagged as potentially at-risk based on the intake inventory will be monitored closely at the beginning and throughout the school year. Students identified as high-risk may demonstrate any of the following characteristics (list not exhaustive):

- Students who are more than one grade level behind in English language arts or mathematics, as measured by internally created and/or nationally-normed assessments;
- Students who are not yet proficient in reading, writing, speaking, or listening in the English language;
- Students who have a history of chronic absenteeism (more than 8 unexcused absences in any given school year);
- Students who have medical issues that prevent them from thriving at school, including mental health issues;
- Students who have special education needs; or
- Students who are homeless or are at-risk of being homeless.

Scholars who are identified as at-risk will receive supports (as described below). Their progress will be monitored via Catalyst’s data-driven practices and their status will be reevaluated on a regular basis to determine if progress is being made. In specific instances, scholars who are at-risk who are not making progress will be referred to the school’s SST team for review.

b. Programming

The inclusive, scholar-centric nature of the Catalyst model is uniquely positioned to serve at-risk scholars effectively. Mounting research supports the notion that scholars deemed at-risk benefit when schools build scholars’ sense of self and foster meaningful connections with others. In fact, research shows that schools can better serve at-risk scholars by leveraging the following six practices:^{xliii}

- Making innovations to traditional classroom instruction, including making the learning environment more inclusive;

- Supporting scholars through transitions from home to school and transitions they experience as part of their lives (divorce, moving, trauma, etc.);
- Connecting families to the school and scholars' activities;
- Making the most of community resources to support scholar development;
- Creating nimble systems for crisis response and prevention; and
- Improving links to mental health and behavioral services.

Additionally, we know that the success of many at-risk scholars is contingent upon the belief system that teachers hold for their potential and the extent to which scholars are provided with rigorous coursework that will allow them an opportunity to thrive.^{xliv} We are committed to hiring staff who can genuinely uphold high expectations for all scholars and make our curriculum accessible to all scholars.

Highly Capable

Identification

Scholars at Catalyst will be deemed highly capable if they have been assessed to have superior intellectual ability as demonstrated by the criteria in WAC 392-170-040. Annually, Catalyst will use assessments in every grade level that are language neutral (Cognitive Abilities Test or similar) as well as internal assessment data, teacher observation, rubrics, and work samples. Catalyst recognizes that, historically, identification processes regarding highly capable designation have often left out, or marginalized, scholars along lines of race, class, or other elements of their identity. Our staff will receive support and development around identifying and interrupting this type of bias and our staff will regularly review qualitative and quantitative data when scholars are referred to ensure that all scholars who may qualify are identified. We will also review data, at least annually, to identify patterns of over- and under-representation.

a. Programs

Teachers will differentiate the curricula for highly capable scholars during several portions of the school day including small group instruction/academic rotations and the Change-Maker Space portion of the day. During these portions of the school day teachers will facilitate deeper and extended learning, based on scholar achievement data and interests. Specific Catalyst structures to support highly capable scholars include:

- Personalized and adaptive online learning programs in all content areas,
- Small group instruction and academic rotations differentiated based on scholar level,
- Yearly passion projects that are differentiated based on scholar skill level and interest, and
- Sunrise mentor time and affinity groups.

b. Monitoring and Evaluation

The progress of scholars who are highly capable will be assessed regularly via performance on standardized assessments as well as internal assessments, teacher observation, and performance as measured by school rubrics.

c. Staffing

Teachers at Catalyst are supported through professional development to meet the needs of diverse scholars, including scholars who are highly capable. Catalyst will take advantage of much of the research and learning that is being released through OSPI's recent HiCap Plus pilots that have taken place across Washington. Key elements of staff development for serving highly capable scholars will include effectively

identifying, serving, and evaluating highly-capable scholars and will also include extensive development of research-based instructional strategies that are effective for engaging and meeting the needs of highly capable scholars.^{xlv}

Military Families

Bremerton is one of a handful of bases across the country where military families with students who have disabilities are placed, due to the proximity to pediatric health-care and related services. Because of this, and the overall military presence in the region, Catalyst will likely serve a significant number of military families and their children. Scholars whose parents /guardians are part of the military have unique needs that must be addressed at school. We have developed a relationship with the Navy Base Kitsap School Liaison Officer to ensure that we are able to take advantage of resources that they offer for families and for development opportunities for our school staff. Many military families move between 6 to 9 times over the course of their scholars' educational careers, leading to significant interruptions in their education.^{xlvi} This, coupled with the stress of moving and inconsistency of academic quality and rigor from school to school, can negatively impact these scholars. Additionally, scholars of military families have unique social and emotional needs. Often these scholars must face the stress of having a parent or guardian deployed for long periods of time and must learn to adjust to new communities and schools frequently.

Many of the core elements of the Catalyst model (see **Section 4**) provide consistency, warmth, and social-emotional supports that will particularly benefit these scholars and their families. We also will take advantage of resources and professional development opportunities offered by the Military Child Education Coalition to ensure that we continually improve our ability to serve military families and their scholars.

Section 11: Student Recruitment and Enrollment

1. Student Recruitment Plan

Catalyst has engaged with community throughout our planning (see **Section 1** and **Section 2**, and **Section 2: Attachment 2**). Student recruitment and enrollment begins by building deep and meaningful relationships with children, their families, and other stakeholders. Catalyst is a school that will serve many of Bremerton and Kitsap Counties' highest-needs scholars. Thus, our recruitment plan is tailored to ensure that we reach out to families across lines of race, ethnicity, national origin, gender, socioeconomic status, language preference, special education requirements, sexual orientation, and level of academic preparation.

Recruitment materials highlight our mission, vision, and core values and describe key elements of our school model. Materials are translated into predominant languages spoken in the community and, whenever possible, teams leading recruitment efforts include at least one individual who is bilingual in English and Spanish. The fastest growing group of immigrants to our region of Kitsap County are indigenous Guatemalan families, many of whom do not speak English or Spanish. We are leveraging resources provided by community-based organizations (CBOs) to secure interpreters to assist us in working with these families.

Equity-driven recruitment requires a two-pronged approach—organizing community events to which families are invited, along with visiting places where families already convene—to ensure we are reaching all families. Recruitment is led by Catalyst co-founders with support from parent leaders, advisors, and board members. Our focus on equity and inclusion serves as a reminder to ensure efforts are culturally inclusive and responsive. Thus, all individuals supporting recruitment work, including our board members, are racially, ethnically, and socio-economically diverse and represent the community. These individuals receive support and training from Catalyst co-founders and/or the Family and Community Engagement Team from the Washington State Charter Schools Association to ensure they approach the community in a responsive manner. This work includes strengthening relationships with community-based organizations including: the Kitsap Immigration Assistance Center, Kitsap Regional Library, New Life Community Development Agency, Our GEMS/GENTS, Kitsap County Parent Coalition, Holly Ridge Center, and others.

Strategies include:

- **Outreach to key community organizations:** We attend events and do outreach at community service providers and other CBOs whose mission is to serve families in need.
- **Canvassing, door-knocking, and home visits:** We hold door-knocking and community flyering events regularly to ensure that we are spreading the word about Catalyst in target neighborhoods. We also schedule 1:1 meetings or home visits with families that express interest in learning more about the school.
- **House meetings:** Catalyst parent leaders hold meetings in their homes with friends and neighbors to cultivate interest in the school.
- **Scholar-friendly activities:** We host events to engage with families and attend family-friendly events hosted by community partners.
- **Marketing:** We leverage traditional and electronic methods to market our school to diverse audiences. Methods include leaving flyers and other collateral and community places of interest, direct mail, event listings via traditional methods and social media, targeted Facebook advertising,

email, and pushing information via our website and social media presence. Google analytics, and other data analytics, are leveraged to ensure that we reach our target communities.

2. Enrollment Policy

The Catalyst Enrollment Policy (**Section 11: Attachment 7**) details specific enrollment plans, including timelines and processes that ensure equitable recruiting practices. A sample application for admission is also included. Catalyst will comply with all Washington requirements regarding legal, fair, and equitable treatment of all families interested in applying to the school. Each year, Catalyst will review its racial and ethnic balance and its policies to determine which are the most effective in enrolling and retaining a diverse student population.

Section 12: Student Discipline Policy and Plan

At Catalyst, our commitment to putting DEI at the center of all we do defines how our educational program is developed; it guides how we cultivate a culture of community, belonging, and connection. The Catalyst approach to student discipline puts the voices and needs of scholars and families at the center, and utilizes a variety of equity-centered, culturally responsive, and trauma-informed practices to ensure that disciplinary efforts restore the mutual trust and respect needed so that students are fully integrated into the school community, even after breaches of school norms have occurred.

For too long, overly punitive and exclusionary discipline practices have not only put student success at risk but have led to the development of the school-to-prison pipeline. Beginning in the early 1990s, the use of exclusionary discipline rose, as the focus of national education policies prioritized school safety and increasing student achievement, especially among traditionally underperforming sub-groups of students. While ensuring student safety and prioritizing academic success are noble pursuits, there have been unintended consequences of these shifts in policy and practice that are still negatively impacting students to this day, particularly students of color and students with disabilities.

Catalyst reverses this trend and serves as a model for how schools can partner with scholars, families, and other community members to ensure that students are supported emotionally and behaviorally as needs arise. Catalyst follows the Office of the Superintendent of Public Instruction's recently adopted discipline policies per Chapter 392-400 WAC, so that there are limits on exclusionary discipline practices and to ensure that students' due process rights are followed.

1. The Catalyst Approach to Discipline: Creating a Culture of Hope, Connection, and Accountability

Hope and connection are pillars of the Catalyst approach to student discipline. At Catalyst, we know that ensuring all of our students have a strong sense of hope for what is possible in their lives, regardless of current or past circumstances and experiences, is vital to creating a culture where students can thrive. We also know that students must feel strongly connected to their school and community, and to the adults within, to establish the type of meaningful and deep relationships needed to succeed. Cultivating a strong sense of hope and connection moves beyond what many schools do to develop grit and a growth mindset. A key difference at Catalyst is that we not only help students understand how they can leverage their effort to grow and improve over time, we also support them as they develop a deep understanding that, while challenges will come along in life, they have the agency and power to overcome them, *and* adults within the schoolhouse will reliably serve as allies to them. In short, we build a culture of hope and connection by ensuring that students understand that not only will tomorrow be a better day, but it will be because they have the agency and support to make it so.

All of our scholars, regardless of background, have unlimited potential and must be held to incredibly high academic and behavioral expectations. Decades of research and the lived experience of many students prove that the beliefs held about a student's ability impacts their performance and achievement. Thus, we demand that our school staff set and maintain high expectations for scholars and we provide the social, emotional, and behavioral supports so that our students can meet these expectations every day. Our discipline policy reflects this commitment and provides students with an array of supports, as well as positive incentives, to foster student success.

Catalyst believes that an approach to school discipline should be built in partnership with students, families, and community. Catalyst founders spent significant time working with members of the

community and diverse community groups to co-create an approach to student discipline. We have incorporated learnings from Kitsap Strong, a local organization dedicated to the integration of trauma-informed practices into schools, as well as learnings gathered via student empathy interviews and from community organizations who work with youth, such as Partners for Youth Achievement and Our GEMS/GENTS. We also received feedback on our approach to discipline and building community from the Bremerton community group Civil Survival, a grassroots organization of formerly incarcerated individuals who have a strong point of view on what schools can and should do differently to reduce the school-to-prison pipeline.

The tenets of our discipline policy (see **Section 12: Attachment 8**) were created in partnership with families and community; they reflect our pillars of hope and connection.

A Focus on Equity Through Data and Action

As mentioned, an over-reliance on exclusionary discipline unfairly impacts students who have been traditionally marginalized. We recognize this trend and have built an inclusive, restorative, and culturally responsive approach to school discipline that excludes students as a last resort or when student or school safety is in immediate jeopardy. To achieve this goal, and to ensure that no subgroups of students are disproportionately impacted by school discipline, we work with our staff to understand and dismantle bias and oppression in all forms, especially as they relate to issues of student discipline. We will leverage principles from the Equity Literacy for All framework described by Gorski and Swalwell as we build and implement structures to routinely review, monitor and action plan around student discipline data. Examples of this framework and how it will be leveraged to ensure equitable student discipline practices are below.

Framework	Evidence of Practice in Data Review and Practice
<i>Recognize</i> even subtle forms of bias, discrimination, and inequity	<ul style="list-style-type: none"> • Are specific subgroups receiving disproportionate positive or negative consequences? • Are specific teachers over- or underutilizing discipline and are there any trends across lines of identity or status? • Are any school norms, rules, or expectations disproportionately impacting certain groups of scholars?
<i>Respond</i> to bias, discrimination and inequity in a thoughtful and equitable manner	<ul style="list-style-type: none"> • Built-in time in data meetings to explicitly raise and discuss issues of bias and to generate solutions-based dialogue • Transparently report any data trends regarding disproportionality to key stakeholders including staff, families, board

Framework	Evidence of Practice in Data Review and Practice
Redress bias, discrimination, and inequity, not only by responding to interpersonal bias, but also by studying the ways in which bigger social change happens.	<ul style="list-style-type: none"> Professional development for all staff regarding identifying, dismantling, and interrupting bias, discrimination and oppression Professional development around institutional and structural racism/oppression and discussions of dismantling oppression in all its forms
Cultivate and sustain bias-free and discrimination-free communities.	<ul style="list-style-type: none"> Ongoing conversations about equitable scholar discipline and restorative practices Ongoing review of discipline data using an equity lens and framework

Scholar discipline/culture data will be reviewed regularly to identify students who are excelling and those in need of additional support. Teams will norm on the use of an equity lens, remembering that the purpose of examining data is to identify and interrupt instances where the school is seeing disproportionate discipline used with certain groups of scholars. These data meetings will yield action and support plans for individual scholars as well as for any groups of scholars who are struggling. The data will also be used to develop professional growth and support plans for teachers who need additional support in classroom management and/or relationship building with students. **Section 12: Attachment 8** provides more detail about the frequency and content of these data meetings.

Scholar discipline data will be shared with families via progress and behavior reports that are sent home each week. Scholars will also have the opportunity to review their data weekly and complete a written goal-setting and reflection template so that they can identify positive trends in their behavior and set goals for improvement. Families will also receive frequent communication from their scholar's advisor to ensure school/family dialogue around behavior occurs.

Catalyst Discipline Policy and Section 12: Attachment 8

The Catalyst discipline policy was informed by community partners focused on trauma-informed practices and elimination of the school-to-prison pipeline:

- Kitsap Strong/Graduate Kitsap
- Civil Survival
- National Center for Restorative Justice
- Seneca Family of Agencies
- Trauma-Informed Educational Practices

Section 12: Attachment 8 includes the full Catalyst discipline policy and associated documents, including:

- Processes to promote equitable and fair practices, including penalties for infractions and incentives for positive behavior
- A list and definitions of discretionary and non-discretionary suspensions and expulsions
- An explanation of how the school will ensure the rights of students with disabilities in disciplinary actions and proceedings
- Procedures for due process and appeal processes

2. Informing Parents/Guardians of the Catalyst Discipline Policy

Families will receive a copy of the Catalyst discipline policy in their preferred language prior to the start of each academic year. The policy will be reviewed with families during family orientation nights, which will occur during the month before school starts each school year. The discipline policy will also be posted for families via the school's website and/or family online portal and will be included in the school's scholar and family handbooks. Scholars who enroll after the start of any school year will receive the policy during Catalyst Kickstart.

Section 13: Educational Program Capacity

1. Leadership Team Capacity

Catalyst is led by experienced co-founders Amanda Gardner and Tatiana Epanchin, who have both led high-performing schools serving predominantly low-income students of color.

Ms. Gardner was the founding principal of two schools in Boston, Massachusetts and the Vice President, Schools at Innovate Public Schools, where she designed and led Innovate's Start-Up Schools Fellowship and Entrepreneur-in-Residence programs. Both programs recruit leaders from diverse backgrounds to launch high-performing and innovative schools in partnership with the families their schools will serve.

Ms. Epanchin was a teacher, a social worker, and the principal of two schools in Oakland, California, and the Superintendent for Aspire Public Schools: Bay Area. She served as a Senior Vice-President of Regional Operations at Teach for America and co-founded School Leader Lab in Washington, D.C. (Resumes are provided in **Section 13: Attachment 10**).

The co-founders are supported by a board experienced in growing and developing high-performing schools. Each teammate brings strong skills and together, the total team has both the commitment and capacity to deliver and implement the school foundation and design.

2. Team Collective Qualifications

Position	School Leadership, Administration, Governance	Curriculum, Instruction, Assessment	Performance Management	Cultural Competence/DEI	Family and Community Engagement	Special Populations
Co-Founder/CEO and Head of Middle School, Amanda Gardner	X	X	X	X	X	X
Co-Founder/CAO and Head of Elementary School, Tatiana Epanchin	X	X	X	X	X	X
Board Chair, Julie Kennedy	X	X	X	X	X	X
Board Member, TyKera Williams				X	X	X

Position	School Leadership, Administration, Governance	Curriculum, Instruction, Assessment	Performance Management	Cultural Competence/DEI	Family and Community Engagement	Special Populations
Board Member, Katie Nesmith-Singh		X	X			
Board Member, Amy Kiyota	X		X	X	X	
Community Engagement Manager TBD				X	X	
Office Manager TBD			X	X	X	
Director of Finance and Operations TBD	X		X	X	X	X

3. Community Relationships

Amanda Gardner and Tatiana Epanchin have built strong ties to and knowledge of the target community over the course of the past 18 months. They have held two Community Forums and five Design Team meetings from which they are leveraging participants to take part in community outreach and engagement. Gardner and Epanchin are active members of the following organizations, which broaden their knowledge of the region:

Organization	Role	Co-Founder
Our Gems	Volunteer	Gardner
Kitsap Council for Human Rights	Board Member	Gardner
Juneteenth Planning Committee	Volunteer	Gardner
Democrats for Educational Reform	Advisory Board Member	Gardner
Impact Public Schools	Board Member	Epanchin

Both Ms. Gardner and Ms. Epanchin have built deep connections to people and organizations in the wider Puget Sound through their work with the Washington State Charter Schools Association, University of Washington Danforth School of Education, and Green Dot Public Charter Schools.

4. Partnerships

The following organizations are partnering with us to plan and establish Catalyst: Bremerton:

Partner	Role (Includes Current and Planned)	Resources (Includes Current and Planned)
NewSchools Venture Fund	Investment in Catalyst Public Schools as a NewSchools Invent grantee	<ul style="list-style-type: none"> Start-up grant Technical support Cohort learning and collaboration Coaching
Charter School Growth Fund	Leading due diligence efforts for an investment in Catalyst Public Schools and providing technical support	<ul style="list-style-type: none"> Possible funding Technical support Thought partnership and mentoring
WA Charters	School Design/Launch Support	<ul style="list-style-type: none"> Training Community Engagement Advocacy True Measure Collaborative
Olympic Educational Services District	Back-Office Support	<ul style="list-style-type: none"> Fingerprinting Compliance set-up/training Year 1 service planning

Catalyst is supported by a group of advisors who volunteer their expertise and who are pivotal to our deep understanding of the local context. Currently, none will assume planned roles, though we aim for some of them to join our board in the future.

Name	Organization	Role	Expertise
Shaylynn Houston	Seattle Goodwill	Equity Team Leader/Specialist	Diversity, equity and inclusion (DEI) Adult learning
Harriette Bryant	Our Gems	Founder and Senior Mentor Coordinator	Community and family engagement
Vicki Collins		Mentor Coordinator	

Name	Organization	Role	Expertise
Elise Darwish	Ensemble Learning	CEO and Founder	K-12 charter school launch and sustain experience, ELL, school leadership
David Herrera	New Teacher Center	Senior Director, School Leadership	School leadership, professional development
Ben Klasky	Giving Compass	CEO	Organizational leadership, education, fundraising
Martitha May	Kitsap Immigrant Assistance Center	Executive Director	Family engagement, community advocacy
Cheryl Nunez	Olympic College	Vice President for Equity and Inclusion	Diversity, equity and inclusiveness, community leadership and organizing
Darryl Riley	Small Business Owner	Owner	Community outreach
Karen Vargas	Living Life Leadership	Kitsap Community Activist	Community organizing
Noah Wepman	New Leaders	CFO	Finance, operations
James Wilcox	Strategic Growth Partners	President and CEO	Facilities, charter school management and leadership, finance, operations

5. School Leader Capacity

In years one and two, Ms. Gardner will lead the middle school and Ms. Epanchin will lead the elementary school. They have a proven track record of excellence and deep experience in leading schools over the K-12 continuum. Each of the schools led by these founders accomplished great results for students. Achievements include:

- Aspire: Monarch Academy: Increase of 150 API points, EPIC: Gold, EPIC: Silver, National Title One Distinguished School
- Aspire: ERES Academy: Increase 100 API points in a single year
- Boston Preparatory Charter Public School: 100% of graduates have enrolled and matriculated into 4-year colleges and/or universities and just over 85% of graduates are persisting in college, EPIC: Gold
- UP Academy: Ranked #1 in the state of Massachusetts for student growth in mathematics and received a commendation from the state for narrowing gaps and high progress

With their deep experience, they bring a relentless focus on equity, instructional leadership, school culture building, and social-emotional learning. In Year 2, they will begin a search for the next school leader, who will be K-8 leader in Year 3.

6. School Leadership and Management Team

Once Catalyst is approved, the school will be developed and led by the following team:

Role	CMO or Catalyst: Bremerton	Name (If Known)	Commitment	Start Date	Compensation Source or Hiring Plan
Co-Founder; Head of Middle School	Catalyst: Bremerton + CMO	Amanda Gardner	Full Time	July 2019	WA Charters School Leadership and Design Fellowship WA Charters Planning Grant NSVF Grant
Co-Founder; Head of Elementary School	Catalyst: Bremerton + CMO	Tatiana Epanchin			
Community Engagement Manager	Catalyst: Bremerton	TBH	Full Time	May 2019	NSVF Grant
Office Manager	Catalyst: Bremerton	TBH	Full Time	January 2020	NSVF Grant
Director of Finance and Operations	Catalyst: Bremerton	TBH	Full Time	January 2020	NSVF Grant

See **Section 13: Attachment 10** for a job description and hiring process for the Director of Finance and Operations, the Office Manager, and the Community Engagement Manager.

The timeline will be as follows:

Role	Recruitment	Screening	Interviews	Simulation Day	Offer	Start Date
Community Engagement Manager	January 2019-March 2019	April-May 2019	May-July 2019	May-July 2019	July 2019	August 2019
Office Manager						

Director of Finance and Operations	August-September 2019	October 2019	November 2019	November 2019	December 2019	January 2020
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Recruitment Process

To ensure a diverse pool, we will utilize strategies to ensure we are open to diverse talent. In November 2018, the co-founders trained with John Scott, DEI at the Seneca Family of Agencies, to put hiring practices into place that will attend to DEI.

The co-founders will leverage relationships with people on the Design Team and from community forums, in addition to advertising on the school's website and Facebook page. The co-founders are responsible for these hires and will gather input from diverse stakeholders during the simulation day when candidates will demonstrate their knowledge, problem-solving aptitude, and commitment to the Catalyst Public Schools mission and vision.

CATEGORY 4: OPERATIONS PLAN AND CAPACITY

Section 14: Legal Status and Governing Documents

1. Legal Status

Catalyst Public Schools (CPS) constituted itself as a Washington nonprofit corporation pursuant to Washington law on November 26, 2018. CPS has also filed for 501(c)(3) tax-exempt status with the Internal Revenue Service; our status is pending review. CPS's Articles of Incorporation state:

2.01 Charitable purposes: The Corporation is organized exclusively for charitable, scientific, literary, or educational purposes within the meaning of 501(c)(3) of the Internal Revenue Code of 1986, as amended, or corresponding provisions of any subsequent federal tax laws, as designated in the Restated Articles of Incorporation, filed with the Secretary of State on November 26, 2018, and as amended thereafter.

2. Legal Documents

Catalyst: Bremerton will be operated by CPS. CPS will be governed by the corporate bylaws adopted by the CPS board, which are consistent with the terms of this charter and all other applicable laws. CPS's governing documents are included as **Section 14: Attachment 11**.

During the first two years of the school's operation, CPS co-founders, the Community Engagement Manager, and the Director of Finance and Operations will be on the staff of Catalyst: Bremerton. They will provide financial and operational leadership to the school as well as professional development and instructional leadership and management. In Year 3 of the school's operations, Catalyst Public Schools staff will be distinct from Catalyst: Bremerton, and these leaders will join the CPS staff. CPS will provide charter management services to Catalyst: Bremerton via a Memorandum of Understanding between CPS and the principal at Catalyst: Bremerton.

3. Subsidiaries and Business Endeavors

There are no subsidiaries owned or affiliated with the nonprofit submitting this application. The nonprofit that is submitting this application is not involved in any other organizational/business endeavor.

4. Growth Plans

Catalyst: Bremerton will be the first charter school operated by the charter management organization Catalyst Public Schools. CPS's 5-10 year growth plans include operating two schools in Kitsap county, a K-8 (Catalyst: Bremerton) and a high school, tentatively opening in school year 2023, to serve students in the same community, serving approximately 750 scholars when fully launched. This location was identified based on student academic outcomes, population growth, and need for diverse school choices. Reaching this scale ensures that a significant percentage of scholars in these counties receive an excellent education and will ensure the sustainability and health of CPS. Once these are sustainable, CPS will consider growing additional clusters of schools in locations including Mason, Pierce and/or King Counties. See **Section 14: Attachment 11** and **Section 29** for more detailed information about Catalyst's 5-10 year growth plans. CPS has no plans to expand beyond the state of Washington.

The CPS team brings deep expertise in instructional leadership and school operations to the work of creating a new and innovative network of charter schools. Tatiana Epanchin and Amanda Gardner both

have led high-performing schools serving predominantly low-income students of color. Ms. Epanchin was a teacher, a social worker, and the principal of two schools in Oakland and was the Superintendent for Aspire Public Schools: Bay Area, where she oversaw 11 schools. She served as a Senior Vice President of Regional Operations at Teach for America and co-founded School Leader Lab in Washington, D.C. Ms. Gardner was the founding principal of two schools in Boston and the VP, Schools at Innovate Public School. Through her work at Innovate, Ms. Gardner supported the launch of 16 new and redesigned schools and supported the expansion and replication of several high-performing charter management organizations serving predominantly low-income students and/or students of color.

Each of the schools led by these founders accomplished great achievements for students, including:

- Aspire: Monarch Academy: increase of 150 API points, EPIC: Gold, EPIC: Silver, National Title One Distinguished School
- Aspire: ERES Academy: increase 100 API points in a single year
- Boston Preparatory Charter Public School: 100% of graduates have enrolled and matriculated into 4-year colleges and/or universities and just over 85% of graduates are persisting in college, EPIC: Gold
- UP Academy: Ranked #1 in the state of Massachusetts for student growth in Mathematics and received a commendation from the state for narrowing gaps and high progress

For more information about the founding team's capacity to successfully enact the plans detailed above, reference the CMO business plans in **Section 29**, as well as **Section 26** and **Section 28**.

Section 15: Organization Structure and Partnerships

Catalyst utilizes a shared leadership model with multiple accountability groups to ensure diversity of voice in school management, governance, and operations. Elements, as outlined in **Section 15: Attachment 12**, include:

- **Co-Leadership Structure:** For the first two years of operation the school founders serve as co-leaders, with one leading the elementary school and overseeing the academic model of the school, with the other leading the middle school and overseeing the operational aspects of the school. As the school matures, these leaders move to the Catalyst network office and transition the leadership of the school to the school's established and capable leadership team.
- **Catalyst Board of Directors (BoD):** The BoD is responsible for effectively governing the school. The BoD will represent a highly skilled and diverse group of individuals, who have the skills, mindset, mission alignment and drive to effectively govern the organization. At least 50% of Directors are individuals of color and at least 50% have strong ties to the Bremerton and/or Kitsap County communities.
- **Catalyst Advisory Council:** Catalyst is a learning organization that forms long-lasting relationships with partners positioned to add value to Catalyst's model. The council includes experts in community engagement and parent leadership, innovative school design, school operations and finance, and other fields.
- **Community Advisory Council (CAC):** Families are partners; their leadership is vital to the success of our school. The CAC is a parent-led body that convenes regularly to assess how the school is functioning and has a line to both school leadership and the BoD. The CAC serves as our parent leadership group and takes on issues of interest via a community organizing cycle of action.

Section 15: Attachment 12 includes organizational charts for Year 1 and when we are fully enrolled.

Catalyst will form partnerships with local organizations to provide excellent educational experiences to scholars and families. Partnerships are described below, and sample contracts and pricing details can be found for each organization in **Section 15: Attachment 13**.

- **Olympic Educational Services District (OESD):** OESD provides schools with an array of services so that they can fulfill their missions to serve students and families. We are considering contracting with OESD to provide back-office supports as well as some professional development for our staff.
- **Seneca Family of Agencies:** Seneca is an organization that provides support and expertise around serving diverse students, including those with disabilities and students with mental health, medical, and other needs. We are considering partnering with Seneca to provide special education staffing and for professional development for our staff.
- **Washington State Charter Schools Association (WA Charters):** WA Charters has provided incubation support and will continue to support Catalyst as we launch and grow into a sustainable organization. The cost for a WA Charters membership is \$5/student.
- **True Measure Collaborative (TMC):** Catalyst will join the TMC, so that we can receive technical assistance related to our inclusion model for special education students and English Language Learners. TMC also provides extensive professional development to school staff.

Section 16: Governing Board

1. Governance Philosophy

Catalyst: Bremerton is governed by the CPS board of directors (BoD), which ensures that the school remains faithful to its mission, financially viable, true to the terms of its charter, and delivers outstanding and equitable results for scholars and families.

The school leadership team and the BoD must have a clear understanding of the role of the board and responsibilities of each entity. The following principles serve as the foundation of our governance philosophy:

- Alignment of actions to the Catalyst mission, vision, and values;
- Clear distinction between governance and management; and
- A students-first and equity-driven mindset for making decisions.

To enact these principles, the BoD hold themselves accountable to answering the following questions in their collective work:

- Are we on track to deliver academic excellence?
- Are we operationally and financially sound?
- Do we have the right leaders to drive us towards our path of excellence?

2. Governance Structure and Roles and Responsibilities

The CPS BoD consists of 5 to 9 members who serve 2-year, staggered terms. Officers are elected by board members and will include President, Secretary, and Treasurer. Each officer holds powers and duties as prescribed by the board bylaws. The BoD is made up of a diverse group of individuals that possess expertise in critical areas of charter school governance including finance, legal practices, education, fundraising, community outreach, marketing, and charter school operations. Board members will understand their roles as responsible stewards of public finances.

The collective and individual roles of board members include:

- Holding the organization accountable to its charter and federal, state, and local law;
- Setting organizational goals and developing strategic plans to meet them;
- Reviewing and approving the school's budget;
- Hiring and evaluating the school founders;
- Reviewing, negotiating, and approving major contracts on behalf of the school;
- Providing expertise and professional advice in relevant areas;
- Fundraising for capital and operating expenses as well as soliciting in-kind contributions;
- Promoting the school in the local community; and
- Recruiting and electing new board members, as needed.

The board is a governing body, and day-to-day management responsibilities are delegated by the board to the school founders and leadership team. The BoD maintains active and effective control of the school primarily in their relationship with the school founders who will serve on the board in a non-voting, *ex officio* capacity. Along with an effective reporting structure and attendance at regularly scheduled meetings, the board will set in place evaluative measures that gauge the effectiveness of the school

founders as well as the educational programs of the school. Further, the board will establish a Governance Committee that oversees the continuing recruitment and orientation of qualified directors and will establish an evaluation process to assess its efficacy on an annual basis.

As described in the bylaws, there will be a minimum of two officers of the BoD, President and Secretary. Other Officers may be elected, as determined by the board based on need. Each officer is elected by the full board. We anticipate the following officer positions will be enacted for the founding board:

The Board President:

- Leads the Board;
- Presides at meetings;
- Guides the board in the enforcement of all policies and regulations relating to CPS;
- Performs all other duties normally incumbent upon such an officer;
- Appoints all members, including the chair of each standing committee and all other committees deemed necessary by the Board; and
- May serve as an *ex-officio* member of each committee.

The Secretary:

- Keeps records for the Board;
- Ensures that the actions of the Board are documented;
- Provides, in advance of meetings, written agendas of the sessions of the full Board and the meetings of the standing committees;
- Distributes to Board members appropriate background information on subjects to be discussed; and
- Prepares written minutes for Board members in the specified time, files approved minutes, and maintains the official list of Board members in accordance with procedure.

The Treasurer:

- Oversees financial responsibilities of the Board;
- Serves as financial officer of the organization and as chair of the Finance Committee;
- Manages, with the Finance Committee, the Board's review of and action related to the Board's financial responsibilities;
- Works with the school founders to ensure that appropriate financial reports including the annual budget are made available to the Board on a timely basis for approval; and
- Reviews the annual audit and answers Board members' questions about the audit.

As a public school, it is vital that staff, families, and community have a voice in the ongoing operations and governance of the school. To this end, the Catalyst Community Advisory Council (CAC) is established to ensure representation of these voices via a direct link to the BoD. The relationship of the BoD and CAC is outlined in **Section 15**.

3. Governance Structure and Composition

While the Catalyst BoD delegates management of the school to the school founders, the Board is ultimately responsible for ensuring that the school meets its academic, fiscal, and operational objectives. Standing committees set annual goals and targets to ensure the health of the school.

Once the Board has 7-9 members, each member will be expected to serve on one committee. As indicated by the school's bylaws, the board will have the following standing committees:

- **The Governance Committee** is responsible for matters pertaining to BoD recruitment, nominations, orientation, training, and evaluation in accordance with the bylaws of the organization as well as established policies and practices approved by the BoD.
- **The Finance Committee** creates the upcoming fiscal year budget in collaboration with school founders; presents budget recommendations to the Board; monitors implementation of the approved budget, recommends proposed budget revisions; and recommends to the board appropriate policies for the management of the charter school's assets.
- **The Academic Excellence Committee** Is responsible for working with the school founders to define academic excellence, ensure that all board members know the charter promises that were made to the community and the authorizer, and to devise clear and consistent measures to monitor these goals.

These committees are advisory bodies that report to the full Board. The Board has the discretion to appoint one or more committees that include staff, community members, parents, and/or students to advise the board on matters aligned with their collective expertise. The Board may also create additional ad hoc committees.

Once the school launches, the Board will meet monthly. Board meetings will be held at a CPS school or at a mutually agreed upon location.

Annually, the board and school founders will set governance and management goals, aligned with the goals of this charter, to evaluate the school. Goals are tracked via a web-based platform, along with a comprehensive data dashboard. The board evaluates the school founders annually using a performance evaluation rubric and rigorous process, including 360-degree data from a variety of stakeholders (families, students, staff, etc.). Between annual evaluations the board and school founders will participate in a mid-year review and at least one cycle of 2x2 feedback (See **Section 21**). The process also includes the school founder's self-evaluation.

The board completes an evaluation of their efficacy each year. This is overseen by the Board President or Secretary and will include benchmarking against goals and reviewing performance metrics.

Board meetings are held in accordance with the Open Public Meetings Act (OPMA), and meeting agendas are posted in advance and in languages that families can understand, to the extent possible. To foster community participation in board meetings agendas, minutes, and other files will be available electronically and options for remote participation will be considered, upon request.

CPS retains its own legal counsel and purchases and maintains general liability, officers' and directors' property, Worker's Compensation, and unemployment insurance policies, as necessary.

4. Board Members

The CPS governing board includes board members. Each member's Disclosure form and resume and can be found in **Section 16: Attachment 14**.

TyKera Williams has a background in children, youth, and family-related social service and has decided to become a clinical social worker in healthcare to make a difference in the world. As a Bremerton parent,

she has a vested interest in the success of Catalyst and brings expertise in social work, trauma-informed practices, and youth development.

Julie Kennedy leads the academic and character practice on the Impact Team at Charter School Growth Fund and was a teacher, principal, and a Managing Director with Uncommon Schools in Brooklyn, NY. As Managing Director, Julie helped grow the region to 12 middle schools and three high schools and led the initial transition to Common Core-aligned instruction. She seeks to support Catalyst through her expertise in school governance, organization growth and scale, and school leadership and operations.

Katie Singh serves as the Director of Leadership Development with the Urban Schools Human Capital Academy (USHCA), a national nonprofit committed to improving human capital management in K-12 education. In this role, Katherine leads the design and delivery of several programs to build the skills of K-12 systems leaders. She is inspired by Catalyst's focus on equity and will bring expertise in human capital management.

Amy Kiyota began her career with the Philadelphia Education Fund, where she developed metrics to measure performance and supported fundraising efforts. She later worked in fundraising for the Asian Arts Initiative and as the Executive Director of the Pennsylvania Governor's Advisory Commission on Asian American Affairs. Most recently, Amy was Director of Operations for Leadership Prep Brownsville Middle Academy in Brooklyn where she managed all operational aspects of the charter school including finance, HR, student data, and enrollment. Amy brings expertise around finance, fundraising, and school operations to Catalyst to create a high-quality school option for Bremerton families.

CPS will add three additional Board members by June of 2019. Areas of expertise needed include facilities acquisition, legal expertise, and community connections. School founders are confident, given the number of highly qualified and diverse candidates in our board member pipeline, that this goal will be met.

5. Background Checks

See **Section 16: Attachment 15** for a signed assurance that background check verification has been completed or initiated by the BoD per the required timeline.

6. Selection

An effective board is always recruiting new members. Maintaining relationships with potential board members and inviting qualified candidates to get to know the school will ensure that high-quality candidates can matriculate as board members as needed.

At least quarterly, the school's governance committee will create a communication and outreach strategy to develop relationships with potential candidates.

Prior to this, school founders will lead recruitment efforts to identify potential board members with support from existing board members. The process will be anchored in the mission and values of Catalyst—all potential board members must demonstrate a strong commitment to diversity, equity, and inclusion. Candidates must demonstrate a clear understanding of the responsibilities and roles of board members, including an understanding of the difference between management and governance, and must demonstrate a belief in Catalyst's mission. The selection process will include in-person meetings with

school founders, advisory council participation (as appropriate), reference and background checks, and a comprehensive board orientation.

Committees will be structured as stated above.

7. Board Capacity

Being a board member for a charter school is a significant responsibility; professional development is needed for all members. This includes training in financial oversight, accountability, regulatory compliance, OPMA, effective communication, and strategic planning. Trainings will be provided in person and/or online and may be presented by CPS leadership or external providers.

The board also participates in an annual retreat and in training at least twice per year on CPS's academic model, commitment to equity, and cultural responsiveness. New board members participate in an orientation prior to joining the board and will be mentored by a veteran board member. The following schedule outlines trainings for all board members (unless noted otherwise) for the year prior to school launch:

Board Meeting Date	Topic
November 2019	Catalyst Mission, Vision, and Model Roles and Responsibilities of Board Members Ways to Engage Through Launch
January 2019	WA Charters Orientation for Charter Board Members Deep Dive on Catalyst Instructional Model Board Recruitment Strategies
March 2019	Capacity Interview Training Review Sample Charter Contract
May 2019	Charter School Finance and Facilities OPMA/PRA
July 2019	Authorizer/OSPI Reporting Requirements Ethics Training
September 2019	DEI Intensive
November 2019	CPS Hiring Model/School Founder Evaluation Processes

8. Governing Board

The applicant team includes the formal school governing board.

9. Existing Nonprofits

CPS is a nonprofit organization whose core mission is operating charter schools.

10. Ethics

The board complies with all federal, state, and local laws and recognizes that appropriate ethical standards serve to increase its effectiveness. The board reviews any known potential ethical or financial conflicts of interest and promptly complies with all required statutory obligations and takes appropriate action to resolve actual violations. CPS has adopted a Conflict of Interest Policy and a Code of Ethics Policy (see **Section 16: Attachment 16**).

11. Existing Conflicts

There are currently no existing relationships that pose a conflict of interest.

Section 17: Advisory Boards

Advisory groups ensure equitable voice of Catalyst stakeholders. Our groups are:

Catalyst Design Team (CDT) consists of community members, families, and students interested in co-founding the school and who represent the school's demographics. Members work to develop the strategies for finding, engaging, and keeping interested families involved in Catalyst. This group also provides insight on school programming to ensure that Catalyst meets the needs and experience of its scholars. This entity convenes monthly through the planning year and reports to the school co-founders.

Membership begins with an open call to all interested parties; ongoing participation determinations are made by the co-founders with input from members of the CDT.

Catalyst Community Council (CCC) is comprised of interested members from the CDT and interested faculty members, along with representatives from organizations with whom we partner to deliver on our mission and goals. This team meets bi-monthly with the co-founders in years one and two, and with the school leader in Year 3 and beyond. The CCC is responsible for continued efforts in providing community perspective and priorities to Catalyst leadership. A subcommittee of this council is our DEI Working Group (see **Section 3**).

Membership determinations with regard to partner organization representatives are made by the school founders. Any family member or faculty member may join the Catalyst Community Council; membership opportunities will be advertised thoroughly.

Catalyst Scholar Council (CSC) is composed of scholars interested in making change at the school level in an effort to align the school culture and climate to the Catalyst mission and values. All interested students may participate. The council will be chaired initially by a school founder, and once established, by a teacher-leader. The teacher-leader's primary focus will be to ensure that all CSC work is mission-aligned and inclusive of all scholars.

Section 18: Grievance/Complaint Process

Catalyst ensures that decisions are made in a transparent and equitable manner and establishes fair processes to resolve grievances and complaints.

Several structures ensure proactive and frequent communication across all stakeholders (students, staff, families, and concerned community members).

Catalyst board meetings comply with the Open Public Meetings Act. Members of the public may directly address the Board regarding any school policies, decisions, and practices. Translation and interpretation are provided to ensure equity of voice. The Board participates in a variety of school-related activities to ensure that directors are rooted in our school community. These include frequent school walkthroughs and attending school-related family events.

Structures exist to ensure school staff frequently communicate concerns. Each staff member receives a bi-weekly coaching meeting with their supervisor where concerns can be proactively addressed. Quarterly, staff will participate in 2x2 feedback sessions with their supervisor. School founders will also hold sessions at least quarterly to hear staff concerns that arise and to create working groups of interested staff to design solutions to issues. The school leverages the Tuckman framework to understand team formation dynamics and to build common language around resolving conflicts.^{xlvi}

Families, staff and students also have direct access to relevant staff members to discuss questions and concerns as they arise.

We encourage and practice direct communication whenever conflicts arise between individuals. Examples include:

- Issues around pedagogy or classroom procedures – directed to teacher;
- Issues around curriculum, school policies, etc. – directed to school founders;
- Issues around personal communication – directed to colleague or individual; and
- Issues around work flow or assignments – directed to supervisor.

In events where conflicts cannot be resolved directly, a conflict resolution process is followed:^{xlvi}

- If a stakeholder complaint is regarding a staff member, it will be filed with, and heard by, the school founder(s) or their designee. The process includes:
 1. A written description of the grievance within 10 calendar days (electronic, mail, or by hand).
 2. Review of materials by school founder(s), investigation of facts, interviews with individuals (as needed) and determination of a solution within one week of receiving the written complaint.
 3. Meeting of school founder(s) to review and approve the solution and meet with the stakeholder(s) to review the decision and determine next steps.
- If the complaint is with a school founder or is an appeal of a decision made by a founder, the complaint may be filed to the Chair of the Board who will then confer with the Board. The Board may conduct a fact-finding or authorize a third-party investigator on behalf of the Board. The Chair or investigator will report his or her finding to the Board for review and action, if necessary.

- The Board and/or school founders may take appropriate reformatory steps to ensure effective resolution.
- Complaints against an employee by an external party will follow the same steps. In the event that a school founder (or designee) finds that a complaint against an employee is valid, the school founder (or designee) may take appropriate disciplinary action against the employee. They may also counsel or reprimand employees as to their conduct without initiating formal disciplinary measures.

Translation services are provided as needed throughout the process. All complaints respect confidentiality and non-retaliation.

The Catalyst complaint procedures are designed to be internally resolved within 30 days from the date the complaint was received unless otherwise agreed to by the complainant. The complaint process ends with the Board, as they are responsible for school governance. If a complainant is not satisfied with the Board's response, it may file an appeal to the Washington State Charter School Commission/OSPI. The school is committed to providing prompt, thorough, and accurate information to the Commission in such cases and will abide by any prescribed corrective action deemed necessary.

Specific procedures will be created for specific types of complaints, such as harassment, intimidation, and bullying; sexual harassment; special education; discipline, and civil rights/nondiscrimination to ensure that Catalyst complies with requirements and laws regarding citizen complaints and due process.

The Commission shall not intervene in any internal disputes without the consent of the Catalyst Board and shall refer any complaints or reports regarding such disputes to the Board or school founders for resolution pursuant to the school's policies.

This policy cannot guarantee each problem will be resolved to the employee or community member's satisfaction. However, Catalyst values stakeholder's ability to express concerns and the need for resolution without fear of adverse consequence to employment or connection to the community.

Section 19: District Partnerships

Catalyst is committed to partnering with local school districts to ensure that all students in our region receive an excellent education.

Catalyst plans to work with the Olympic Educational Service District for certain services, potentially including back-office supports, special education supports, and professional development for staff. See **Section 19: Attachment 17** for relevant contracts.

Throughout the application process, Catalyst founders met with the Bremerton School Board President five times and with the Bremerton School District Superintendent three times to introduce the school and learn more about the district's successes and strategic priorities. We have a standing quarterly meeting with senior district staff to review updates on school planning and to address any questions or concerns as they arise. We will also be updating the district staff regarding operations and enrollment to determine areas that we can collaborate as the school launches. We have offered to present to the full school board at a time that is convenient for the board.

We have also met with the Superintendent and senior staff at Central Kitsap School District to review and discuss school plans and offered to make additional presentations with their staff and/or school board, as needed (see **Section 2: Attachment 2**).

We also reached out to the Superintendent of South Kitsap School District but have yet to confirm a meeting time.

Catalyst is committed to ensuring that we are codifying and sharing best practices with local educators in a collaborative manner. Catalyst will:

- Maintain collaborative relationships with the local school districts, including sharing information about school plans and operations, as appropriate;
- Analyze data regarding student enrollment and share trends with local districts as appropriate;
- Share best practices and tools, including resources for student leadership development and social-emotional learning; and
- Share professional development and other program resources.

Section 20: Education Service Providers (ESP) and Other Partnerships

N/A. Catalyst: Bremerton will not contract with any Educational Service Providers.

Section 21: Staffing Plan, Hiring, Management, and Evaluation

A tenet of the Catalyst mission is to develop leadership in all stakeholders, including families, scholars, and staff. Providing world-class professional development is a vital component to developing a high performing school.^{xlix} In fact, there is no stronger factor in predicting student achievement than the quality of teacher in each and every classroom.^l

Catalyst uses Uncommon Schools' Teacher Evaluation Tool as the guide for teacher effectiveness.^{li} For non-instructional roles, EdFuel's Competency Maps guide us in hiring, staffing, management and evaluation.^{lii} During our 2019-20 planning year, the school founders will work with the Board of Directors to fine tune and align the aforementioned rubrics to the mission and vision of Catalyst and to make them our own.

1. Employment Relationship

Employees at Catalyst will be at-will employees and Catalyst will provide thorough documentation of all employee rights in our Employee Handbook. We will post and abide by all employee rights documents required by the state of Washington. Our at-will agreements will outline and clarify all expectations for the employee and will be valid year over year based on the employee meeting or exceeding the expectations for the role. Catalyst will not use employment contracts.

2. Compensation and Benefits

Catalyst has researched the salaries of school staff in the Bremerton School District and has budgeted to offer competitive compensation. First year teachers will be compensated at a rate that is equivalent to the first-year teacher salary of the local district. New teachers will be compensated based on level of competence and professionalism in lieu of number of years of experience in the role. Catalyst has budgeted an average teacher salary of \$65,000 which is competitive with the district with a 3% cost of living adjustment annually. Catalyst school founders will assess each applicant against our effectiveness rubric to determine offers; subsequent compensation increases are competitive with like positions in the region. Each employee will have a professional growth plan with co-constructed goals on which progress will be coached and monitored. All employees who work at least half-time will be eligible for health and other benefits. Because Catalyst employees are public school employees, staff will be part of the Washington State Retirement System.

3. Recruitment and Retention

As suggested by The New Teacher Project (TNT) study of teacher retention "The Irreplaceables," we understand that there are non-compensatory actions to take to address retention.^{liii} In an effort to retain our top performers, we are committed to holding high expectations for all educators, setting retention targets for our high-performing teachers, maintaining excellent working conditions founded on established trust and respect for the profession, ensuring that there is time build into our schedule for collaboration and data analysis, utilizing a robust and fair evaluation system, and conducting an annual satisfaction survey, such as the TNT Insight Survey.

Catalyst aims to hire candidates who are highly qualified per K-8 OSPI certification requirements. We seek a diverse teaching staff who are aligned in our values and goals to cultivate the learning, leadership, and

purpose of our scholars. Through a review of best practice and through our work with the CDT, we have anchored around the following priorities for hiring staff who:

- Have a track record of success in educating scholars of color, scholars with special education needs, and scholars from low-income families;
- Have teacher certification from a program which has a deep focus on DEI as it pertains to schools and to education; and/or
- Represent the groups of scholars whom we serve and/or who demonstrate deep competence in their ability to connect with scholars and families across lines of difference including race, gender, socioeconomic background, and age.

In addition, Catalyst seeks to recruit teachers based upon the following commitment criteria:

- Commitment to our core values of equity, leadership, joy, achievement, courage, and wellness;
- Commitment to serving and developing deep connections to our scholars and our community;
- Commitment to standards-based teaching and grading;
- Commitment to classroom management and culture building that honors each of our core values;
- Commitment to collaboration and solution focus with colleagues, scholars, and their families;
- Commitment to partake in personal growth and exploration in support of the personal growth we require of our students;
- Commitment to cultivate the hope and critical optimism required for our scholars to cultivate theirs so that they can be the catalysts of change they want to be; and
- Commitment to hold self and scholars to high expectations while providing the supports necessary for scholars to achieve personally, socially and academically.

Strategies for recruitment will include recruiting across a variety of organizations and using varied approaches such as:

- Ensuring that the education departments at the state's universities know about our school;
- Developing a schedule of in-person and virtual events and learning opportunities to attract candidates from March 2019 through March 2020;
- Building and maintaining an alternative pathway to certification program for non-credentialed staff;
- Giving families and scholars the opportunity to talk with candidates;
- Placing advertisements on websites and magazines such as Teach for America's Alumni magazine, "One Day"; and
- Tapping our own national networks to ensure that teachers with track records know we are hiring.

To maintain cultural responsiveness in our hiring practices, we commit to including the voices of our scholars, families, and staff as we interview and hire. Scholars, families, and staff will be included on interview panels and in the demonstration lessons. The school founders will deeply consider stakeholder input when making decisions about hiring. We will demonstrate our own cultural competence in our hiring practices by asking candidates what needs they have for the process, allowing time for preparation and thinking leading up to and during the interview day, creating opportunities for collaboration and group problem-solving throughout the interview day, and demonstrating an overt commitment to valuing experience as much or more than academic success.

Timeline:

Catalyst will conduct a hiring process in several rounds with different outcomes for each round:

When	What
September - December 2019	<ul style="list-style-type: none"> • Hold information sessions describing our mission, vision and core values • Enlist local teachers • Collect resumes
January 2020	<ul style="list-style-type: none"> • Resume screens and phone screens
February 2020	Round 1 <ul style="list-style-type: none"> • Interview day • Reference checks • Offers made to Lead Teachers, contingent on passage of OSPI fingerprinting and background check
March 2020	Round 2 <ul style="list-style-type: none"> • Interview day • Reference checks • Offers made to Lead Teachers and Teachers/SGIs, contingent on passage of OSPI fingerprinting and background check
April 2020	Round 3 <ul style="list-style-type: none"> • Interviews, as needed • Reference checks • Offers made to Teachers/SGIs and non-credentialed staff, contingent on passage of OSPI fingerprinting and background check
May 2020	Fully Staffed

4. Hiring and Terminating

In years one and two, the school co-founders will be responsible for hiring Catalyst's employees. In Year 3, the school founders will hire a principal who will then be responsible for hiring Catalyst's employees. The multi-stage interview process includes:

- Submission of resume and detailed letter of interest;
- Submission of a valid Washington State teaching credential or be in official process of obtaining the same;
- Completion of a screening interview via phone;
- Completion of an interview/simulation day including interview panel, demonstration lesson, group problem-solving activity, and reflection; and
- Completion of a background check.

Termination will result when an employee does not meet the expectations of the role for which they are hired. Performance management and opportunity for improvement will be offered when appropriate. This will include identification of areas of concerns, creation of action plans, and a timeline for following up on action plans. Hiring and termination policies will be detailed in Catalyst's Employee Handbook.

All Catalyst employees and contractors will be required to submit a criminal background check and be able to furnish a criminal report summary as mandated by the Revised Code of Washington (RCW) 43.43.830-43.43.838, prior to the first day of employment. The school founders, or the Director of Operations once cleared and hired, will monitor all compliance of this policy. The Board Chair will monitor fingerprinting and background clearance of the school founders. Volunteers who spend time outside the direct supervision of a credentialed teammate will be fingerprinted and receive a background clearance before being allowed to volunteer. The school does not require immigration status information of its volunteers.

All volunteers not meeting the unsupervised access provisions outlined by RCW 43.43.830 will be required to complete a Request for Criminal History Information (WSP-CRD-430). This will be processed through the Washington State Patrol WATCH (Washington Access to Criminal History) system before volunteers are cleared to be present at the school.

5. See Section 21: Attachment 19 for a Completed Staffing Chart for the School.

6. Ratios and Senior Administration and Staff Relationships

The relationship between Catalyst: Bremerton's senior leadership team and the rest of the staff will be collaborative. For the first two years of operation the Catalyst: Bremerton leadership team will consist of the two co-founders, the Director of Finance and Operations, the Community Engagement Manager, and the school's Office Manager. In Year 3, each of these employees except the Office Manager will shift to the CMO office. At this point a new Principal, Assistant Principal/Learning Specialist, and an Operations and Business manager will be hired at the school and this group, along with the Office Manager, will be the school-based leadership team.

As described in **Section 18** there will be common procedures to ensure transparency of decision making, and structures to ensure that all staff can bring concerns to the senior leadership team in effective ways. The following table illustrates key ratios at the school:

Calendar Year	Year of Operation	Number of Students	Number of Teachers	Teacher: Student Ratio	Total Number of Staff	Adult: Student Ratio
2020-2021	1	224	12	19	14	16
2024-2025	5	504	28	18	44	11.5

7. Principal Evaluation

In years one and two, the school founders will be the school leaders and the Board Chair will oversee their performance. The school founders will set annual goals with the Board Chair and with each other during the summer and will base goals on their self-assessment using the rubrics adopted from Uncommon Schools found in **Section 21: Attachment 20**. Student achievement data will be included in the school founders' goal-setting. The Board Chair will ensure that all goal-setting is relevant to the school's strategic plan and will check in monthly to ensure strong execution.

Over the course of the year, the Board Chair and school founders will review student achievement and other relevant data monthly to monitor progress. The school founders will meet weekly to set smaller weekly goals that directly align to the monthly and annual goals and to adjust support(s) as necessary. In addition, they will use Uncommon Schools' Culture rubric (see **Section 21: Attachment 20**) to conduct thorough bi-weekly walkthroughs to progress monitor school and student culture.

At the mid-year point, either December or January, the Board Chair and school founders will have a longer conversation to reflect on progress so far, name and strategize areas for concern, and acknowledge success. At the end of the year or in the summer months, the team will have a summative conversation using the rubric in an effort to set goals for the next year and to evaluate the overall performance of the co-founders.

In Year 3, the school founders will become CEO and CAO of Catalyst Public Schools. The CAO will follow the above process for the principal from this point forward.

8. Teacher Evaluation

The teacher evaluation process directly mirrors that of the school founders/principal. Teachers will set annual goals with the school founders (school principal beginning in Year 3) based on teachers' self-assessment of strengths and weaknesses per the teacher effectiveness rubric (see **Section 21: Attachment 20**). Student achievement data will also be used to determine goals for teacher performance. The school founders/principal and teacher will work together to develop a Professional Growth Plan (PGP) to name goals and track the progress teachers make over the course of the year. During the course of a year, goals met will be replaced with new opportunities for growth.

The school founders (or principal, beginning in Year 3) will meet bi-weekly with each teacher to have coaching conversations regarding instruction using Relay Graduate School of Education's *See It, Name It, Do It* framework (see **Section 21: Attachment 21**). The PGP will be consulted monthly to ensure that weekly meetings are aligned or to make needed adjustments. These meetings hinge upon the school founders spending time each week in the teacher's classroom, and preparing thoughtful feedback with a bite-sized, high leverage, measurable action step aligned to the educator rubric and to the teacher's PGP. After the leader models and names the action step for the teacher, each coaching session will include opportunities for practice. School founders and teachers will meet quarterly to re-visit PGP goals.

At the mid-year point, either December or January, school founders (or principal, beginning in Year 3) will have a longer conversation to reflect on progress so far, name and strategize areas for concern, and acknowledge success. At the end of the year or in the summer months, the principal and teacher will have a summative conversation using the rubric and relevant student data in effort to set goals for the next academic year and to make determinations about retention and hiring.

Section 22: Professional Development

1. Professional Development Overview and Responsible Parties

At Catalyst, we offer world-class professional development (PD) to develop our teachers; we consider it a crucial recruitment and retention mechanism. We define teacher development as observable and measurable progress towards high standards for teaching and learning; we commit to incorporating practice and application of skills in each of our PD strands. Meaningful development and opportunities for practice make up the foundation of our work and are in direct response to the research which states that teachers across our country describe most PD opportunities as unengaging, a poor use of time, poorly planned, or a combination of all three.^{liv}

To keep teachers grounded in the work we do together to serve our scholars, we must build and maintain an environment where everyone can cultivate the hope and optimism necessary to continue to improve and grow. To that end, we ground all of our PD and whole-staff time in practices that attend to diversity, equity, inclusion, and cultural humility. Using the Green Line framework developed by Margaret Wheatley, we make time at each gathering to build relationships of trust, share information, and make meaning together.^{lv} In so doing, we are better able to work together in service of our scholars.

We ensure that opportunities are energizing, supportive, and include multiple rounds of practice. Every Catalyst teacher co-constructs a Professional Growth Plan (PGP) with one of the school founders, or with the principal beginning in Year 3. The PGP tracks team member's growth goals and the PD they receive to meet them.

Catalyst teachers hold expertise in a variety of aspects of teaching and learning and their experience drives our PD programming. Each year, our data-driven PD program includes:

- 20 full days dedicated to PD
- 30 afternoon sessions dedicated to PD
- 30 collaboration opportunities embedded in teachers' weekly schedules

Over the course of a given school year teachers participate in approximately 325 hours, the equivalent of 40 days, of staff development.

The school founders build the PD plan for the first two years. Thereafter, professional development is executed by the school founders, principal, instructional support roles, and teachers with expertise in topic areas.

2. Core Components of Professional Development

There are 10 components of professional development at Catalyst, all of which are delivered internally. Staff will have the opportunity to learn outside of Catalyst when an opportunity for PGP-aligned development is available. The components below align to the Year 1 calendar and sample daily and weekly schedule found in **Section 7**.

Component	Description	Timing
Professional Growth Plans (PGP)	Before instruction begins in the fall, the school leader meets with each teacher to build a PGP, which includes both school-wide goals and personal goals. The PGP guides individual teacher development and is intended to be dynamic as teachers grow and improve. The PGP is comprised of 1) teacher interest and 2) teacher and/or school need. PGPs include instructional goals, personal goals, and equity goals. Once goals are set, teachers work with the school leader to set weekly and monthly action plans to ensure that progress is made in each area.	Formal: <i>Quarterly PGP Re-visit Meeting for Adjustment</i> Informal: <i>portion of weekly coaching</i>
Launch	Called Launch because this time launches the school year, summer professional development takes place during the four weeks before students arrive. New teachers always have four weeks of summer professional development. Returning teachers attend for three weeks. Topics include: <ul style="list-style-type: none"> • Building staff culture • Earning modules on academic program • Classroom set-up • Home visits • Developing PGP Typically, mornings through early afternoon are scheduled with the whole staff or small groups based on topic, with afternoons set aside for individual work and check in meetings.	Each summer: <i>3-4 weeks before school</i>
Look Back / Step Forward	Non-scholar day in which all faculty meet to build community, celebrate successes to date, analyze 8-week data cycles, and build/adjust instructional plans accordingly.	6 times per year: <i>full day</i>
The 2x2	The 2x2 system ensures that school leaders and teachers talk about how things are going in their work. The school leader and the teacher each fill out two things she/he is doing well and two things she/he could do better, as well as two things the other person is doing well and two things that could be better. For the teacher, the focus is on her/his performance overall; for the school leader, the focus is on her work with the teacher.	Quarterly
Staff Sunrise Huddle	For twenty minutes before students arrive, staff come together for an announcement, a celebration of something from the day or time period prior, and a quick hit PD practice session in response to a schoolwide growth area.	Daily until school culture established, then Tuesday and Thursday: <i>7:30-7:50 am</i>

Component	Description	Timing
Classroom Observation and O3	Each teacher is observed at minimum once per week. Using the <i>See It, Name It, Do It</i> framework, the school leader coaches the teacher in a one-on-one (O3) meeting. The feedback from observation includes modeling, naming a high-leverage action step, and practice. The O3 includes adjusting the PGP as teacher practice improves, looking at achievement and other data together, and making time to revisit the classroom to see practice in action.	Weekly at minimum: <i>regularly scheduled with teacher</i>
Data Meetings	Teachers who share content meet together to analyze standards and student work, name a gap in scholars' conceptual understanding, and plan thoughtful re-teaching lessons. This meeting is planned and led by the school leader or content lead.	Bi-Weekly: <i>Built inside teacher work day</i>
Instructional Leadership Team Meetings	The co-founders, teacher leaders, and instructional staff meet to cultivate and build instructional leadership capacity of the team. We sharpen each other's skills by practicing our work with each other.	Weekly: <i>Before or after school</i>
Weekly Team Meetings	Grade level (K-4) and content teams (5-8) meet for at least ninety minutes for two purposes: <ul style="list-style-type: none"> • Collaborative lesson planning • Individual student needs assessment rooted in academic, attendance and/or behavior data along with input from families and other adults at school. 	Weekly: <i>Grade level or content team decides which day after school</i>
Weekly Staff Meetings	The entire staff meets for an hour per week to build community using our DEI work as the anchor, after which we work together in smaller groups for another 90 to 120 minutes to address a schoolwide trend, solve problems, and practice next steps. This time can be used for planning schoolwide efforts, such as upcoming testing or celebrations.	Weekly: <i>Wednesday after scholars' day is over</i>

Non-instructional staff such as school operations staff will participate in the same cycle of data analysis detailed above, using school operations-related data in place of academic data. The Director of Finance and Operations will be responsible for developing data analysis acumen and leading data reviews for non-instructional staff.

3. Schedule

The detailed schedule and description of PD for instructional and non-instructional staff that will take place prior to school opening can be found in **Section 22: Attachment 22**.

4. Time Allotments

See the above table and **Section 22: Attachment 22.**

Section 23: Performance Framework

1. Academic and Organizational Goals

See **Section 23: Attachment 23**, which delineates how Catalyst Public Schools defines our mission-specific academic and organizational goals and targets.

2. Assessments

Catalyst Public Schools promotes a **data-driven culture** to meet each scholar where they are and to ensure we provide the **dynamic supports** that are core to our educational program. The assessments below allow us to track progress towards our Academic Performance Framework goals, including Mission-Specific goals, by tracking student progress towards mastering state grade level standards. Therefore, we use diagnostic, formative, and summative assessments. We also administer all state-required assessments for each grade level we serve. Additionally, in kindergarten we administer the WaKIDS inventory for all scholars and the ELPA21 for all English Language Learners.

Subject/Standards	Diagnostic	Formative	Summative
Writing WA K-12 Learning Standards (WSLS)	Writing snapshots across the genres	Achievement Network (ANet) Interim Assessments or similar On-demand writing snapshots Scholar work	Writing Snapshots Smarter Balanced Assessment (SBA)
Reading WSLS	NWEA MAP Growth STEP reading comprehension and decoding, or similar Reading Mastery	Guided Reading Lexia Accelerated Reader ANet Interim Assessments Reading Mastery Assessments Reading Plus	NWEA MAP Reading Mastery SBA
Phonics	STEP Reading Mastery	Scholar work Running Records	STEP Reading Mastery

Subject/Standards	Diagnostic	Formative	Summative
Math WSLS	NWEA MAP Growth	ST Math data ALEKS data Student work Problem of the week ANet Interim Assessments Exit Tickets	NWEA MAP SBA
Change-Maker Space WSLS	Baseline data gathered via Catalyst Change-Makerspace/Passion Project Rubrics	Catalyst Change-Makerspace/Passion Project Rubrics Math and Science application tasks and exit tickets	Washington Comprehensive Assessment of Science (WCAS) Catalyst Change-Makerspace/Passion Project Rubrics
Leadership	Goal sheets Interest forms Catalyst Baseline data gathered via Change-Makerspace/Passion Project Rubrics and Teaching Tolerance Social Justice Standards	Change-Makerspace/Passion Project Rubrics and Teaching Tolerance Social Justice Standards	Change-Makerspace/Passion Project Rubrics and Teaching Tolerance Social Justice Standards

3. Summative Norm-Referenced Assessments

The table above includes the summative, norm-referenced assessments Catalyst will administer. We will use the Northwest Evaluation Association MAP Growth assessments in reading, language, and math for scholars across the grades, including with scholars in grades not served by the Smarter Balanced Assessments (SBA). We appreciate that NWEA MAP tests measures improvement over time, and thus our goals are centered on year-over-year growth. We understand that our peer schools use the same assessments, which will allow us to benchmark locally as well as nationally.

At Catalyst, we use formative assessments, both formal and informal, to help us measure scholar progress on goals and mastery of standards. Scholar performance on assessments is used to create learning plans tailored to their individual needs. We use results to help us rethink instructional approach, intervention and acceleration, and reteaching opportunities for our scholars. We use summative assessments through

end-of-unit assessments, exhibitions of learning, and passion projects. Students and faculty will have the opportunity to choose artifacts to include in a learning portfolio, which will follow our scholars through their time at the school. Using assessments aligns with our aim to use data to drive all instructional decisions as well as to ensure that we honor our promise to families to help prepare each scholar for the next step towards success in college, career, and life.

4. Monitoring Academic Progress

At Catalyst, we expect that every faculty member monitors scholar progress. We utilize a robust assessment system to regularly measure progress of individual students using a variety of methods from traditional tests, exhibitions of learning, writing snapshots, exit tickets, data from aggressive monitoring during independent work time, and running records. We use the data to develop, execute, and adjust personal learning plans for every scholar. Quarterly interim assessments allow us to monitor student progress towards achieving grade level standards and outcomes reports enable analysis based on grade level, subgroups, and standards mastery. Analysis also includes looking for patterns of inequity in performance of student cohorts and the school as a whole to make sure that no sub-group is overrepresented in low performance bands. Catalyst co-founders will also present academic progress data via an academic dashboard to the board of directors at monthly meetings to monitor the organization's progress towards meeting Academic Performance Framework metrics.

5. Data Collection and Analysis

Data Meetings (DM) will be the primary method in which faculty engages in data collection and analysis. Each week, or every other week, teacher teams will choose an assessment or evidence of learning to collect and analyze. The goal will be to deeply unpack the standard, understand what a scholar has to know and be able to do to reach proficiency, analyze student work to understand both the procedural and conceptual misunderstandings, and work together to plan reteaching opportunities for scholars who need it. To do this, we establish essential DM structures that result in evidence-based action planning including but not limited to: comprehensive meeting schedules; use of established protocols and pre-work expectations for effective analysis meetings; and a thorough system for regular collection of high, medium, and low samples of scholar work. Data will be analyzed, summarized, and reported to the school community at monthly board meetings by the co-founders.

6. Responsible Parties

Catalyst faculty proctor and score assessments as appropriate. Professional development (PD) will include rigorous anchoring exercises to ensure that all assessments are scored according to a specific level of excellence. PD and teacher coaching hours will be dedicated to learning how to use data to drive instructional decision-making. The school co-founders will be responsible for overseeing the school's academic progress monitoring. The co-founders and the Director of Operations will determine the process around collecting and analyzing data in addition to choosing the systems we use to do so. An Assessment Coordinator will support the administration of all state-required exams. Our board of directors has a minimum of two education experts who have experience in this work and will help to inform the team's decision-making in this area.

Additionally, report cards and weekly progress reports will be sent home to share data with families. The school's annual report will be released each year to make data around performance transparent to all stakeholders.

Section 24: Facilities

1. Facilities Overview

We aim to launch Catalyst in or near West Bremerton; our ideal location would be within the 98337 ZIP code.

Catalyst will ultimately serve 504 scholars in grades K-8. There will be 56 students per grade level and students will be split between two classroom cohorts. As such, at our final enrollment levels the school requires 18 classrooms plus additional office space for the school's leadership team and home office team, small group intervention spaces, and a common area for enrichment and Wellness + Purpose activities. Our ideal space would include a common area large enough to hold school-wide community meetings and several multi-purpose specialty classrooms to use for Change-Maker Space and other activities. We anticipate needing between 75 to 85 square feet per student with classrooms being approximately 750 to 1000 square feet. We will need one administrative office in Year 1, growing to two in the 2nd year and beyond.

The following table outlines the space needed as the school grows to full capacity.

	Year 1	Year 2	Year 3	Year 4
# Scholars	224	336	448	504
Grades Served	K, 1, 5, 6	K, 1, 2, 5, 6, 7	K-3, 5-8	K-8
# Staff	23	33	39	44
Approx. Square Feet	16,800	25,200	33,600	37,800
# Admin Offices	1	2	2	2
# Bathrooms	3	3	4	4
# Teacher Planning Rooms	1	2	2	2
# Common Meeting Area	1	1	1	1
# Classrooms	8	12	16	18
# Outdoor Space	1	1	1	1
# Parking Spaces	33	43	49	54
Other Specialty Areas (kitchen space, etc.)	1 Multipurpose Room (meals + elective courses, as needed) 1-3 multipurpose classrooms to use for projects, STEM activities, etc. Kitchen/food prep area 2 conference rooms			

In addition to physical space, dedicated drops for wireless access are needed. To ensure the highest safety of scholars and staff, security features will be considered upon identification. In addition, because outdoor space is important, the chosen facility will include exterior space for recess, physical education, and to play sports (or other Wellness + Purpose activities). At times of inclement weather, students will need a large indoor space. Kitchen space will support the food program and adequate storage space will be used to maintain clutter-free learning environments.

Catalyst understands that annual facility costs for the first year will be roughly \$275,000, based on average rent from existing schools in the region. The budget assumes costs for routine maintenance, janitorial, and technology and wiring upgrades. The planning year budget allows for real estate services needed to secure a facility that is compliant with all state regulations and codes. The facility (including parking spaces and bathrooms) will comply with all codes, acts, and requirements, including Americans with Disabilities, fire, health, and structural safety.

2. Steps Taken

Catalyst anticipates needing both short-term and long-term facilities solutions. Our short-term plan is to secure space in West Bremerton that can house the school for the first two years of operation. Catalyst has engaged a real estate broker, Lisa Phipps with West Sound Group. Ms. Phipps has been leading efforts to identify potential facilities that meet the needs of our educational program, as described in this application. To date, we have identified several viable facilities that meet the requirements of the school in its early years of operation while we identify and invest in a long-term home that will house us at full capacity.

Given the limited capacity of the school to pay for a facility before operations begin, Ms. Phipps will assist the Catalyst team in identifying and negotiating a viable facility by December of 2019, ready for move-in August 2020. In addition to working with Ms. Phipps to locate potential facilities, we are also working with a variety of organizations who support short- and long-term facility development. These organizations, such as Charter School Growth Fund and Washington Charter School Development, are well placed to provide low cost financing and technical support during design development, entitlements, and construction management.

3. MOU

Catalyst does not currently hold an MOU related to a facility.

4. Section 24: Attachment 24 contains letters of support and other documents for this section, including:

- A letter of support from James Heugas, WCSO
- A letter of support from Amanda Sanchez, Raza Development Fund
- An example of a property located in Bremerton that would meet the needs of our school program and educational model
- A statement of assurances for facility in a religious space

Section 25: Start-Up and Ongoing Operations

1. Start-Up Plan

Catalyst has created a plan to ensure that school operations are clearly aligned with the authorizer's pre-opening conditions for the strong launch of a new school. Additionally, Catalyst co-founders have vast experience and have completed extensive research around best practices, both locally and nationally, for starting new charter schools. This plan is based in best practice and will be refined over time as Catalyst secures funding, hires staff, and creates detailed operating procedures. The start-up policies and procedures below reference, with permission, the Ashé Preparatory Academy start-up plan. **Attachment 25** details the Catalyst start-up plan.

2. Transportation

At this time, Catalyst does not have an initial facility identified. Our transportation plan is based on a general assumption that Catalyst students will require transportation services to and from school. Given that Catalyst will open serving students in grades K, 1, 5, and 6 we anticipate that many of our scholars will require transportation to get to school. Catalyst will contract with a private transportation company, such as Harlow's, which services several charter schools in the region. Their responsibility will include transportation to and from school, off-campus field trips, and school-sponsored events. The budget assumptions are in line with local transportation quotes and may be adjusted according to need. Catalyst's Director of Finance and Operations will oversee the contract and relationship with service providers and reporting in OSPI's STARS system. Catalyst will also provide transportation dictated by any student's Individualized Education Plan (IEP) and will abide by all state and federal regulations, including the McKinney-Vento Homeless Assistance Act to provide students with transportation.

3. Safety and Security Plan

Catalyst's safety plan complies with all applicable federal, state, county, and city health and safety laws. A healthy, safe, and positive learning environment is an important component of productive teaching and learning. Catalyst will provide a safe and healthy environment for students, staff, and all who enter our community through the following:

- All Catalyst employees will be trained regarding safety procedures and actions to take in the event of an emergency.
- The annual school calendar will include all mandatory shelter-in-place, lockdown, and evacuation drills.
- The Board will adopt and have in place a comprehensive set of health, safety, and risk management plans and procedures created with guidance from the School Nurse Corps' Washington State School Staff Health Training Guide and the Office of Superintendent of Public Instruction (OSPI) School Safety Center.
- Policies will be developed in consultation with the school's insurance carriers and Bremerton Police, Fire, and Health Department requirements and will be distributed as appropriate (and may be in handbooks).
- The building will be equipped with an alarm system. If necessary, it may be equipped with security cameras and/or a security guard.

- Entry and exit from the school building will be monitored during the day – in particular, upon opening. All doors but the main office door will then be locked.
- Catalyst staff will wear badges, and all guests must register at the main office upon entry to the building and wear a badge identify them as a guest.
- All employees will undergo mandatory trainings on the True Measure Collaborative and SafeSchools learning management systems.
- The school will have a Child Internet Protect Act policy, required for K-12 schools that receive federal funding, and a school technology policy to ensure students are not exposed to offensive, violent, or mature content while using the internet.

Following the Washington State School Directors Association model policies for campus and student safety and security, Catalyst will incorporate the following:

- **Immunizations and Mandatory Health Testing:** Catalyst will adhere to laws related to legally required immunizations and a health screening for entering students and staff pursuant to RCW 28A.210. Catalyst will adopt the procedures required by Bremerton Public Schools for medical records and medication, except for the over-the counter medications ibuprofen and acetaminophen, which school staff will dispense, as needed, with parent permission.
- **Cardiopulmonary Resuscitation (CPR), Automated External Defibrillator (AED) & First Aid Training:** Select Catalyst employees will hold current CPR and First Aid and AED certification.
- **Blood-Borne Pathogens:** Catalyst shall meet state and federal standards for addressing blood borne pathogens and other potentially infectious material in the workplace. Catalyst will establish a written infectious control plan, like the plan for Bremerton School District, designed to protect employees and students from possible infection due to contact with blood-borne viruses, including human immunodeficiency virus (HIV) and hepatitis B virus. Whenever exposed to blood or other bodily fluids through injury or accident, staff and students will follow the latest medical protocol for disinfecting procedures.
- **Procedures of Background Checks:** Board members, employees, and contractors at Catalyst will be required to submit to a criminal background check and provide a criminal record summary as required by RCW 43.43.830 to the school co-founders. New employees must submit fingerprints and processing fees to OSPI for processing through the Washington State Patrol and FBI. The Board Chair will monitor the fingerprinting and background clearance of the co-founders. All volunteers will be fingerprinted and receive a background clearance prior to working with students. All volunteers not meeting the unsupervised access provisions outlined by RCW 43.43.830 will complete a Request for Criminal History Information (WSP-CRD-430). This form will be processed through the Washington State Patrol Washington Access to Criminal History (WATCH) system prior to volunteers being cleared to work at Catalyst.
- **Role of Staff as Mandatory Child Abuse Reporters:** All Catalyst staff are mandated to report child abuse and will follow all applicable reporting laws. They will be notified of this requirement during summer staff orientation and in the Catalyst Employee Handbook.
- **Weapon-Free, Drug-Free, and Smoke-Free Environment:** Catalyst is a weapon, drug, alcohol, and smoke-free environment.
- **Comprehensive Harassment Policies and Procedures:** Catalyst is committed to providing a school that is free from sexual harassment, as well as any harassment based on such factors as race, religion, creed, color, national origin, ancestry, age, medical condition, marital status, sexual orientation, or disability. Catalyst will adopt a comprehensive policy to prevent and

immediately remediate any concerns about discrimination or harassment at the school including all interactions between and among students, employees, and volunteers.

- **Emergency Preparedness:** Catalyst will adhere to an emergency preparedness and Rapid Responder crisis plan drafted specifically to the needs of the school site in conjunction with local law enforcement and the fire marshal. Emergency response will be part of Catalyst's emergency preparedness and Catalyst will have a system for internally locking down the building, based on the facility. This plan includes the following responses: fire, flood, earthquake, terrorist threats, and hostage situations. If Catalyst assumes a facility that was used as a school, any existing emergency preparedness plan shall be reviewed and updated. Staff will be trained on this site safety plan. Catalyst will act in accordance with RCW 28A.320.125(6) by practicing lock-down drills once per quarter and shelter-in-place drills and off-site evacuation drills once per year.
- **Facility Safety:** Catalyst will comply with WAC 246-366 regarding environmental health and safety standards for school facilities. The school agrees to maintain visitor policies, and install and test sprinkler systems, fire extinguishers, and fire alarms annually to ensure that they are maintained in an operable condition always.

4. Food and Other Operational Services

Catalyst is committed to providing healthy breakfast and lunch at an affordable price for all its students, in adherence to all state and federal nutritional guidelines. Catalyst is considering partnering with Fresh n' Local Foods to deliver food service. Fresh n' Local serves freshly prepared meals every week to K-12 schools throughout Washington, including several charter schools. Local food vendors that are familiar with participating in the National School Lunch and Breakfast reimbursement program will be considered as well. Catalyst's Director of Finance and Operations will work in collaboration with the Community Engagement Manager to collect all necessary documentation from families who are eligible for free or reduced-price meals, and track meals via a point-of-sale system, like MealTime.

5. Insurance Coverage

See **Section 25: Attachment 26** for the types of insurance coverage Catalyst will secure.

Section 26: Operations Capacity

Catalyst is led by a team of seasoned leaders who collectively hold expertise in each of the core operational areas required to launch a school of excellence.

The school's co-founders, Amanda Gardner and Tatiana Epanchin, are both seasoned school leaders. In their collective experience, they have: supported their staff to deliver results for students; managed and supported the growth of networks of schools during their careers; and supported these organizations to find operational excellence in the areas of fundraising, facilities, performance management, and school/network finance.

In addition to the robust capacity that Ms. Gardner and Ms. Epanchin bring to the school, the Catalyst board and partner organizations provide needed expertise in additional areas, as follows:

- **Staffing:** Ms. Gardner and Ms. Epanchin, collectively, have hired and managed hundreds of teachers and school staff during their tenures as educators. In addition, as the regional superintendent for Aspire Public Schools in the Bay Area, Ms. Epanchin oversaw staffing for 11 schools. Julie Kennedy, a Catalyst board member, also has deep expertise related to school staffing; as a managing director for Uncommon Schools, Ms. Kennedy oversaw 12 middle schools, three high schools, 350 staff, and over 3,800 students.
- **Professional Development:** Ms. Gardner, Ms. Epanchin, and Ms. Kennedy all have deep experience planning and coordinating professional development for staff at all levels. Ms. Gardner and Ms. Epanchin both lead professional development efforts at their respective schools and, since then, have founded and led fellowship programs for both district and charter school principals. Through these programs they have supported well over a hundred school principals, assistant principals, and teacher leaders. Ms. Kennedy also has deep capacity around professional development via her Managing Director role at Uncommon and also via her current role as the Academic and Character Practice Lead at Charter School Growth Fund, where she supports school leaders nationally to explore and find solutions to challenges of practice.
- **Performance Management:** As mentioned, Ms. Gardner, Ms. Epanchin, and Ms. Kennedy all have strong experience in running high-performing schools, including the performance management of staff across all levels of the organizational structure, from support staff to senior leadership teams. Additionally, Katherine Singh, Catalyst Board Member, has deep expertise related to performance management and professional development. Ms. Singh is currently the Director of Leadership for the Urban Schools Human Capital Academy; in this role, she facilitates a fellowship program for senior level human resources officers from school district and charter schools from across the country. Additionally, in a previous role as the Senior Director of the Office of School Leader Effectiveness with the New York City Department of Education, Ms. Singh led efforts to pilot a new approach to the principal performance review process, which included 30 principals and seven superintendents.
- **General Operations:** The aforementioned members of the applicant team have deep expertise in supporting the operational efforts of schools and nonprofits. In her role as Managing Director of Schools and Operations at Innovate Public Schools, Amanda Gardner supported the development of operational routines and procedures for the nonprofit as it grew into new geographies. Specific responsibilities included hiring/managing a Director of Finance and overseeing the development of operating procedures for staff. Catalyst board member Amy Kiyota also has deep experience with general operations for schools and nonprofits. As the Manager of Finance and Operations at Impact Public Schools, Ms. Kiyota coordinates day-to-day operations and logistics at the school,

including managing transportation, scheduling, vendors and more. Ms. Kiyota held a similar role at Brownsville Middle School, an Uncommon School in New York, where she was the Director of Operations.

- **Facilities Management:** Amanda Gardner and Amy Kiyota both bring experience with facilities acquisition and management. In her role at Innovate Public Schools, Ms. Gardner supports charter school founders as they acquire facilities for their schools. In her role with Uncommon Schools, Ms. Kiyota supported the expansion of the campus and managed the school's facility plan. Catalyst also partners with Washington Charter School Development, a nonprofit real estate development organization that has extensive experience in facilities acquisition and management, having built over 45 charter school campuses. They have secured more than \$200M in financing and have established relationships with lenders, including Community Development Financial Institutions (CDFIs) and banks. They partner with local architects and contractors (in managing build-out and renovations) and work with public agencies to streamline approvals. Lastly, Catalyst partners with Bremerton-based Sound West Group via our relationship with broker Lisa Phipps. Sound West Group is a partner to secure short- and long-term facilities solutions.
- **State and Federal Compliance:** Catalyst school founders as well as several board members have strong experience related to state and federal compliance, including writing and managing federal Title programs. Catalyst will also hire a Director of Finance and Operations who brings expertise in these areas.

CATEGORY 5: FINANCIAL PLAN AND CAPACITY

Section 27: Financial Plan

1. Financial Systems and Policies

Catalyst develops high-quality policies and procedures for financial planning, accounting, purchasing, and payroll, including strong internal controls and capacity for complying with all financial reporting requirements, the school's charter contract, and the School District Accounting Manual (SDAM). We adapt the fiscal policies and procedures included in **Section 27: Attachment 27** to create strong internal controls.

Financial Planning

Policies and procedures for financial planning are finalized by the Board and led by the finance committee, in collaboration with the school co-founder/CEO (CEO), the Director of Finance and Operations (DoF) and our back-office service provider.

The DoF regularly meets with the CEO to monitor the budget, review budget vs. actuals and variances, monitor cash flow, and review all financial data. This process ensures that the CEO will have ownership over the school-site budget and ensures effective financial management of the budget by multiple individuals.

After budgets are created by the DoF, they are reviewed by the staff, the leadership team at Catalyst, and the finance committee. Budgets are reviewed by Catalyst families and stakeholders during a yearly planning meeting and are ultimately approved by the Board. Budgets are revised once a year in the fall. In addition to a one-year budget detail, a five-year financial plan is provided. Financial responsibilities in the organization are outlined below.

Policies and procedures regarding accounting, purchasing, and payroll are aligned to and comply with all applicable local, state, and federal regulations regarding the use of public funds to establish and maintain strong internal controls, including the school's charter contract and the SDAM. In addition, Catalyst looks to the Washington State School Directors Association (WSSDA) for examples of model policies and procedure. Financial policies and procedures and controls are reviewed annually, or more frequently if needed, to ensure that updates to the SDAM and other regulations are incorporated in Catalyst's policies and procedures and adopted by the Board.

Accounting

Catalyst follows all accounting procedures recognized and mandated by Generally Accepted Accounting Principles (GAAP), Financial Accounting Standards Board (FASB), and the State of Washington. Accrual-based accounting is used with appropriate general ledger codes, along with account segments capable of reporting on subcategories such as revenue source, department, and other areas to be determined. Catalyst works with its back-office provider to set up streamlined accounting systems that work in concert with state reporting platforms.

Purchasing

Purchases of goods and services are consistent with the Board-approved budget and do not require a Board-approved/executed contract, with the exception of expenditures that exceed the budget by a material amount. Other proposed expenditures are approved by the person who reviewed the proposed expenditure to determine whether it is consistent with the Board-adopted budget.

The Board Chair and the CEO approve purchase orders and invoices of \$10,000 or more. Check request and purchase order forms are signed by the person reviewing the expense (if applicable).

In general, invoices are reviewed and signed according to the procedures outlined below to ensure the items were properly requisitioned and maintained to document check processing. Open invoices are paid in a timely manner unless delayed payment is arranged through the vendor, in which case the school will meet payment schedules as outlined. Expenditures between \$5,000 - \$10,000 are authorized by the Board Chair and CEO. Expenditures up to \$5,000 are authorized by DoF, Board Chair, or CEO. Electronic payment methods (i.e., wire, ACH, transfer between bank accounts) are reviewed by the finance committee and must follow ordinary procurement procedures.

All professional consulting services are provided under a contract. Contracts for other goods and services exceeding \$10,000 on an annual basis are presented to the Board for approval during the annual budget cycle or prior to signing. Duration of contracts is at the discretion of the Board. In general, contracts exceeding \$10,000 are reviewed after a bidding process of sufficient duration to ensure competition. Bid tabulations are presented to the Board, along with a recommendation for action. The Board reserves the right to select whichever vendor it deems most prepared to provide the required goods or services, without regard to the low bidder being the automatic selection.

School credit cards are allowed for school purchases and travel. Authorized purchasing cardholders are the CEO and DoF. All credit card charges must follow ordinary procurement procedures.

Employees are reimbursed for all necessary and reasonable costs associated with traveling for school business. All applicable receipts are attached to a completed expense report. Reasonable costs of meals while traveling are reimbursable using standard U.S. government per diem rates for the city in which an employee is staying for one to three meals per day, depending on the circumstances of a particular trip. Alcohol will never be reimbursed. Employees are reimbursed for the cost of single-room accommodations typically occupied by business travelers. When lodging expenses exceed standard U.S. government per diem rates for the city in which an employee is staying, employees must receive advance approval for the cost of lodging. In certain circumstances, employees may be accompanied on business travel by a spouse/domestic partner. At no time will the school reimburse an employee for costs incurred for the travel expenses of the spouse/domestic partner. No board member or employee may authorize a reimbursement request made payable to themselves. Reimbursements payable to the school co-founders are approved by either the Board Chair or the Treasurer.

All employees are reimbursed at the standard mileage rate per mile as determined by the IRS for use of their own vehicle for business-related travel pre-approved by their supervisor. In addition, parking fees and tolls are reimbursable if supported by receipts. All employees requesting such mileage reimbursement are required to furnish an expense report supported by receipts (if applicable), containing the destination of each trip, its purpose, and the miles driven, as well as parking fees and tolls, within one month after the travel date. Other transportation expenses such as taxis, rental cars, buses, and airplane tickets will be reimbursed for the actual costs incurred. Fines and parking tickets are not reimbursable.

Use of school funds for personal use is prohibited. Violation of this policy will result in discipline up to and including dismissal or removal, including from the Board.

Payroll

Salaries and benefits align with the approved annual personnel budget. The hiring process is led by the school co-founders. Staff complete an application for employment, paperwork for payroll, and are fingerprinted consistent with state law. Fingerprinting and background checks are completed prior to the staff start date. Employees accrue vacation and sick leave based on a board-approved personnel policy; this policy will be available in Catalyst's employee handbook.

Catalyst will likely use Olympic Educational Services District (OESD) as a back-office support provider. OESD will develop procedures to ensure accurate and timely preparation of timesheets for hourly employees.

Catalyst is an at-will employer and there will be no employee contracts. Catalyst leadership will develop a written Employee Handbook that will include expectations for employees and Catalyst as an employer regarding fulfilling the school's vision, mission, and principles.

Internal Controls

Catalyst's finance team, which includes the CEO, the finance committee, and the DoF, ensures timely and accurate reporting; adequate safeguarding and stewardship of all assets; compliance with all legal requirements; and ethical, open, and transparent presentations of information. The finance team meets monthly to review compliance with established policies and procedures and to recommend improvements. This team reviews all invoices and payments over \$2,000. Any inconsistencies in the application of internal controls, not matter how slight, will be immediately reported to the board.

Catalyst, as authorized by the Board, establishes a commercial bank account for the purposes of school operations with approval of the Board. Funds are deposited in non-speculative accounts including federally insured savings and/or checking accounts and/or invested in non-speculative federally backed instruments and/or standard money market accounts. Catalyst has a general checking account for school needs. The Board Chair, Board Treasurer, and CEO are authorized signatories on this account. The back-office provider will reconcile all bank accounts monthly. Reconciliations are then be reviewed and approved by the DoF as a member of the team who does not have the ability to approve expenses or disburse funds from the account. The monthly bank reconciliations are reviewed by the Board or a Board representative who is not an authorized approver of expenses or signer on the account. The Board Chair, Board Treasurer, and school founder/CEO are designated signatories on the Catalyst's savings account.

A petty cash fund of \$200 is established and managed by the Catalyst co-founder/CEO according to normal petty cash procedures (e.g., provide receipts, ensure valid purpose). Cash balances and reserves are invested in federally insured, fiscally conservative, interest-bearing accounts.

The school deposits all funds received as soon as practical upon receipt. The office manager opens all mail daily, sorts and endorses all checks to the appropriate school account, and prepares appropriate deposits as soon as practical, ideally the same day and in no more than three business days. When cash is received, it is counted by at least two employees, who both verify the amount received and sign a cash deposit form indicating the performance of their duties.

2. Roles and Responsibilities

Our financial planning team includes:

- Board finance committee
- School co-founder/CEO
- Director of Finance and Operations
- Back-office service provider (OESD)

The DoF works regularly with the school co-founders to monitor the budget, provide analysis of budget versus actuals and variances, monitor cash, and provide real-time access to all financial data. This training ensures that the school co-founders have significant ownership over the school-site budget. After budgets are created by the DoF and principal, they are reviewed with the staff, the school leadership team, and the Board finance committee. Each budget is then taken to a public Board meeting for approval. Budgets are revised once a year in the spring for the next fiscal year. In addition to presenting the one-year budget in detail, the DoF presents a multi-year model for context and planning purposes, beginning with the five-year Financial Plan Workbook included as **Section 27: Attachment 27**.

Activity	Co-Founder/CAO	DoF	Co-Founder/CEO	Catalyst Board
Budget	Provides input	Leads development	Makes proposal	Finance committee Reviews; Board approves
Audit		Leads process	Provides input	Audit Committee Reviews; Board Approves
AR/AP/Banking	Signs checks below \$2500	Leads process; approves all invoices	Signs checks below \$2500	Signs all checks above \$2500, Reviews balance sheet
Budget Monitoring	Variances and forecasts reviewed 2 x monthly with Director of Finance	Leads process	Variances and forecasts reviewed monthly	Finance committee reviews
Payroll		Leads process	Reviews and approves all compensation	Approval of CEO compensation

Activity	Co-Founder/CAO	DoF	Co-Founder/CEO	Catalyst Board
Cash Management		Leads process		If any loan is needed, Board approval is required
Authorizer Reporting	Provides input	Leads process	Approval	Approval when required

Note that roles and responsibilities are updated over time and leverage the CSBM Checklist (see **Section 27: Attachment 27**) as a guide.

3. Annual Audit

Catalyst adheres to the accounting, auditing, and reporting procedures and requirements that apply to public schools operating in Washington State, and engages in an annual audit of financial and administrative operations by an independent auditing firm. This audit is conducted in accordance with the applicable GAAP and the Governmental Accounting Standards Board standards, if necessary.

The Board contracts with a qualified outside audit firm, chosen in compliance with state laws and regulations, to perform an audit each year on the close of the prior year's books and in advance of the statutory audit deadline. In keeping with recommended best practices, the Board contracts with a new audit firm after three consecutive years of working with the same audit firm. The audit includes: (1) accuracy of the school's financial statements including balance sheets, income statements, and cash flow statements; (2) attendance accounting and revenue claims practices; and (3) internal controls practices. If Catalyst receives more than \$500,000 from federal sources, the audit is prepared in accordance with any relevant Office of Management and Budget audit circulars.

After the audit, the Board reviews the audit findings and requests, and adopts and monitors any corrective action, if required. The selected audit firm prepares the Internal Revenue Service (IRS) Form 990 (Return of Organization Exempt from Income Tax) and sends a copy to the school staff responsible for the audit. The Director of Finance will review and send a copy to the Board for its review and approval before filing. Once approved by the Board, the Director of Finance notifies the audit firm to prepare the final return for filing.

Catalyst will also be subject to performance and financial audits by the State Auditor's Office. These audits may not be annual, but all financial periods will be covered when the audits occur. State audits may include any combination of financial reporting, Federal A-133 testing, and risk-based procedures.

4. Transparency

The Board adopts a fiscally conservative budget well in advance of any required deadlines by the authorizing entity. During the year, the Board may amend the budget as expenses and revenue projections

change. Prior to Catalyst's first year of operation, Catalyst and the Board will start the budget adoption process in January 2020 by creating a list of budget priorities and/or reviewing the current budget priorities, balancing input from key stakeholders while focusing on the core mission of the school. This proposed budget will be provided to the Board of Directors at the end of March 2020 and will be based on conservative assumptions for State and Federal Education Revenue. The Board will discuss the budget at an open Board meeting in April 2020. The meeting will be publicized to families and various community stakeholders well in advance of the public meeting so that interested parties can attend the budget-related Board meeting(s). School leadership will submit a final budget for approval by the Board by May 2020.

As the school is subject to Washington Open Meetings Law, all Board discussion around the budget and its ultimate adoption will be completed during public Board meetings. Annual audits and any significant findings will likewise be presented during public Board meetings. In keeping with IRS guidelines, copies of Form 990 will be made publicly available. In addition, in keeping with recommended best practices, Catalyst will publish on its website the upcoming fiscal year's board meeting schedule, board agendas (as they become available), board meeting minutes, and a process for making a public documents request.

Financial documents for Catalyst are made available to the Commission, public upon request, and meet all of the financial requirements of the contract. Additionally, as regular practice, the Board will:

- Review/approve the budget in a public meeting
- Review quarterly financial reports including budget vs actuals and balance in a public meeting
- Review/approve the audit in a public meeting
- Review/approve Form 990 in a public meeting

5. Financial Plan Workbook

Section 27: Attachment 27 includes a complete financial workbook using the per-pupil revenue guidance provided by the Commission.

6. Budget Narrative

A detailed line item budget narrative is in **Section 27: Attachment 28**, which includes a description of the assumptions and revenue estimates, the basis and calculations for revenue projections, staffing levels, expenditures, and the degree to which the school budget will rely on variable income. The narrative addresses anticipated funding sources, a contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated, and a Year 1 cash flow contingency if revenue projections are not met in advance of opening.

Section 27: Attachment 29 provides evidence of philanthropic support that is anticipated and that received to date.

7. Long-Term Fundraising Plan

Catalyst's plan is in **Section 27: Attachment 30**.

Section 28: Financial Management Capacity

The Catalyst applicant team has the finance experience needed to support the school's needs and operations.

Financial Management and Fundraising

School co-founder Amanda Gardner has managed multi-million-dollar budgets as a school leader and has supported the development of budgets of similar size at Innovate Public Schools. Additionally, Ms. Gardner led fundraising efforts to support Innovate's Charter School Entrepreneur-in-Residence program, a multi-million-dollar program to support diverse leaders to launch new charter management organizations in the Bay Area. Similarly, co-founder Tatiana Epanchin has managed multi-million-dollar school budgets and supported the financial work required for a region of 11 schools in the Bay Area of California. She has also been a founding senior leader of the new nonprofit School Leader Lab in Washington D.C. and has supported the fundraising and financial management needed to ensure that School Leader Lab thrives.

In addition to the school co-founders, several Catalyst board members have significant financial management experience. Amy Kiyota is currently the Director of Finance and Operations at Impact Public Schools and oversees the development of internal controls and fiscal policies and procedures, in addition to supporting the Chief Operations/Financial Officer in setting and revising operating budgets for the school and charter management organization. Julie Kennedy also has similar experience managing large school budgets in her work at Uncommon Schools, both as a principal and as a Managing Director.

Accounting and Internal Controls

Catalyst will hire a Director of Finance and Operations in January of 2020. This position will be posted broadly to attract diverse candidates with the experience needed to fulfill the role. Catalyst also plans to partner with Olympic Educational Services District (OESD) or another back-office service provider for direct support to the Board and the school co-founders around financial management. This back-office provider will support the school in developing: strong internal controls; fiscal policies and procedures; budget planning and management; and financial management in insurance, banking, payroll, and bookkeeping. OESD works with many school districts in this capacity on the Olympic Peninsula. Catalyst will also draft internal procedures via our fiscal policies and procedures handbook, drawing from the Washington State School Directors' Association model policies, the Commission's Financial Performance Framework, and the *Accounting Manual for Public School Districts in the State of Washington*.

Section 28: Attachment 31 and **Section 28: Attachment 32** are not applicable, as Catalyst is a newly created entity without an existing financial record.

CATEGORY 6: EXISTING OPERATORS

Section 29: Existing Operators or Proposed Charter Management Organization Development

1. Catalyst Public Schools Growth and Business Plan

Mission, Vision, and Partnerships

Catalyst Public Schools (CPS) is an independent 501(c)3 non-profit charter management organization that aims to launch and sustain schools of excellence across Kitsap and Mason counties. The first phase of the CPS growth plan includes launching two schools in Kitsap County. The first school is Catalyst: Bremerton, a K-8 school hoping to launch in the 2020 school year. The second school, tentatively opening in school year 2023, will be a high school offering grades 9-12 which will serve the same community as Catalyst: Bremerton. Growth plans for additional schools beyond these will be developed once the first two schools are excelling, both academically and financially.

Mission

Catalyst: Bremerton supports our diverse scholars to live full lives and to succeed in college, career, and life. Scholars will find their purpose and passion so that they can cultivate the critical hope, optimism, and leadership essential to be catalysts in their community and world.

Vision

Catalyst: Bremerton's graduates build a strong understanding of themselves, envision the world in which they want to live, and develop the agency to access the future of their dreams.

Values



CPS believes in partnering with community to co-create schools that are designed to meet the unique needs and context of each community served. Catalyst partners with families, community-based organizations, and others to ensure that scholars are supported holistically. Partners include:

- **Catalyst Design Team:** A group of scholars, families, and community members who meet regularly to envision and design the Catalyst school model. Design teams are created in each community

where Catalyst will launch and convene monthly for approximately 18 months prior to school launch.

- **Olympic Educational Services District (OESD):** OESD provides technical support, back-office financial support, and professional development.
- **Seneca Family of Agencies (Seneca):** Seneca provides professional development around topics such as equity leadership, social emotional learning, and serving students with diverse needs. Seneca may also provide staffing support for key special education and other support roles at schools.
- **Washington State Charter Schools Association (WA Charters):** WA Charters provides support via their School Leadership Design Fellows and Strong Start programs. Support includes sessions around school finance and budgeting, application writing, equity leadership, and excellent school site visits.
- **True Measure Collaborative:** Provides special education support, services, and training.
- **Washington Charter School Development:** Supports the acquisition, development, and leasing of school facilities.
- **Raza Development Fund:** Supports financing options for school facilities as well as strategic thought partnership around facilities acquisition.

Growth Plan and Greenlighting Process

CPS is committed to serving Washington students; our growth plans include focusing on Kitsap County for our first phase of growth. We know that charter school growth is fueled by community demand; therefore, we aim to start schools in partnership with communities where there is a demonstrable need for new, innovative, high-quality public school options.

Eventually, we anticipate opening a network of schools across Kitsap, Mason, and/or Pierce counties. For now, we are beginning due diligence within target communities to assess the need for new school options and community and family demand. We believe that these counties are ideal potential locations for our school model given the population increase that is occurring in the region, overpopulation of schools in certain communities, educational gaps that persist across lines of race and class, and a lack of innovative public school options.

Anticipated Student Population

Catalyst creates schools equipped to meet the needs of all scholars, regardless of their previous academic background, and that are as diverse as the communities they serve, especially along lines of race and socioeconomic status. The following charts outline our anticipated demographics for Catalyst: Bremerton, as well as projected demographics for additional schools in neighboring communities.

Student Population	%FRL	%Special Education	%English Learners	%Students of Color
Catalyst: Bremerton (similar to Bremerton School District)	62	18	7	50
South Kitsap	35	15	2	30

Student Population	%FRL	%Special Education	%English Learners	%Students of Color
North Mason	54	15	12	31
Tacoma/Pierce County	56	15	11	60

Rationale for Growth Plan

CPS believes that public school choice is a vital ingredient to ensuring equitable outcomes for all scholars, especially those who have been traditionally marginalized from receiving an excellent education. Charter schools allow opportunities for innovation and equity-driven reforms to take root. This not only improves outcomes for the scholars who attend the charter school, but it can also have an impact on the performance of scholars in neighboring schools. CPS’s commitment to sharing best practices and collaborating with local school districts will foster this type of collective, positive impact.

Financial Viability

The proposed growth plan will ensure that CPS is a financially viable organization that can provide the essential educational and operational services that its schools need to thrive. The Financial Plan Workbook in **Section 27: Attachment 27** details the growth of the first and second CPS schools and the development of the charter management organization.

Market Analysis

CPS will locate in the Kitsap Peninsula of Washington state for several reasons. First, this region of the state is home to Catalyst co-founders, who are strongly compelled to work within their local communities to launch excellent schools. Second, there is demonstrated need and strong parent demand for new school options in this region. The charter school ballot initiative of 2012 was supported by Kitsap and Mason county voters. In Kitsap County, the initiative passed with a percentage of “yes” votes that exceeded the state average. In Mason County, the initiative passed with the widest “yes” margin in the entire state of Washington. In addition to this data, countless 1:1 conversations, community forums, and other engagement events have yielded significant proof that families are hungry for new public-school options, especially those that put students at the center of their learning and foster leadership development and academic success.

Organizational Capacity

Leadership Team and Capacity to Provide Educational and Operational Management

Details regarding the track record of success and the instructional and operational capacity of the school co-founders can be found in **Section 13**, **Section 26**, and **Section 28**.

Members of the CPS Board have similar track records of success and bring deep expertise to the organization. Information about each board member is below:

TyKera Williams has a background in children, youth, and family-related social service and has decided to become a clinical social worker in healthcare to make a difference in the world. As a Bremerton parent, she has a vested interest in the success of Catalyst and brings expertise in social work, trauma-informed practices, and youth development.

Julie Kennedy leads the academic and character practice on the Impact Team at Charter School Growth Fund and was a teacher, principal, and a Managing Director with Uncommon Schools in Brooklyn, NY. As Managing Director, Julie helped grow the region to 12 middle schools and three high schools and led the initial transition to Common Core-aligned instruction. She seeks to support Catalyst through her expertise in school governance, organization growth and scale, and school leadership and operations.

Katie Singh serves as the Director of Leadership Development with the Urban Schools Human Capital Academy (USHCA), a national nonprofit committed to improving human capital management in K-12 education. In this role, Katherine leads the design and delivery of several programs to build the skills of K-12 systems leaders. She is inspired by Catalyst's focus on equity and will bring expertise in human capital management.

Amy Kiyota began her career with the Philadelphia Education Fund, where she developed metrics to measure performance and supported fundraising efforts. She later worked in fundraising for the Asian Arts Initiative and as the Executive Director of the Pennsylvania Governor's Advisory Commission on Asian American Affairs. Most recently, Amy was Director of Operations for Leadership Prep Brownsville Middle Academy in Brooklyn where she managed all operational aspects of the charter school including finance, HR, student data, and enrollment. Amy brings expertise around finance, fundraising, and school operations to Catalyst to create a high-quality school option for Bremerton families.

CPS will add three additional Board members by May of 2019. Areas of expertise needed include: facilities acquisition, legal expertise, and community connections. The school founders are confident, given the number of highly qualified and diverse candidates in our board member pipeline, that this goal will be met.

Governance Structure at CPS and Schools

CPS will be governed by a Board of Directors that will hold the management office and each school to the terms of the charter for each school so that the mission is fulfilled. In addition, the Board of Directors serves to provide external accountability, internal oversight, and leadership of the organization. The CPS board will have strong local control over Catalyst: Bremerton and all other CPS schools. The members will be mission-driven, active, locally connected, and adept in the skills needed to govern high-performing schools for the scholars of Kitsap County and Washington State.

The Board will select the co-founders and CEO of Catalyst Public Schools and is responsible for overseeing, developing, and evaluating these senior staff members. In the first two years of operation, the Board will evaluate both co-founders. In Year 3, when the CMO office is established, the Board will appoint one CEO for CPS; this person will report directly to the board. The other co-founder will assume the role of Chief Academic Officer and will report to the CPS CEO.

The relationship between Catalyst: Bremerton's senior leadership team and the rest of the staff will be collaborative. For the first two years of operation the Catalyst: Bremerton leadership team will consist of the two co-founders, the Director of Finance and Operations, the Family/Community Engagement

Manager and the school's Office Manager. In Year 3, each of these employees except the Office Manager will shift to the CMO office. At this point a new Principal, Assistant Principal/Learning Specialist, and an Operations and Business manager will be hired at the school and this group, along with the Office Manager, will be the school-based leadership team.

From there, the home office of the CMO will grow as needed to deliver services to Catalyst: Bremerton and other campuses that eventually open.

Board Processes to Ensure Mission Achievement

The CPS Board of Directors will monitor the academic, financial, and operational health of the organization so that they can ensure that the organization and schools are on track to fulfill their mission. CPS will create a detailed data dashboard that will hold relevant data regarding student academic performance, financial viability and sustainability, and operational excellence. This dashboard will be updated monthly and will be reviewed by the full board at board meetings and at board committee meetings, once established. In addition to the dashboard the Board will review monthly reports covering other topics such as data related to human resources, compliance, and more.

CPS has developed rigorous guidelines for opening new schools. These guidelines are built on best practices from high-performing charter management organizations such as UP Education Network and Impact Public Schools. These guidelines, which collectively form a greenlighting process the Board will use to determine when and where new schools will be launched, include:

- **Community engagement:** CPS seeks to launch schools where there is a measurable demand from parents and community for a new school option. There must be a core group of parent and community leaders in any new community who are willing to advocate for the school's launch.
- **Serving high-needs students:** We believe that for schools to be equitable, they must serve a significant percentage of students who are traditionally considered as "at-risk." These include scholars who identify as people of color, scholars who receive free and/or reduced lunch, scholars who would otherwise attend low-performing schools, scholars who have been identified as English Learners, and/or scholars with disabilities. CPS also aims to launch schools where there is a demonstrated need for a new school option, as evidenced by growing enrollment or lack of high-quality school options in the community.
- **Access to facilities:** Before green-lighting, the CPS board will complete an analysis of available facilities and/or paths to secure facilities.
- **Presence of a local community college and/or university:** CPS aims to launch schools in communities that have access to higher education as these organizations provide a pipeline of talent for the schools.
- **Political landscape:** CPS aims to open schools in districts or regions of the state where the political climate is conducive to opening schools.

The following factors would lead CPS to reassess its ability to open additional campuses:

- Facilities
 - Lease not signed by nine months prior to school opening
 - Occupancy costs exceed 10 percent of average daily attendance
 - Failure to meet key construction milestones
 - Failure to receive zoning or permits needed
- Financials

- Enrollment configuration is off-model
- Projected scale-up costs exceed projected start-up philanthropy
- Anticipated grants are not received
- Authorization/Charter Contract
 - Charter not likely to be received at a minimum of nine months before opening of school
 - Failure to meet any chartering milestones
 - Authorizing agency changes terms of charter contract

Provision of Educational Management Services

Beginning in Year 3, when the CMO will be established, each school will contribute 10% of their revenue to CPS. This revenue will be used to provide the following:

- Hiring and management of school-based principal;
- Operations and ancillary services (back office, food, technology, transportation);
- Student recruitment services;
- Facilities acquisition and management;
- Human resources and staff recruitment/retention;
- Leadership training, coaching, and professional development;
- Financial support (budget development, record keeping);
- Annual report preparation;
- Public relations;
- Teacher professional development; and
- Compliance and support for authorization, renewal, and reporting.

CPS will work in partnership with each school to agree to an annual Service Agreement that includes a 10% service fee for supports provided, allowing each school principal to focus on instructional leadership.

Section 29, numbers 2, 3, and 4: These sections do not apply to Catalyst: Bremerton as we currently do not operate any schools.

CATEGORY 7: FEDERAL CHARTER SCHOOL PROGRAM GRANT APPLICATION
Section 30: CSP Planning and Implementation Grant

Catalyst knows that in order to achieve our mission, we must create a world-class educational program that is based on a foundation of financial and operational sustainability. Thus, the founding team at Catalyst has developed strong operational norms and structures to ensure that we are practicing fiscal and operational responsibility from the start. We have created a detailed start-up plan that is designed to ensure clarity on key tasks that need to be accomplished during our planning period as well as once the school has launched. Receipt of the CSP planning and implementation grant will ensure that Catalyst can meet key benchmarks and begin with a strong start academically, operationally, and financially.

1 & 2. Goals and Use of Funds

Below are Catalyst's goals for the Charter Start-Up Planning (CSP) Grant. Attachment 35 provides a budget and budget narrative only for these goals as they will be achieved during the planning grant period. If awarded Implementation grant, Catalyst would use these funds to bolster student recruitment and outreach efforts, purchase allowable student technology and curricular materials, and fund other implementation year activities.

Goal 1:

- Catalyst will develop a full standards-aligned and rigorous curriculum for grades K-8 by May of 2020, including course scope and sequence documents, implementation guides, performance and paper and pen assessments, and related rubrics.
 - Measure(s) of Assessment:
 - Completed K-8 scopes and sequence documents for humanities, mathematics, and Change-Maker Space
 - Completion of performance and paper-based assessments for each content area for all grades K-8
 - Completion of relevant rubrics for each course and grade level, K-8
 - Objectives:
 - Develop a comprehensive project plan for development of each course for all grade levels by May of 2019
 - Research Learning Management tools and platforms to support curriculum development and sharing from March to June 2019
 - Develop curricula materials from March to August 2019
 - Pilot elements of the curricula with potential students in June and July of 2020

Of these funds, \$195,000 will be allocated to the development of the Catalyst curriculum to ensure a strong start to the Catalyst academic program by the fall of 2020. This amount will support the salary of each of the 2 school co-founders who will dedicate approximately three fourths of their time to develop elementary and middle school curricula during the planning year. Co-founder Tatiana Epanchin will lead the creation of curricular materials and assessments for the elementary grades of the school and co-founder Amanda Gardner will lead the development of curricular materials and assessments for the middle school. This work will ensure that that curricula developed for the school is standards-aligned and that we have developed aligned tools to measure student progress. The \$195,000 will support the salary of each co-founder, which equates to 75% of each person's salary in the planning year.

Goal 2:

- Catalyst will increase the capacity of school co-founders and board members to create an educational program that is rooted in diversity, equity, and inclusion (DEI) and is culturally relevant by participating in Culturally Relevant Teaching and the Brain workshops and events, and by participating in DEI intensive sessions with facilitators such as Ana Becerra and/or Caroline Hill. School co-founders will also participate in professional development related to project-based learning offered by organizations such as the Buck Institute.
 - Measure(s) of Assessment:
 - Pre- and post-educator skills development rubric completion related to DEI and culturally responsive practices
 - Completion of four Change-Maker Space project plans per grade level for K, 1, 5, and 6
 - Assessment of each project for cultural relevance and commitment to DEI
 - Objectives:
 - Register for training by December 2019
 - Complete initial self-assessment before attending training
 - Complete post-assessment after attending training
 - Complete Change-Maker Space project plans and complete relevant assessment rubrics

Of the CSP funds, \$5,000 will be used to cover costs of these professional development activities and related travel. One school co-founder will attend the Culturally Relevant Teaching and the Brain workshops. In addition, the full Catalyst board and founding team will participate in the DEI intensive. It is anticipated that registration and for the Culturally Relevant Teaching sessions will be \$700 with \$800 dedicated to travel. Program fees for the DEI intensive will be \$3,000 with travel for the facilitator totaling \$500.

Catalyst will be the first charter school in Kitsap County, and due to the school's commitment to serving a population that represents the diversity of Bremerton and the surrounding communities, we feel that allocating these resources to community engagement efforts is vital to our success.

CSP funds used to meet these goals will not be used in conjunction with any other federal programs administered by the U.S. Secretary of Education. Additional sources of start-up funding will come from philanthropic sources.

3. Continued Operation

CSP funds will be used to cover one-time initial costs or costs that, over time, will move to the core operational budget of the school. All salaries represented in this budget, as well as related benefits, and all other costs will be covered by the school's budget once CSP funding expires.

4. Ongoing Relationship with Authorizer

Catalyst is committed to ensuring that the relationship between the school and authorizer is clear and transparent to school stakeholders and to the public. As such, upon approval, Catalyst: Bremerton will sign a 5-year contract with the Washington State Charter School Commission, that will contain clear expectations for school performance. Catalyst: Bremerton will fulfill expectations of the Commission's performance framework and will participate in all necessary reviews for compliance to state and federal laws, the charter contract, and performance. These reviews will be done in conjunction with the Office of

Superintendent of Public Instruction. Each year, Catalyst: Bremerton will provide a report to the Commission that describes our school's performance against the expectations laid out in the performance framework.

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Catalyst: Bremerton

Section 1: Attachment 1

Contents:

- Pending Authorization and School Opening Form

PENDING AUTHORIZATION AND SCHOOL OPENING

Does the applicant have charter school proposals under consideration by any other authorizer(s) in the United States? ☐ Yes ☒ No

If yes, complete the table below, adding lines as needed.

State	Authorizer	Proposed School Name	Proposal Due Date	Decision Date

Does the applicant have new schools approved but not yet open elsewhere in Washington or the United States? ☐ Yes ☒ No

If yes, complete the table below, adding lines as needed.

State	Authorizer	City	School Name	Opening Date



Catalyst: Bremerton

Section 2: Attachment 2

Contents:

- Letter of Support: Partnering for Youth Achievement
- Letter of Support: Our Gems
- Letter of Support: Transcend Education
- Letter of Support: Silicon Schools Fund
- Letter of Support: Impact Public Schools
- Letter of Support: Teach for America
- List of Community Engagement Activities Throughout Application Period
- Catalyst Community Presentation
- Design Team Artifacts
- Catalyst Contract for Excellence
- Catalyst Recruitment Materials
- Family and Community Engagement Core Beliefs
- Sample Newsletter
- Sample Design Team Newsletter
- Life Cycle of an Organizing Campaign
- Timeline and Ways to Engage for Board and Design Team
- Photos of Community Events and Design Team Meetings



February 12, 2019
Re: Application for Catalyst Public Schools

To Whom It May Concern,

I write to you in support of the application that Ms. Amanda Gardner and Ms. Tatiana Epanchin have submitted to open Catalyst: Bremerton in the fall of 2020. They have been working with a team of community members through a design team process to understand what the community and families are looking for in terms of excellent educational opportunities. We honor that they are seeking the voices and insights of the people they will be directly serving in years to come.

As the Pastor of Mt. Zion Missionary Baptist Church, one of my roles is to serve young people aged 8 - 24 as the branch director of our Partnering for Youth Achievement (PYA) Program. I, along with our Mentor Coordinator, Tazsja Green, work alongside Faith Based Organizations, Bremerton School District, and Bremerton Police Department to support at-risk youth by providing role models through mentoring circles. Our mentoring circles assist our young people to achieve their full academic, civic, social, and spiritual potential. It is our aim to focus on the 'whole' individual- be it mind, body, or spirit. Our ultimate mission is to instill a sense of greatness in our youth as they prepare to become independent adults.

Currently there are significant inequities in the educational system in the State of Washington. There is not only an achievement gap but there is also an opportunity gap regarding the quality of education that is afforded African American students as compared to their European American counterparts. Disproportionality has been documented in the areas of academic achievement including rates of on time graduation, dropping out of school, suspensions and expulsions. Statistics have also shown that there is an overrepresentation of African American students in special education and an underrepresentation in advanced placement classes and programs for gifted and talented students. Additionally, school personnel consisting of teachers, counselors, principals, and other administrative staff do not mirror the numbers of African American students represented in schools across the state, once again highlighting the disproportionality and educational disparity that currently exists.

It is our hope that Catalyst Public Schools' foundation aligns with the work we are doing at PYA and include a curriculum that adequately represent the rich legacy and heritage of African Americans as well.

It is our belief that because of Ms. Gardner and Ms. Epanchin commitment to supporting Bremerton's diverse scholars to live full lives and to succeed in college, career and life; they will support the intentional hiring of African American teachers in proportion to the number of students served in each district. Like we are, they are determined to ensure that each of their students has the authentic opportunity to cultivate their critical hope and the optimism required to become leaders and responsible adults in our community. It is our hope the Catalyst Public Schools become a critical avenue to changing outcomes for children in a community where far too many are left behind.

Thank you for your consideration of Catalyst's application to open a school in our city. Please call us at 360-377-9169 should you need any additional information from me at this time.

Sincerely,

Pastor Richmond A. Johnson

Tazsja Green, Mentor Coordinator



February 1, 2019

Re: Application for Catalyst Public Schools

To Whom It May Concern,

I write this letter in support of Catalyst Public Schools' charter application. I founded OurGEMS (Girls Empowered through Mentorship and Service) in Bremerton, WA. We empower girls in Kitsap County to reach their fullest potential by building the permanent skills and resources that cannot be taken away. Through mentoring, we promote self-esteem, the value of education, and the development of leadership skills by the introduction of diverse experiences and perspectives. We encourage girls to advocate for themselves educationally, excel in school, attend college, and return to their communities as successful women.

I see the launch of Catalyst Public Schools as instrumental to providing more academic and social opportunity to Bremerton's young people. I have been in frequent dialogue with Ms. Amanda Gardner and Ms. Tatiana Epanchin over the last eighteen months and I see Catalyst's mission to support diverse scholars to live full lives and to succeed in college, career, and life as tightly aligned with the work our organization does. This is especially apparent in the leadership opportunities that we so ardently work to provide our young women. Our students and their families deserve academic options in our region and Catalyst Public Schools aims to provide that.

Additionally, Ms. Gardner has spent the last year as one of Our Gems' volunteer mentors and we have appreciated her work with our youth at the middle school level. I have seen her work and demeanor firsthand with students and your approval of Catalyst Public Schools will allow her to engage with even more students in the area.

Please call me at 360-930-1493 should you need any additional information from me at this time.

On behalf of Bremerton's young people and families, thank you for your deep consideration of this application.

Sincerely,

A handwritten signature in black ink, appearing to read "H. Bryant", written in a cursive style.

Harriette Bryant
Founder and CEO

February 12, 2019

Dear Washington State Charter School Commission,

Transcend is a national non-profit organization that works with school leaders to design world class schools. We work to build and spread innovative models in partnership with visionary school communities and we share actionable knowledge to inform the innovation process with evidence-based insights. We believe that just about every facet of society has changed profoundly over the last century and that the skills and mindsets people need to thrive has changed as well. In most schools across our country, students are sitting in classrooms that look like they did a century ago; one designed for the industrial era in which we lived at the time. At Transcend, we believe that the skills current and future students need require us to redesign schools so that the fast-changing 21st century doesn't leave any child behind. Our students need learning mindsets, creativity, communication, collaboration, critical consciousness, and leadership skills in addition to academic skills and knowledge.

Upon learning about Amanda Gardner's and Tatiana Epanchin's work with Catalyst Public Schools, we recognized that we have a shared interest and belief about what scholars in Kitsap County deserve educationally. We invited Ms. Gardner and Ms. Epanchin to be a part of Transcend's School Incubator since the summer of 2018. We have worked together to plan their Design Team Meetings with the Bremerton Community. Together, we have planned thoughtful work for the Design Team to engage in including activities around re-imagining the future and what it will take to solve some of the most pressing problems in our world. Additionally, we worked together to design and implement an empathy interview protocol in attempt to get under-represented voices into the room. Their work with us is still in progress as we work to complete and realize Catalyst Public Schools' Dream Canvas.

In our work with Ms. Gardner and Ms. Epanchin, we have been particularly struck by their entrepreneurial orientation to take a small amount of collaborative thought partnership and run with it while also being deeply rooted in keeping equity in their school design at the forefront – as evidenced by their launching community design team meetings and completing three within a short period of time. Their belief in what is possible for young people in their county is clear and they have the experience and learning stance to be successful. They have the support of their community as seen in Design Team attendance and participation. We have confidence that the model they are cultivating aligns with our mission and vision for what is possible in education across our country. Please reach out if there is anything we can do to support Catalyst Public Schools charter application. I can be reached at 347-633-4490 and crystal@transcendeducation.org.

Thank you for your consideration,



Crystal P. Ward
School Design Partner,
Transcend



Jeff Wetzler
Co-Founder,
Transcend



Aylon Samouha
Co-Founder,
Transcend

January 29, 2019

Re: Application for Catalyst Public Schools

Dear Charter School Commissioners,

It is my pleasure to support Amanda Gardner's and Tatiana Epanchin's application for Catalyst Public Schools. I have known both of these impressive educators for over a decade, and I believe deeply in their leadership and ability to build and lead exceptional schools. As the CEO of Silicon Schools Fund, my full time job is to evaluate potential school founders and fund the best of them in the Bay Area to open new and innovative schools. I would definitely provide startup funding to either Ms. Gardner or Ms. Epanchin based on their proven track records, my own collaboration with them previously, and the fact that either one is talented enough to successfully launch a new innovative schools – and together they are a force to reckon with.

Both Ms. Gardner and Ms. Epanchin have built and led schools that empower students to guide their own learning, to pursue their interests, and will build an exceptional team of educators to make that happen. Ms. Gardner opened and led Boston Preparatory Charter Public School, one of Boston's highest achieving schools to date in addition to co-founding UP Academy Charter School of Boston, an organization that partnered with Boston Public Schools to turn around its most flailing high schools. Under her leadership, 100% of BPCPS graduates matriculated into 4-year colleges and universities and nearly 85% of these scholars have graduated from college. At UP, Ms. Gardner's leadership ensured that the school went from being one of the lowest performing middle schools within the Boston Public Schools to the top-performing middle school in mathematics, as measured by student growth, in only 1 year. Over the last five years, I have worked with Ms. Gardner through her work at Innovate Public Schools. In that capacity, I have seen her mentor leaders to write and execute exceptional school models, work with families to organize in the community, and advocate on behalf of students at the city, county, and state levels. She has a strong held belief that all students can achieve at high levels, realize their hopes and dreams, and be the change-makers they want to be. I have seen firsthand her work across a variety of organizations and school developers to determine what elements of a school model must be in place to ensure success for all students. She has helped design and launch over 13 schools, many of which have received prestigious recognition for being among the most innovative school models in our country, and we have directly partnered on two schools together where I have seen first hand how talented and successful she is at school design, mentoring leaders, and executing on the most minute details.

Ms. Epanchin's also has an extensive track record of success. As principal of Aspire: Monarch, her school won the National Title One Award for doing the most effective work to close the achievement gap in the state of California. Her school was an EPIC award winner multiple years in a row, and educational leaders across the country came to learn from her. Ms. Epanchin was then superintendent of Aspire Public Schools in the Bay Area, and Silicon Schools Fund supported several Aspire schools in their launch or adoption of a blended learning model. We saw Ms. Epanchin's ardent belief that all students can achieve at high levels regardless of zip code when teachers have the tools and materials they need to make that happen.



Please do not hesitate to reach out should you like to discuss the merits of Ms. Gardner and Ms. Epanchin as leaders or why I have such confidence that they will launch schools that you are proud to have serving the families in Washington. The schools led by these exceptional leaders will benefit all students in the Kitsap Peninsula. If they were to open this network of schools in our geography, we would be backing them 100%.

Sincerely,

A handwritten signature in black ink that reads "Brian Greenberg". The signature is fluid and cursive, with the first name "Brian" and last name "Greenberg" clearly legible.

Brian Greenberg
CEO, Silicon Schools Fund





February 12, 2019

Ms. Cindi Williams, Chairperson
Washington State Charter School Commission
P.O. Box 40996
Olympia, WA 98504-0996

Dear Chair Williams and Members of the Commission,

It is my pleasure to write to you in support of Catalyst Public Schools' charter application. The commitment they have expressed to serving the diverse needs of students in the Bremerton area strongly aligns with our mission at Impact Public Schools, and we have incredible respect for their experienced founders and their strong founding board.

Catalyst Co-Founders, Amanda Gardner and Tatiana Epanchin, have both held impressive careers that focus on increasing educational opportunities for youth and creating equity-driven, innovative schools. I have had the opportunity to get to know them both on a personal level and have much confidence in the work they are committed to in Bremerton. Tatiana is a founding board member of Impact Public Schools and has played a critical role in supporting our launch.

Both Amanda and Tatiana's expertise on school leadership, and their proven ability to close the opportunity gap throughout their careers, give me nothing but confidence in Catalyst's success. They are two of the strongest school leaders I know nationally, and we are so thrilled they are here in Washington and committed to the charter movement.

The approval of Catalyst's charter application would bring a truly rigorous and personalized elementary school model to Bremerton and eventually improve outcomes for students across our state by serving as a proofpoint for all public educators, community partners and families who know what students are capable of when held to high standards and provided with targeted supports. I urge the Commission to approve Catalyst's application, as we need leaders like them in the Washington charter sector and Impact is eager to continue collaborating with them.

Sincerely,

A handwritten signature in black ink that reads 'Jen Wickens'.

Jen Wickens
CEO
Impact Public Schools

Washington State Charter School Commission
1068 Washington Street SE
Olympia, WA 98501

February 8, 2019

To whom it may concern,

I write this letter on behalf of Amanda Gardner and Tatiana Epanchin, two Teach for America alums who are dedicated to creating a school where all children can learn, thrive and reach their greatest potential. As the Executive Director of Teach for America, Washington, I am grateful that these alumni are working with Bremerton's diverse community to design Catalyst Public Schools together. For the last two years, I have served on the board of Impact Public Schools with Ms. Epanchin. In that work, I have had the opportunity to hear her vision and passion for this work and what is possible for our young people. My role affords me the ability to look back at the track records of both of these leaders, and they have impacted countless students across the country. I am excited that they want to continue that work here in Washington.

At Teach for America, we believe that potential is equally distributed across lines of race and class, but in our country today, opportunity is not. We see it as our job to work tirelessly to realize the day when every child has an equal opportunity to learn, grow, influence, and lead. This belief is squarely represented in the mission of Catalyst Public Schools. Ms. Gardner and Ms. Epanchin are not satisfied with the statistic that 17% of black and 22% of LatinX 8th graders are proficient in reading and math compared to 45% of their white counterparts. I see Catalyst Public Schools as part of the solution to getting to a different outcome for our students because I know that children are capable of incredible things when they are given the opportunities they deserve and the support that they need. I am certain that Ms. Gardner and Ms. Epanchin believe that too.

My role offers me the privilege to see schools across our state and our country. I have seen first hand that there is reason to have critical hope. There are pockets of great success in our country. Our region should be no exception and Catalyst Public Schools simply offers one more lane in which that can happen for children. In the next 20 years, it has been predicted that 70,000 new jobs will be added to the professional sector in our region. Building a school where the great potential of students will be cultivated, honored, and celebrated will add to our Puget Sound region for generations to come.

Please reach out to me at anthony.byrd@teachforamerica.org should I be able to answer any questions or concerns I might be able to address.

On behalf of students,

Anthony Byrd
Executive Director, Washington

Section 2: Attachment 2

List of Community Engagement Activities and Associated Artifacts

Community Meetings and Outreach

Date	Meeting/Event	Topic(s)
January 2, 2018	Equity in Education Coalition of Washington	<ul style="list-style-type: none">Context and relationship building
January 3, 2018	Our Gems	<ul style="list-style-type: none">Relationship buildingInitial feedback for Charter
January 4, 2018	Impact Public Schools	<ul style="list-style-type: none">Context and relationship buildingSchool visit
January 4, 2018	SOAR Board Member Meeting	<ul style="list-style-type: none">Context and relationship building
January 12, 2018	Washington Roundtable	<ul style="list-style-type: none">Context and relationship building
January 16, 2018	Center for Reinventing Public Education	<ul style="list-style-type: none">Context and relationship buildingUnderstanding WA charter/district context
January 20, 2018	Kitsap County Council for Human Rights	<ul style="list-style-type: none">Community engagementAdvocating for human rights awareness in the county
January 27, 2018	Kitsap Strong Regional Meeting	<ul style="list-style-type: none">Understanding Bremerton educational landscape
February 8, 2018	Kitsap Strong	<ul style="list-style-type: none">Relationship buildingInitial feedback for Charter
February 13, 2018	Getting Smart	<ul style="list-style-type: none">Context and relationship building
February 15, 2018	Bremerton Mayor	<ul style="list-style-type: none">Relationship buildingInitial feedback for Charter
February 15, 2018	BSD School Board President	<ul style="list-style-type: none">Relationship buildingInitial feedback for Charter
February 20, 2018	Kitsap County Council for Human Rights	<ul style="list-style-type: none">Community engagementAdvocating for human rights awareness in the county
March 5, 2018	Green Dot Public Schools	<ul style="list-style-type: none">Context and relationship building

Date	Meeting/Event	Topic(s)
March 15, 2018	BSD Superintendent	<ul style="list-style-type: none"> Context and relationship building Overview of school model and plans
March 15, 2018	Juneteenth Planning Meeting	<ul style="list-style-type: none"> Grassroots community planning meeting
March 20, 2018	Kitsap County Council for Human Rights	<ul style="list-style-type: none"> Community engagement Advocating for human rights awareness in the county
March 21, 2018	Community Focus Group	<ul style="list-style-type: none"> Catalyst Mission, Vision, Values Community Feedback
March 24, 2018	SOAR/Seneca	<ul style="list-style-type: none"> Context and relationship building Supporting local school development
March 29, 2018	Juneteenth Planning Meeting	<ul style="list-style-type: none"> Grassroots community planning meeting
April 17, 2018	Kitsap County Council for Human Rights	<ul style="list-style-type: none"> Community engagement Advocating for human rights awareness in the county
April 19, 2018	Juneteenth Planning Meeting	<ul style="list-style-type: none"> Grassroots community planning meeting
April 21, 2018	We are College Bound Kitsap Strong event	<ul style="list-style-type: none"> College-going support and event Volunteered
April 23, 2018	Islandwood	<ul style="list-style-type: none"> Grassroots community planning meeting
May 1, 2018	BSD School Board President	<ul style="list-style-type: none"> Providing updates on school planning Ongoing school planning + feedback
May 15, 2018	Kitsap County Council for Human Rights	<ul style="list-style-type: none"> Community engagement Advocating for human rights awareness in the county
May 17, 2018	Juneteenth Planning Meeting	<ul style="list-style-type: none"> Grassroots community planning meeting
June 16, 2018	Juneteenth Freedom Festival	<ul style="list-style-type: none"> Grassroots community planning meeting

Date	Meeting/Event	Topic(s)
June 19, 2018	Kitsap County Council for Human Rights	<ul style="list-style-type: none"> Community engagement Advocating for human rights awareness in the county
June 20, 2018	Leadership Kitsap	<ul style="list-style-type: none"> Networking event
July 17, 2018	Kitsap County Council for Human Rights Meeting	<ul style="list-style-type: none"> Community engagement Advocating for human rights awareness in the county
August 1, 2018	Emily Randall Campaign Event	<ul style="list-style-type: none"> Networking event
August 16, 2018	Community Member 1:1	<ul style="list-style-type: none"> Building relationships with parents and community members
August 21, 2018	Kitsap County Council for Human Rights Meeting	<ul style="list-style-type: none"> Community engagement Advocating for human rights awareness in the county
August 23, 2018	Leadership Kitsap Meeting	<ul style="list-style-type: none"> Networking Building relationships Establishing grass tops support
September 7, 2018	Leadership Kitsap Retreat	<ul style="list-style-type: none"> Networking Building relationships Establishing grass tops support
September 13, 2018	Our Gems	
September 13, 2018	Kitsap County Parent Coalition	
September 14, 2018	Olympic College--Office of Diversity, Equity and Inclusion	<ul style="list-style-type: none"> Meeting with Cheryl Nuñez, VP of Diversity, Equity, and Inclusion
September 18, 2018	Kitsap County Council for Human Rights Meeting	<ul style="list-style-type: none"> Community engagement Advocating for human rights awareness in the county

Date	Meeting/Event	Topic(s)
September 19, 2018	BSD Superintendent	<ul style="list-style-type: none"> Relationship building Updates on school model and community work Exploration of opportunities to collaborate
September 21, 2018	Kitsap Immigration Assistance Center	<ul style="list-style-type: none"> Relationship building Brainstorming outreach to families
September 22, 2018	Community Kick-Off	<ul style="list-style-type: none"> Catalyst Mission, Vision, Values Community Feedback
October 2, 2018	Bainbridge Island Community Foundation	<ul style="list-style-type: none"> Relationship building Connections to community partners and potential funders
October 3, 2018	Learning Accelerator	<ul style="list-style-type: none"> Board and advisory group recruitment
October 5, 2018	Kitsap Strong Resiliency Conference	<ul style="list-style-type: none"> Learning in community Workshops on trauma informed practices and resiliency
October 8, 2018	Our Gems	<ul style="list-style-type: none"> Youth mentoring at Bremerton middle school
October 10, 2018	Civil Survival Focus Group (a group for formerly incarcerated individuals and parents)	<ul style="list-style-type: none"> Catalyst Mission, Vision, Values Community Feedback
October 10, 2018	Mesa Redonda Meeting	<ul style="list-style-type: none"> Network meeting of community partners focused on serving immigrant families Relationship building
October 12, 2018	Leadership Kitsap Convening	<ul style="list-style-type: none"> Networking Building relationships Establishing grass tops support
October 14, 2018	Trunkival Festival	<ul style="list-style-type: none"> Community outreach Developing relationships with families
October 15, 2018	Our Gems	<ul style="list-style-type: none"> Youth mentoring at Bremerton middle school

Date	Meeting/Event	Topic(s)
October 16, 2018	Kitsap County Council for Human Rights Meeting	<ul style="list-style-type: none"> Community engagement Advocating for human rights awareness in the county
October 20, 2019	Bremerton African American Ministerial Alliance	<ul style="list-style-type: none"> Presentation about school model Board member recruitment Exploring opportunities to work with families
October 22, 2018	Our Gems	<ul style="list-style-type: none"> Youth mentoring at Bremerton middle school
October 23, 2018	Kitsap Immigration Assistance Center--Family Clinic	<ul style="list-style-type: none"> Outreach to Latinx community via canvassing Design team recruitment
October 23, 2019	Rice, Fergus, Miller Community Engagement Team	<ul style="list-style-type: none"> Relationship building Connections to community partners
October 29, 2018	Our Gems	<ul style="list-style-type: none"> Youth mentoring at Bremerton middle school
October 29, 2018	Design Team Meeting	<ul style="list-style-type: none"> Catalyst Mission, Vision, Values Co-Creation Topic: "For Whom Are Schools Intended"
October 30, 2018	Parent 1:1 Meeting	<ul style="list-style-type: none"> Establishing relationships with parents
November 1, 2018	Olympic Educational Services District	<ul style="list-style-type: none"> Relationship building Discussing services the OESD can provide
November 5, 2018	Our Gems	<ul style="list-style-type: none"> Youth mentoring at Bremerton middle school
November 5, 2018	Sound West Group	<ul style="list-style-type: none"> Facilities exploration Initial meeting with broker
November 7, 2018	Kitsap Community Resources--Head Start	<ul style="list-style-type: none"> Meeting with program manager for Bremerton head start and ECAP programs Brainstorm for community outreach
November 7, 2018	Bremerton City Council	<ul style="list-style-type: none"> Public comment about the school and offer to meet 1:1 with council members

Date	Meeting/Event	Topic(s)
November 16, 2018	Leadership Kitsap Convening	<ul style="list-style-type: none"> • Networking • Building relationships • Establishing grass tops support
November 19, 2018	Our Gems	<ul style="list-style-type: none"> • Youth mentoring at Bremerton middle school
November 19, 2018	Design Team Meeting	<ul style="list-style-type: none"> • Co-Creation Topic: "What does the future hold for us and our scholars?" • Student Empathy Interviews Overview
November 25, 2018	Sinclair Missionary Baptist Church	<ul style="list-style-type: none"> • Church Service Presentation/Announcement • Follow up with interested parents and community
November 26, 2018	Our Gems	<ul style="list-style-type: none"> • Youth mentoring at Bremerton middle school
November 27, 2018	Kitsap Immigration Assistance Center--Family Clinic	<ul style="list-style-type: none"> • Outreach to Latinx community via canvassing • Design team recruitment
December 1, 2018	Community Canvassing	<ul style="list-style-type: none"> • Outreach to Latinx community via canvassing • Design team recruitment
December 3, 2018	1:1 with Marcella Atwood, Naval School Liaison Officer	<ul style="list-style-type: none"> • Understanding the military context • Strategies to serve military families
December 3, 2018	Our Gems	<ul style="list-style-type: none"> • Youth mentoring at Bremerton middle school
December 5, 2018	Bay Vista Family Meet and Greet	<ul style="list-style-type: none"> • Building relationships with students, families, and the Bremerton police department
December 6, 2018	Holly Ridge Center Meeting	<ul style="list-style-type: none"> • Understanding special education practices in the county • Building relationships
December 6, 2018	Central Kitsap School District Superintendent and Staff	<ul style="list-style-type: none"> • Building relationships • Updating about school plans to launch
December 7, 2018	Kitsap County Commission for Human Rights Conference	<ul style="list-style-type: none"> • Conference held by the council • Volunteer opportunity

Date	Meeting/Event	Topic(s)
December 8, 2018	People's Institute Community Luncheon	<ul style="list-style-type: none"> • Building relationships • Community building
December 10, 2018	Our Gems	<ul style="list-style-type: none"> • Youth mentoring at Bremerton middle school
December 10, 2018	Our Gems Youth Mentoring Meeting at Bremerton High School	<ul style="list-style-type: none"> • Youth mentoring at Bremerton high school • Design team recruitment
December 11, 2018	Partnering for Youth Achievement Community Dinner	<ul style="list-style-type: none"> • Building relationships
December 11, 2018	Community 1:1 Meeting	<ul style="list-style-type: none"> • Building relationships • 1:1 with former Bremerton educator
December 12, 2018	Focus Group with Community at Mesa Redonda Meeting	<ul style="list-style-type: none"> • Feedback on model • Community/relationship building
December 12, 2018	1:1 with Jessica Kirchhofer from Western Washington University	<ul style="list-style-type: none"> • Building relationships • Discussing teacher talent pipeline
December 14, 2018	Kitsap Community Resources Family Meeting	<ul style="list-style-type: none"> • Family outreach
December 16, 2018	Mt. Zion Missionary Baptist Church	<ul style="list-style-type: none"> • Church Service Presentation/Announcement • Follow up with interested parents and community
December 17, 2018	Our Gems	<ul style="list-style-type: none"> • Youth mentoring at Bremerton middle school
December 17, 2018	Parent 1:1 Meeting	<ul style="list-style-type: none"> • Building relationships with parents
December 17, 2018	Empathy Interview Kitsap County Student	<ul style="list-style-type: none"> • Empathy interviews with students for design team meeting
December 17, 2018	Design Team Meeting	<ul style="list-style-type: none"> • Co-Creation of School model with parents, community • Feedback on model • Overview of charter launch process

Date	Meeting/Event	Topic(s)
December 18, 2018	Empathy Interview Kitsap County Student	<ul style="list-style-type: none"> • Empathy interviews with students for design team meeting
December 18, 2018	Empathy Interview Kitsap County Student	<ul style="list-style-type: none"> • Empathy interviews with students for design team meeting
December 19, 2018	Bremerton Mayor	<ul style="list-style-type: none"> • Relationship building • Updates on school planning and launch • Thought partnership around community engagement and facilities
December 29, 2018	Bremerton Superintendent	<ul style="list-style-type: none"> • Relationship building • Updates on school planning and launch
January 5, 2019	Meeting with Bainbridge Island Mayor	<ul style="list-style-type: none"> • Relationship building • Better understanding the Kitsap Community Foundation
January 7, 2019	Our Gems	<ul style="list-style-type: none"> • Youth mentoring at Bremerton middle school
January 7, 2019	Kitsap Community Resources Catalyst Outreach Meeting	<ul style="list-style-type: none"> • Relationship building • Family Outreach Meeting
January 8, 2019	Visit: Downtown School	<ul style="list-style-type: none"> • Best practices visit
January 11, 2019	Leadership Kitsap Convening	<ul style="list-style-type: none"> • Networking • Building relationships • Establishing grass tops support
January 12, 2019	Catalyst Board Retreat	<ul style="list-style-type: none"> • Bremerton neighborhood tour for context building • Panel of parents and design team members with Catalyst board (discussion) • Overview of timeline to launch with next steps
January 14, 2019	Our Gems	<ul style="list-style-type: none"> • Youth mentoring at Bremerton middle school
January 15, 2019	Kitsap County Council for Human Rights Meeting	<ul style="list-style-type: none"> • Community engagement • Advocating for human rights awareness in the county

Date	Meeting/Event	Topic(s)
January 18, 2019	Kindergarten Readiness Event hosted at Naval Base Kitsap	<ul style="list-style-type: none"> Family outreach event for military families
January 21, 2019	Our Gems	<ul style="list-style-type: none"> Youth mentoring at Bremerton middle school
January 28, 2019	Our Gems	<ul style="list-style-type: none"> Youth mentoring at Bremerton middle school
January 14, 2019	Design Team Meeting	<ul style="list-style-type: none"> Co-Creation of School model with parents, community Feedback on model Overview of charter launch process
February 2, 2018	Wanderlust hiring fair	<ul style="list-style-type: none"> Staff recruitment
February 4, 2019	Our Gems	<ul style="list-style-type: none"> Youth mentoring at Bremerton middle school
February 8, 2019	Leadership Kitsap Convening	<ul style="list-style-type: none"> Networking Building relationships Establishing grass tops support
February 9, 2019	Resource Fair for Families of Students with Developmental Disabilities, hosted by Holly Ridge Center	<ul style="list-style-type: none"> Family outreach and recruitment
February 11, 2019	Design Team Meeting	<ul style="list-style-type: none"> Co-creating school with family The day in the life of a Catalyst Scholar
February 11, 2019	Our Gems	<ul style="list-style-type: none"> Youth mentoring at Bremerton middle school
February 18, 2019	Our Gems	<ul style="list-style-type: none"> Youth mentoring at Bremerton middle school
February 25, 2019	Our Gems	<ul style="list-style-type: none"> Youth mentoring at Bremerton middle school
February 19, 2019	Kitsap County Council for Human Rights Meeting	<ul style="list-style-type: none"> Community engagement Advocating for human rights awareness in the county

Date	Meeting/Event	Topic(s)
February 20, 2019*	Tour of Impact Public Schools with Bremerton Superintendent, Mayor, and Catalyst Design Team Members	<ul style="list-style-type: none"> • Relationship building • Seeing high quality schools in action • Understanding the charter context

*Event cancelled due to snow—will be rescheduled for March of 2019.

Sample Catalyst Community Presentation (Slides)



**A new, innovative, non-profit
K-8 charter school
serving the students and families of Kitsap County**

School Founders

Tatiana Epanchin

- Teacher, Social Worker
- Principal, Monarch Academy
- Founding Principal, ERES Academy
- Regional Superintendent
- SVP TFA
- Co-Founder, School Leader Lab
- Board Member Impact Public Schools
- Mother of two 11 year olds



Amanda Gardner

- Teacher
- Co-Founder, Boston Preparatory
- Founding Principal, UP Academy Boston
- VP, Schools Innovate Public Schools
- Member of Kitsap County Council for Human Rights
- Mother of two young boys



Track Records of Success and 30+ Years Experience


Student Achievement Outcomes


 Monarch Academy increase of 150 API points


 ERES Academy increase of 100 API points w/in 1 year

 National Title I Award Recipient
New Leaders EPIC Gold and Silver Winner

Student Achievement Outcomes

 Boston Prep: 100% of graduates have enrolled in 4 year colleges; 85% college persistence

 UP Boston: Top school in district for ELA performance; #1 in state of MA for student growth in Math

 Commendation School for Narrowing Gaps and High Progress
New Leaders EPIC Gold Winner

Charter Schools in WA

- Approved via ballot initiative in 2012
- Current charter law was passed by the legislature in 2016
- Allows creation of up to 40 charter schools over a certain time period
- Currently 13 schools in operation with 1 school to open in Fall of 2019
- Are given certain autonomies in return for strict accountability for delivering student achievement results



Who Do Washington Charters Serve?



- Recent CRPE study found that WA charters are serving **more** students with disabilities than their home districts
- 64% of charter students in WA are students of color (44% statewide)
- 58% of charter students in WA qualify for free or reduced-price lunch (44% statewide)
- 39% of charter teachers are people of color (13% statewide)

How Washington Charters Are Different



- Required to be non-profit entities
- Must serve traditionally “at-risk” students
- Incredibly high standards for authorization and renewal
- To be authorized must
 - Be designed in partnership with community
 - Provide community need and demand
 - Be led by proven school leaders

SCHOOL TIMELINE



PLAN

CHARTER APPROVAL
BUILD SUPPORT
DESIGN MODEL
2018 + 2019



LAUNCH

FACILITY
ENROLL STUDENTS
HIRE STAFF
K, 1, 5, 6
2020



GROW

FULL K-8 SCHOOL
EXPLORING HS
FULLY ENROLLED
BY 2023 SY

Building In Partnership With Community

- Community Kick-Off
- 2 Community Forums
- Monthly Community Design Team
- Countless 1:1 conversations with parents, community leaders
- Engagement with BSD, CKSD, SKSD



Mission

Catalyst: Bremerton supports our diverse scholars to live full lives and to succeed in college, career, and life. Scholars will find their purpose and passion so that they can cultivate the critical hope, optimism, and leadership essential to be catalysts in their community and world.

Our graduates build a strong understanding of themselves, envision the world in which they want to live, and develop the agency to access the future of their dreams.



Core Beliefs

- **ALL** students have unlimited potential and it is our job to ensure they are prepared for college, career, and life
- Each student is unique and deserves a tailored education
- Emotional health and wellness is just as important as academic mastery
- Schools, and students, can be catalysts of community change





CORE VALUES

Equity

Leadership

Joy

Courage

Achievement

Wellness



Diversity, Equity,
Inclusion



Rigorous Academics +
Dynamic Supports



Wellness + Leadership



World-Class Staff
Development



Sunrise + Sunset



Deeper Learning Blocks



Change-Maker Space



Enrichment, Leadership +
Wellness

Catalyst Design Team Artifacts

Design Team Agenda

October 29, 2018

Design Team Meeting

Guiding Question: ***For whom are schools designed?***

Agenda:

- 6:00-6:15 Welcome and [Hope + Dreams Energizer](#)
 - Hopes + Dreams for My Community
 - Hopes + Dreams for Our Time Together
- 6:15-6:20 Norms
- 6:20-6:40 Inspiration Activity + Discussion
 - [The Teenager Behind the Empire](#)
 - https://youtu.be/6vaO_GPBAzA
- 6:40-7:10 For Whom Are Schools Designed
 - [Slides 8-14 of Explore the Future Session](#)
 - Compare/Contrast Charts with Inspo Activity
- 7:10-7:30
 - Applications to Catalyst
 - Mission/Vision
 - Quotes related to the vision
 - Call to Action—connecting to families
 - Assessment:
 - *Did you enjoy tonight enough to come back to our next meeting?*
 - *Did you enjoy yourself tonight to bring two friends next time?*

Sample Design Team Activity



Catalyst Design Team

“Empathy” Assignment

What: Each team member talks with at least two school aged people to learn about their experiences in school and what they might like out of a new school option

Why: To get out of our own heads and better understand the perspectives of those different than ourselves... to gather data to inform our design work... to build relationships in the context of our Catalyst design work.

When: Between now and the next meeting

Time and time again, initiatives falter because they are not based on the client’s or customer’s needs and have never been prototyped to solicit feedback. Even when people do go into the field, they may enter with preconceived notions of what the needs and solutions are. This flawed approach remains the norm in both the business and social sectors.”

*(“Design Thinking for Social Innovation”,
Tim Brown & Jocelyn Wyatt)*

GUIDELINES

Who:

Have a conversation/interview with at least two school aged people:

Feel free to talk to more people, but only if you have time.

Time: about 20 minutes each. Longer if you want or are able.

How: Outline of the Process

1. Set up:
 - a. Thank the person for taking the time.
 - i. Introduce the yourself in the context of the Catalyst Design Team.
2. Explain the purpose of the conversation
 - a. You are trying to learn a little bit about what school has been like for the student.
 - b. You are trying to learn what the student dreams of when it comes to school.
 - c. You will not share the names or identification of the student.
 - d. You will not share any information beyond the Design Team.
3. The conversation/interview. (See “Questions to ask” below.) Write down what you can – and do your best to capture quotes that feel significant. Handwriting will likely allow you to feel more connected to the person than typing on a device. You can use other questions too.
4. Close: Thank the person again – and tell them you’ll follow up with an update further into the process.

5. Document: Write/type what struck you: points, themes. Write down at least a few quotes that felt significant. Write down any of your own reflections/responses (e.g. insights, questions, surprises).

Possible Questions to ask:

1. What do you like about your school?
2. Talk about a time when your school supported you?
3. What do you dislike about school?
4. Talk about a time when your school did not support you?
5. What comes to mind when you are asked to think about the perfect school?
6. How is that different than the school you currently attend?
7. Anything else you'd like to share?

During Catalyst Design Team meetings, participants engage in collaborative learning activities to explore what the future has in store for our scholars and to analyze the extent to which most schools are setting them up to succeed in this future. Through this work, the design team comes to clarity around what pillars of the Catalyst model should be to fulfill our mission. Below are a few of the materials we have used for this purpose.

explore the future



This method provokes thinking about how our world is changing and what our students will need to thrive in and transform the future. Ultimately you'll use this to **craft a set of insights** that will guide both the aims of your learning community and the designs themselves.

TIME 2 hours

SUPPLIES Future trend cards, Post its, markers, poster paper.

DESIGN FOR EQUITY

How might my identity and biases show up in what I choose to explore, what people share with me, what meaning I make?

What perspectives are we hearing and whose are missing?

steps

- 1 **Explore trends + provocations:** First, you dig into windows for how the world is changing. For example, what will the job market look like in 20 years? How are demographics changing? We recommend using the ["future trend cards"](#) and dividing and conquering as a group. But this same process applies to other provocations—trend reports, articles from futurists, visiting cutting-edge workplaces.
- 2 **Distill takeaways:** Once you've explored the content, headline your major takeaways. Make them simple statements that can be captured on a post-it and shared with others. For example, "Automation will reshape the job market, benefiting careers that rely on creativity, non-routine tasks, and soft skills."
- 3 **Define implications:** After you've shared out the major headlines of how the world is changing, consider the implications for students. What will that trend (or the collection of trends) demand from our students? For example, "Given jobs will be disrupted more regularly, our students will need to regularly learn new skills to stay competitive."
- 4 **Reflect + prioritize:** At this point, you'll likely have a lot of headlines and potential implications. Looking across them, what major trends emerge? What trends or implications most diverge from the current approach to school or must be accounted for in your design?
- 5 **Craft insights:** Now it's time to synthesize this exploration into a set of sticky and actionable insights. Remember, a strong insight is a statement that illuminates an unknown truth, a poignant tension, something that carries "design energy." These may incorporate other data points/insights you've collected. For example "The future labor market will demand that our students are self-directed, but students spend most of their time following directions." [Capture your insights in your team's Canvas Sandbox!](#)
- 6 **Optional extension to define aims:** It can be incredibly rich to tie exploring the future with a quick sprint on defining graduate aims. With the list of headlines/insights captured, have the group generate the top 5 aims (knowledge, skills, beliefs) that kids must emerge with to be ready to thrive in or transform that world.

climate change and its impact

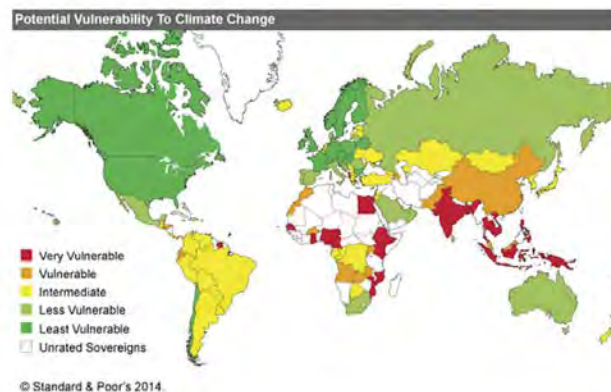
A shifting climate reshapes our world, creating uncertainty about the impact of weather, access to basic resources, and which solutions societies will pursue.

Translating

Climate Change on pace to occur 10 times faster than any change recorded in past 65 million years, Stanford Scientists say.

Not only is the planet undergoing one of the largest climate changes in the past 65 million years, Stanford climate scientists Noah Diffenbaugh and Chris Field report that it's on pace to occur at a rate 10 times faster than any change in that period. Without intervention, this extreme pace could lead to a 5-6 degree Celsius spike in annual temperature by the end of the century. - Bjorn Carey, Stanford report, August 1, 2003

Countries that emit the least, are most vulnerable to the effects of climate change



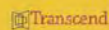
How Boston is rethinking its relationship with the sea

Sea levels are rising, the land is sinking. It's going to become a big problem for some cities on the US East Coast, so in Boston people are thinking the unthinkable - copying Venice and Amsterdam, and becoming a city of canals.



technology unleashes new possibilities and dilemmas

The world becomes hyperconnected as both sophistication and prevalence of technology increase. This opens up new opportunities, while shining a light on the impact of unequal access and complexities of ethical questions that lie ahead.

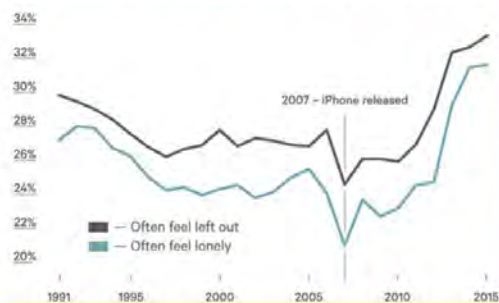


"There's not a single exception. All screen activities are linked to less happiness, and all nonscreen activities are linked to more happiness. Eighth-graders who spend 10 or more hours a week on social media are 56 percent more likely to say they're unhappy than those who devote less time to social media. Admittedly, 10 hours a week is a lot. But those who spend six to nine hours a week on social media are still 47 percent more likely to say they are unhappy than those who use social media even less."

From "Has the Smartphone Destroyed a Generation?"

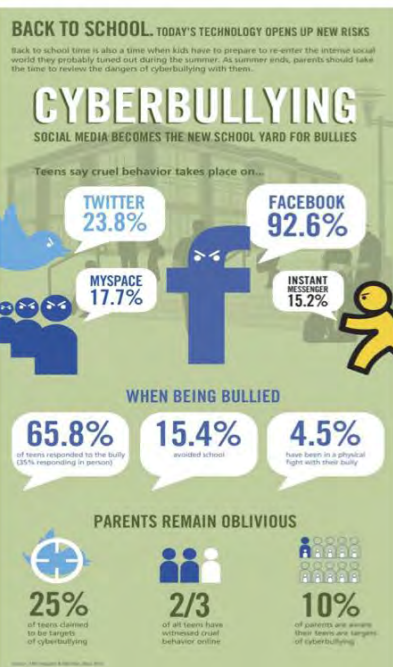
More Likely to Feel Lonely

Percentage of 8th-, 10th-, and 12th-graders who agree or mostly agree with the statement "I often feel left out of things" or "A lot of times I feel lonely"



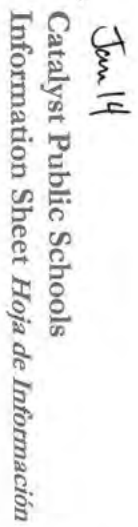
“It’s like the wild west, the Internet. There are no rules.

-Steven Wright



We have Wikipedia because the Internet and the Web have made it easy and cheap to share information, and because they allowed people to experiment with new models of collaboration while minimizing the risks of failure. To be a peer progressive, then, is to live with the conviction that Wikipedia is just the beginning, that we can learn from its success to build new systems that solve problems in education, governance, health, local communities, and countless other regions of human experience. That is why we are optimistic: because we know it can be done. We know a whole world of pressing social problems can be improved by peer networks, digital or analog, local or global, animated by those core values of participation, equality and diversity. That is a future worth looking forward to. Now is the time to invent it.

-From Steven Johnson's Future Perfect



Jan 14
Catalyst Public Schools
Information Sheet *Hoja de Información*

Jan 14
Catalyst Public Schools
Information Sheet *Hoja de Información*

Information Sheet *Hoja de Información*[illegible]



January 14
Catalyst Public Schools
Information Sheet Hoja de Información


Name Nombre	Email Correo Electrónico	Phone Number Número de Teléfono	Do you want to be on the Design Team? ¿Quieres formar parte del equipo de diseño?
Allison			
Kyle			I Don't know yet
SJell			Hopefully so
Patric			PERHAPS
Matt			PERHAPS
Keri			PERHAPS
Danilo			NO.
Patty			Maybe
Justin			
Chin			✓
Brittany			
Leona			Maybe
Anthony			
Parker			yes!

Catalyst Public Schools
Information Sheet *Hoja de Información*

Name <i>Nombre</i>	Email <i>Correo Electrónico</i>	Phone Number <i>Número de Teléfono</i>	Do you want to be on the Design Team? <i>¿Quieres formar parte del equipo de diseño?</i>
Stephen	[REDACTED]	[REDACTED]	
Jeanne	[REDACTED]	[REDACTED]	
Mary	[REDACTED]	[REDACTED]	
Jackie	[REDACTED]	[REDACTED]	Interested
Dorothy	[REDACTED]	[REDACTED]	
Tessie	[REDACTED]	[REDACTED]	
Tracy	[REDACTED]	[REDACTED]	
Brittany	[REDACTED]	[REDACTED]	Yes!

December 2018

12/5 or 12/19

 Catalyst Public Schools
Information Sheet *Hoja de Información*

Name <i>Nombre</i>	Email <i>Correo Electrónico</i>	Phone Number <i>Número de Teléfono</i>	Do you want to be on the Design Team? <i>¿Quieres formar parte del equipo de diseño?</i>
John	[REDACTED]	[REDACTED]	
Pam	[REDACTED]	[REDACTED]	yes
Lee	[REDACTED]	[REDACTED]	I wish!
Joan	[REDACTED]	[REDACTED]	Keep in touch
Michelle	[REDACTED]	[REDACTED]	yes
JOWAN	[REDACTED]	[REDACTED]	YES!
Jacky	[REDACTED]	[REDACTED]	yes!

Nov 2018

Nov. 2018

2/15/2019

IMG_2168.jpg

Catalyst Public Schools
Information Sheet *Hoja de Información*

Name <i>Nombre</i>	Email <i>Correo Electrónico</i>	Phone Number <i>Número de Teléfono</i>	Do you want to be on the Design Team? <i>¿Quieres formar parte del equipo de diseño?</i>
Pam	[REDACTED]	[REDACTED]	YES
Brittany	[REDACTED]	[REDACTED]	YES
Jean	[REDACTED]	[REDACTED]	YES
JOVAN	[REDACTED]	[REDACTED]	YES
Darryl	[REDACTED]	[REDACTED]	YES
Roxie	[REDACTED]	[REDACTED]	YES
Summer	[REDACTED]	[REDACTED]	YES
DEBRA	[REDACTED]	[REDACTED]	YES

October 2018



Catalyst Public Schools

Information Sheet *Hoja de Información*

community Forum ~~Feb 20~~ ^{Feb 20} 2018

[illegible]

Catalyst: Bremerton Contract for Excellence

Mission Statement: Catalyst: Bremerton supports our diverse scholars to live full lives and to succeed in college, career, and life. Scholars will find their purpose and passion so that they can cultivate the critical hope, optimism, and leadership essential to be catalysts in their community and world.

School's Commitment...	Student's Commitment...	Parent/Guardian's Commitment...
The members of the Catalyst: Bremerton Staff agree to:	As a Catalyst: Bremerton Scholar, I agree to:	As a Catalyst: Bremerton Family member I agree to:
Provide rigorous and engaging instruction, aligned with the Washington and Common Core State Standards.	Pursue academic success to the best of my ability. I will participate in class, complete homework and assignments according to stated expectations, and contribute to my peers' learning and success.	Provide my child with a quiet space to complete nightly homework and check that their homework is completed.
Consistently enforce the Catalyst: Bremerton School Code of Conduct, maintaining an environment which is physically and emotionally safe, warm & joyful.	Always follow the Catalyst: Bremerton School Code of Conduct, to the best of my ability.	Support the Catalyst: Bremerton School Code of Conduct
Continuously improve the Catalyst: Bremerton educational program through ongoing professional development and embracing of feedback.	Arrive at school on time, in uniform, every day of the school year that I am healthy.	Ensure that my child arrives at school on time, in uniform, every day of the school year that they are healthy.
Partner with families; inform families of questions or potential obstacles to learning, as they arise, and be a committed educator and mentor.	Attend Catalyst: Bremerton's power hours and other supports if requested by teachers and to ensure my academic success.	Make arrangements so that my child can remain at Catalyst: Bremerton for extra academic and/or social-emotional support, as needed.
Communicate professionally with scholars and families at all times, responding promptly to parent and scholar questions and concerns.	Ask teachers and family for help when I need it and inform teachers and family members about questions and obstacles to learning, as they arise.	Communicate professionally with school staff, responding promptly to school questions and concerns

School's Commitment...	Student 's Commitment...	Parent/Guardian's Commitment...
<p>Model the values of equity, leadership, courage, wellness, joy and achievement in my words, thoughts, and actions.</p>	<p>Demonstrate the values of equity, leadership, courage, wellness, joy and achievement in my words, thoughts, and actions.</p>	<p>Encourage my child to pursue academic and ethical excellence by demonstrating the values of equity, leadership, courage, wellness, joy and achievement in my words, thoughts, and actions.</p>
<p>Challenge scholars to consider the academic and ethical implications of their actions.</p>	<p>Encourage my peers to pursue academic and ethical excellence.</p>	<p>Monitor my child's academic progress by reviewing and returning weekly progress reports sent from the school.</p>

Catalyst Recruitment Flyers in English and Spanish

OUR MISSION AND VISION



MISSION

Catalyst prepares our region's diverse scholars to live, lead, and thrive in college, career, and life. We utilize a combination of rigorous curriculum balanced with just right and dynamic supports to send scholars into the world ready to be catalysts of change.

VISION

An environment structured around equity, courage, scholarship and joy cultivates the hope, optimism and leadership required to change the world.

WHAT MAKES CATALYST UNIQUE?

We fulfill our mission through the following elements:

JOYFUL ACADEMICS

We offer a supportive environment where students and staff are held to a high bar, and where we have fun reaching it. A longer school day and year support scholars to find success.

FAMILIES AS PARTNERS

Families are partners in this work. Each child will have a dream team of community members working together to ensure each child thrives.

WELLNESS + LEADERSHIP

We believe in supporting the whole child. Students' health is prioritized along with academics. Students learn the leadership skills needed to change the world.

WORLD CLASS STAFF

We hire and support amazing teachers so they can support scholars every step of the way. Additional professional development and coaching ensure our teachers' effectiveness.

FREQUENTLY ASKED QUESTIONS

What is a charter school?

Charter schools are independent, public, non-profit schools in WA that are open to all students. They have flexibility with their program and, in return, they are held to higher standards than traditional public school districts.

Who can attend?

Charter schools are free and open to ALL students, including students with disabilities and English Learners. Catalyst will serve Kindergarten, 1st, 5th and 6th grades in the 2020-2021 school year and will grow to serve students in grades K-8.

Does Catalyst provide transportation?

Yes, Catalyst will provide free transportation to the majority of scholars.

CATALYST...

- Es una escuela pública
- Es gratuito
- Todos los estudiantes son bienvenidos, incluyendo estudiantes con discapacidades
- NO requisitos de admisión

catalyst public schools
quiere conocerlo a usted

Comuníquese a @
info@catalystpublicschools.org
para conocerlo
O
acompañenos en una reunión
de equipo de diseño

LLÁMENOS



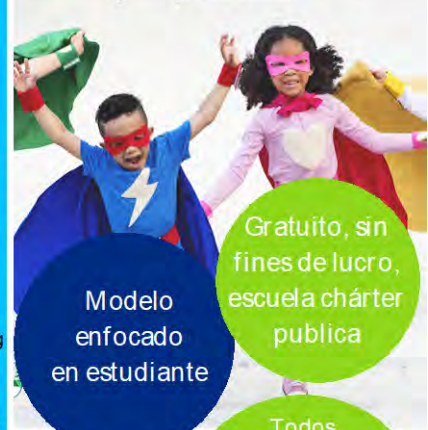
360.453.7085



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Tatiana Epanchin
tatiana@catalystpublicschools.org

Like us on Facebook
@CatalystPublicSchools



Modelo
enfocado
en estudiante

Gratuito, sin
fines de lucro,
escuela charter
pública

0
requisitos
de admisión

Todos
los estudiantes son
bienvenidos,
incluyendo
estudiantes con
discapacidades

Pronto en Bremerton
Otono de 2020; grados K, 1, 5, 6

NUESTRA MISIÓN Y VISION



Misión

Catalyst apoya nuestra diversidad de estudiantes para que vivan vidas llenas y para tener éxito en el colegio, carrera y vida. Estudiantes pueden hallar su propósito y pasión para que puedan cultivar una esperanza crítica, optimismo, y liderazgo esencial para catalizar en su comunidad y mundo.

Vision

Graduados de Catalyst crean un entendimiento fuerte de sí mismos, imaginan el mundo en el cual ellos quieren vivir, y desarrollan la agencia para acceder el futuro de sus sueños.

¿QUE HACE CATALYST UNICO?

Satisfacemos nuestra misión por los siguientes elementos:

ACADEMICOS ALEGRES

Ofrecemos un ambiente de apoyo donde estudiantes y personal están sujetos a una barra alta y nos divertimos en alcanzarlo. Días y años escolares más largos ayudan a que los estudiantes encuentren el éxito.

FAMILIAS COMO SOCIOS

Familias son nuestras parejas en este trabajo. Cada estudiante tendrá un equipo de miembros trabajando juntos para que cada estudiante prospere.

SALUD + LIDERAZGO

Creemos en apoyar el estudiante completo. La salud de estudiantes es prioridad junto con lo académico. Estudiantes aprenden las habilidades de liderazgo que necesitan para cambiar el mundo.

PERSONAL DE PRIMERA CLASE

Contratamos y apoyamos maestros maravillosos para que ellos puedan apoyar a estudiantes cada paso del camino. Desarrollo profesional y entrenamiento adicional aseguran la efectividad de nuestros maestros.

PREGUNTAS FRECUENTES

¿Qué es una escuela charter?

Escuelas charteres son independientes, publicas, sin lucro escuelas en WA que están abiertas para todos los estudiantes. Tienen flexibilidad con su programa y, en cambio, son sostenidos a estándares más altos que de escuelas tradicionales del distrito público.

¿Quién puede asistir?

Escuelas charteres son gratis y abiertas a TODOS los estudiantes, incluyendo estudiantes con discapacidades y aprendices del idioma Ingles. Catalyst servirá a Kinder, primero, quinto, y sexto grados en el año escolar 2020-2021 y crecerá para servir a estudiantes en grados Kinder – 8°.

¿Catalyst provee transportación?

Si, estamos trabajando para asegurar transportación para la mayoría de estudiantes.

Catalyst Family and Community Engagement Core Beliefs:

Catalyst Public Schools FACE Core Beliefs:

We believe that:

1. Diversity, equity and inclusiveness must be the root and the foundation for designing, building, and maintaining an excellent school.
2. Strong community schools are designed and formed in partnership with the community, families, and scholars to be served.
3. Policies, rules, and practices of schools must attend to the cultural structures and beliefs held by the people accessing the school.
4. All school participants (scholars, teachers, staff and families) can expect a safe and inclusive experience rooted in growth and opportunity.
5. Tapping scholars' unique assets and strengths as learning entry points is critical to success in school, in college, in career, and in life.

Sample Catalyst Newsletter

[Subscribe](#)[Past Issues](#)[Translate ▼](#)

Happy New Year from Catalyst Public Schools! We are so excited for what 2019 holds for us as we continue to work

[Subscribe](#)[Past Issues](#)[Translate ▼](#)

We hope that each of you, and your loved ones, had a peaceful end to 2018 and are anticipating a wonderful new year!



Our website has launched! Please visit us at Catalyst Public Schools or by clicking on the button below!

[Check Out Our Website Here!](#)

[Subscribe](#)[Past Issues](#)[Translate ▼](#)

CORE VALUES

Equity
Leadership
Joy
Courage
Achievement
Wellness



Design Team!

We continue to hold monthly Design Team Meetings where community comes together to create our school model--we've been crafting insights, aims, and beginning to discuss our core values.

All are welcome!

Our next meeting is

**January 14 from 6:00-7:30 p.m. at the
Downtown Bremerton Library**

See you then!

Where we've been.

Since our last update we've continued to engage community members and take

- Meet with Bremerton **Mayor Greg Wheeler** and the Bremerton Superintendent and other staff
- Held service announcements at St. Clair Missionary Baptist Church and at Mt. Zion Missionary Baptist Church
- Attended the Partners in Youth Achievement holiday dinner
- Center for Reinventing Public Education 25th Anniversary Convening
- Presented about the school to the **Kitsap County Commissioners**
- Attended and facilitated conversations at the **Kitsap County Human Right Conference** held at Olympic College
- Canvassed for Catalyst across Bremerton
- Family Outreach at the **Kitsap Immigration Assistance Center** events
- Family Outreach at **Bay Vista Meet and Greet**
- Presented about Catalyst at the **Mesa Rodonda** meeting in Bremerton
- Conducted empathy interviews with Kitsap County students

JOIN US!

Involve yourself.

Meet us for coffee
Lend your expertise
Join our design team, advisory group, or board

Introduce us.

Connect us with friends and family
Like and share us on Facebook
Connect us with other resources

Invest.

Invest your time by volunteering
Help us find our home
Contact us to invest in our work.

We can't wait to work with you! We have a long road ahead of us as we aim to launch our school in the fall of 2020. We can't do it alone, and we don't want to do it without you. Please add your name to the list of people who will walk the road with us as we launch a truly innovative and equitable school for the kids and families of Kitsap county.

Please forward this email to everyone you know who is interested in supporting this effort and encourage them to sign up to receive more updates from Catalyst! Also, if you are interested in talking with us about the school or how you can be involved please email us at info@catalystpublicschools.org.



Happy New Year, Catalyst Design Team!

Hello everyone! We hope that you had a wonderful end to 2018 and that you are excited about what 2019 has to offer. As we counted our holiday blessings, each of you were on the very top of the list.

We so deeply appreciate the dedication that you have shown to supporting the launch of Catalyst and we are thankful for your guidance, advice, and thought partnership.

2019 will hopefully be the year that we receive approval for our school application, find a facility in which to live, and begin building our team of families and staff to bring this school to life.

Thanks again for all you do! There are a few updates below,

P.S. The meeting Tazsje and I had with Mayor Wheeler went very well and he is going to try to stop by the meeting on 1/14 to meet our group!



Next Meeting: Monday, January 14 @ 6 p.m.

Join us for our next meeting at the MLK library in downtown Bremerton (612 5th Street). During our next meeting we will start digging into what a day in the life of a scholar will look like at Catalyst. We will also begin more detailed planning for our visit to Impact Public Schools in Seattle and our community forum. See you then! Mayor Greg Wheeler may stop by to meet the group.

Updates

- Our website is live. Check us out at www.catalystpublicschools.org and let me know if you have any suggestions on improving the site!



- As we discussed at our last meeting, Tazskeh and I met with Mayor Greg Wheeler and Bremerton Superintendent Aaron Leavell just before the holidays. Both meetings went well and I will provide updates at the next design team meeting.



We recently found out about a great leadership opportunity for anyone interested in learning more about charter school leadership in Washington State. If you are interested take a look via this [link and look at the Aspiring Leaders Fellowship](#). This program comes with a \$2500 stipend for participation. I will share more information at the Design Team meeting.

**The Life Cycle of an Organizing Campaign
(leveraged to foster parent leadership at Catalyst: Bremerton)**

At Catalyst we leverage the principles of community organizing to foster leadership in parents, families, and other community members. Each year, members of the Catalyst CAC will identify a community issue about which they are passionate and then will complete a community-organizing cycle of action to spark change related to that issue. By investing in the leadership development of our families we support the creation of positive community change beyond the walls of our school and foster the civic engagement of scholars and families.

LIFE CYCLE OF AN ORGANIZING CAMPAIGN

A core value in community organizing is **intentionality**: the idea that every step is purposeful and connected to larger goals of building power to change systems. The **Lifecycle of an Organizing Campaign** is a tool for organizers and leaders to see the steps in pulling together a successful campaign. At first glance, it may seem like a lot of work (it often is!). The purpose of this tool is for people to see that each step in their organizing is connected to future steps.

USING THE LIFECYCLE

1. It is a cycle, not a straight line

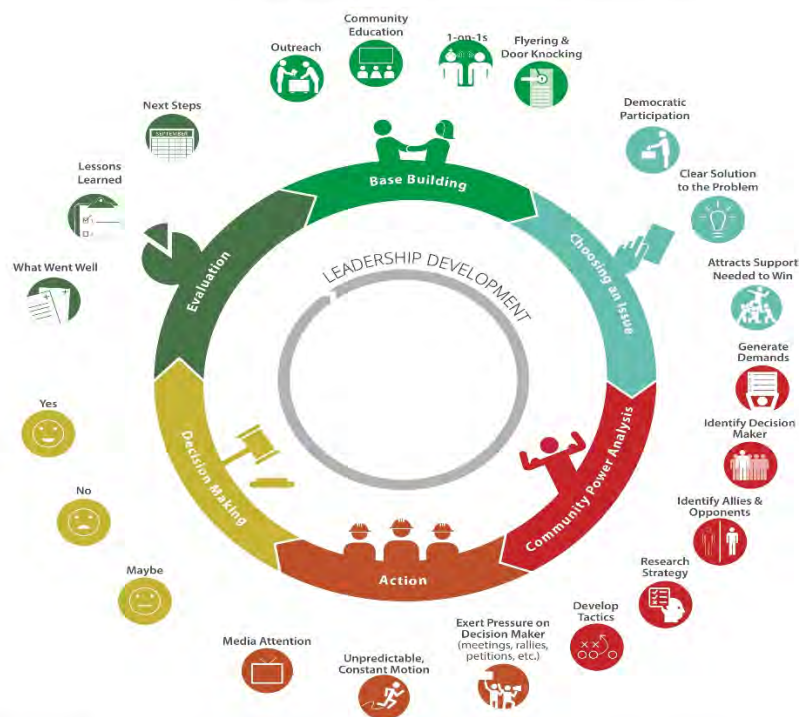
You can never have too many people in your base. No single issue will end injustice or change a system completely. Power Analysis should adapt to changing organizing and political realities. No decision is final. Evaluation never ends.

2. Momentum is critical, avoid short cuts

To keep people involved, don't let the campaign become stagnant, but skipping phases or moving too quickly can be harmful. For example, a group can do a really thorough analysis of an issue, but if that issue isn't a priority to the base, then the issue won't attract the support necessary to win. Alternatively, one can build a large base, but if there is no action, power and change will be limited.

3. Leadership is everything

Being clear about how you develop community leadership throughout the campaign is arguably just as important (if not more important) than the outcome of the campaign itself. Victories will need to be defended, and new issues are sure to arise. Having strong leadership in your community will position you well for future campaigns.



KEY TERMS

Base Building

The process of organizing people by building relationships based on shared interests.

Issue

A solution to shared problem that has a clear target (decision maker) and demand.

Power Analysis

Strategy designed to understand and built power around a particular issue in order to achieve victory.

Action

Use of various tactics (phone calls, letters, rallies, press conferences, etc) by the base to put pressure on the target.

Decision Making

Process of deliberation and negotiation between your base and a particular target related that leads to a "final" decision.

Evaluation

Capturing lessons, tensions and gut reactions to the outcome of a campaign. Evaluation shouldn't only happen at the "end" of a campaign, but constantly throughout the campaign, focusing on what went well, what to improve and next steps.

**Timeline and Ways to Engage: School Design and Launch
For Catalyst Board Members + Design Team**

January 2019	February 2019	March 2019	April 2019	May 2019	June 2019
Finalize application Board Docs due	Feedback and Review	Submit application	Forum Outreach and Engagement	Design Team Meeting	Petition Approved
Forum Outreach and Engagement	Forum Outreach and Engagement	Forum Outreach and Engagement	Community Forum in Bremerton (April 22-26)		Design Team Meeting
Canvassing	Canvassing	Canvassing			Summer Celebration/Potluck
Design Team Meeting	Design Team Meeting	Design Team Meeting	Capacity Hearing with Commission (April 16-17)		
Board Cultivation	Board Cultivation	Board Cultivation-- goal 7 members	Design Team Meeting		

Other Areas of Focus:

Communications:	Fundraising:	Student Recruitment	Operations:	501(c)3 Status for CMO	Marketing
<ul style="list-style-type: none"> Facebook Website Communications Strategy 	<ul style="list-style-type: none"> NSVF Invent Kick Start Campaign CSGF 		<ul style="list-style-type: none"> Budget 5-year forecast Staffing models Procurement 	<ul style="list-style-type: none"> Bank accounts Incorporation 	

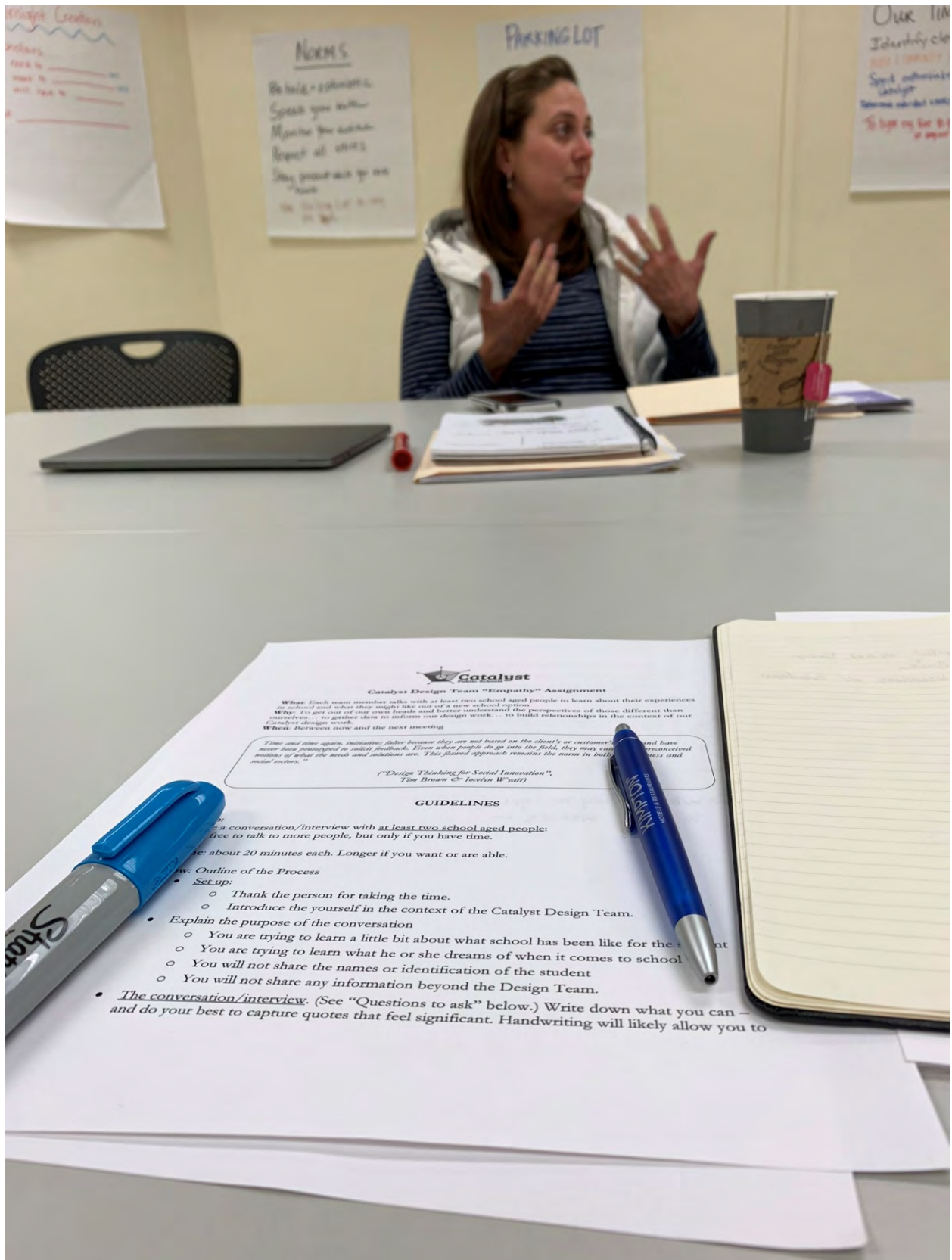
After June 2019

1. July 2019: Pop-Up Summer Camp for Scholars (pending funding)
 - a. Volunteer to work at the camp
 - b. Help build out curriculum to be used at camp
 - c. Help secure resources to make camp a success
 - d. Help create a video/social media about the camp
 - e. Help find a location for camp, support scholar enrollment
2. Throughout 2019—Facility
 - a. Participate in walk-throughs of potential facilities
 - b. Attend meetings with city planner/Mayor to learn about zoning
 - c. Attend public meetings to gain support for any zoning changes needed
 - d. Support facilities search

3. Fundraising for Start-Up Funds and Facility
 - a. Be willing to write a testimonial to support our case for change
 - b. Attend meetings with potential funders
 - c. Help us determine fundraising give/get goals for the year
4. Hiring
 - a. Community Engagement Coordinator--by June 2019
 - b. Office Manager—TBD based on fundraising
 - c. Director of Finance and Operations--TBD based on fundraising
 - d. Engage by
 - i. Helping us recruit talent
 - ii. Participating in interviews and other hiring activities
 - iii. Volunteer time to attend hiring fairs with school co-founders
5. Begin enrolling students and families
 - a. Participate in community canvassing events
 - b. Host an open house meeting at your home or church
 - c. Help distribute flyers, as needed
 - d. Write an op-ed for the Kitsap Sun about Catalyst

Photos from Catalyst Community Events and Design Team Meetings



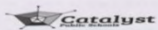


Project Location
Address:
Room #:
Date:
Time:
With: _____

NORMS
Be kind + respectful
Speak your truth
Respect the silence
Respect all voices
Stay present with your work
Use the Parking Lot to stay on track

PARKING LOT

Our TIN
Identify the
BIG I (Impact)
Small authentic
language
Remember: our goal is to
be heard by the 10% of people



Catalyst Design Team "Empathy" Assignment

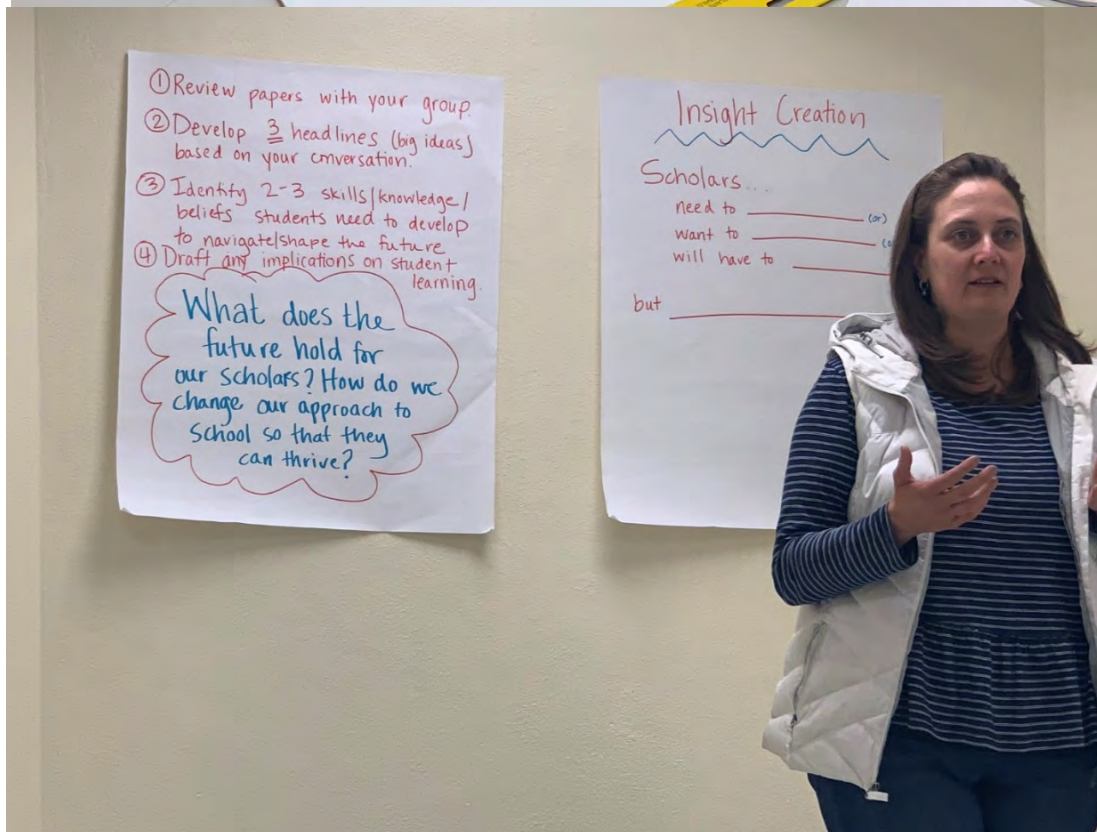
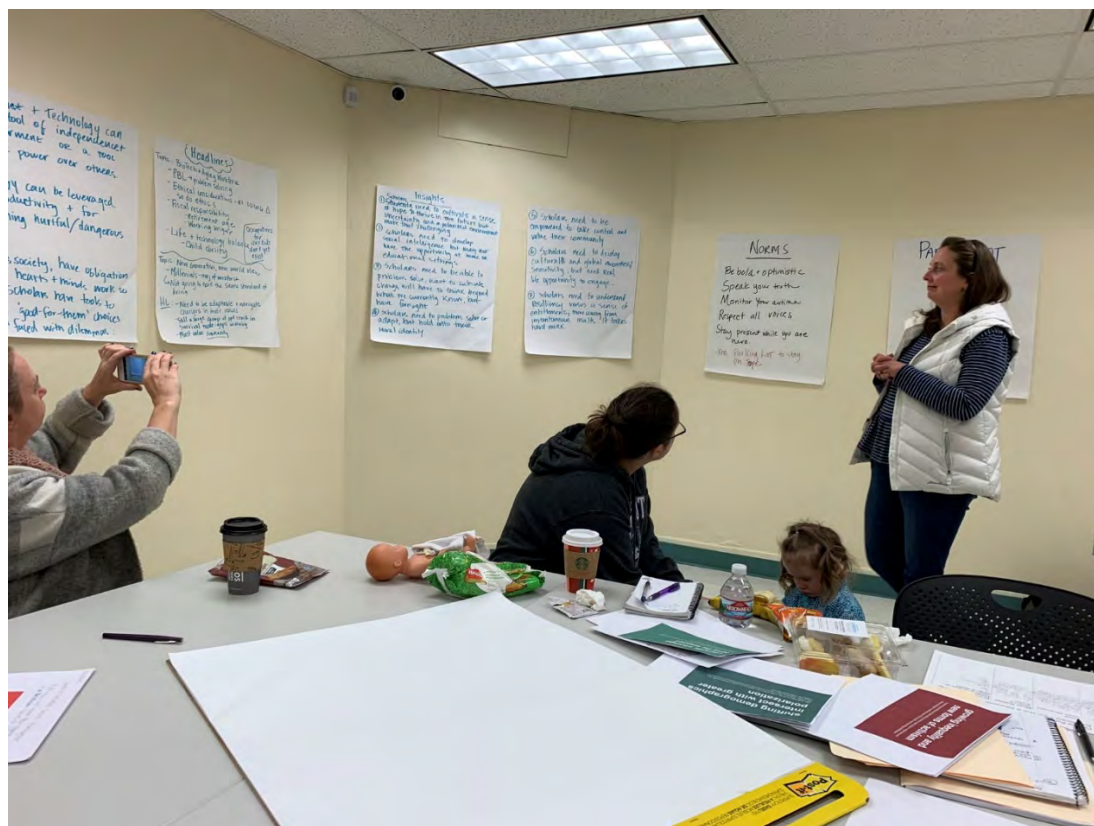
What: Each team member talks with at least two school aged people to learn about their experiences as a student and what they might like out of a new school option.
Why: To get out of our own heads and better understand the perspectives of those different than ourselves... to gather data to inform our design work... to build relationships in the context of our Catalyst design work.
When: Between now and the next meeting

Time and time again, facilitators fail because they are not based on the client's or customer's needs and have never been prompted to solicit feedback. Even when people do go into the field, they may experience preconceived notions of what the needs and solutions are. This flawed approach remains the norm in both business and social sectors.
(*"Design Thinking for Social Innovation",
Tim Brown & Jocelyn W' Pratt*)

GUIDELINES

- Have a conversation/interview with at least two school aged people:
 - Free to talk to more people, but only if you have time.
 - Limit to about 20 minutes each. Longer if you want or are able.
- **Outline of the Process**
 - **Set up:**
 - Thank the person for taking the time.
 - Introduce the yourself in the context of the Catalyst Design Team.
 - **Explain the purpose of the conversation**
 - You are trying to learn a little bit about what school has been like for the student
 - You are trying to learn what he or she dreams of when it comes to school
 - You will not share the names or identification of the student
 - You will not share any information beyond the Design Team.
 - **The conversation/interview.** (See "Questions to ask" below.) Write down what you can – and do your best to capture quotes that feel significant. Handwriting will likely allow you to





- ① Review papers with your group.
- ② Develop 3 headlines (big ideas) based on your conversation.
- ③ Identify 2-3 skills/knowledge/beliefs students need to develop to navigate/shape the future
- ④ Draft any implications on student learning.

What does the future hold for our scholars? How do we change our approach to School so that they can thrive?



{Headlines}

Topic: BioTech + Aging Workforce

- PBL → problem solving
- Ethical considerations - as science Δ so do ethics
- Fiscal responsibility
 - Retirement age
 - Working longer
- Life + technology balance
 - Child obesity

Occupations
for
our kids
don't yet
exist

Topic: New Generation, new world view

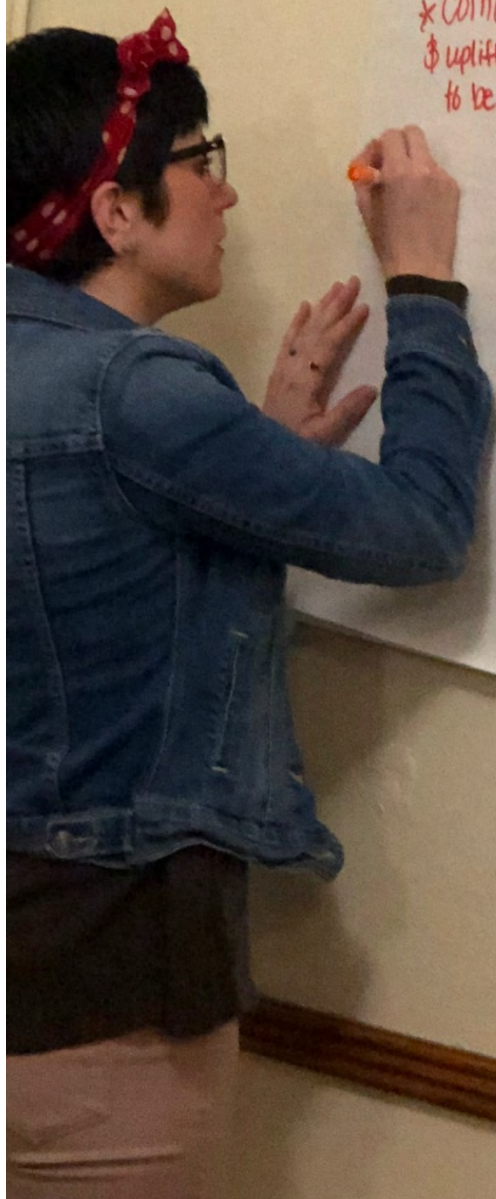
- Millennials - maj of workforce
- ↳ Not going to have the same standard of living

HL : - Need to be adaptable + navigate changes in their values

- Still a large group of ppl stuck in survival mode - gaps widening
- Must value community

HOPES FOR MY COMMUNITY

* coming together
\$ uplifting each other
to be successful.



Scholars Insights

- ① Students need to cultivate a sense of hope to thrive in the future but uncertainty and a polarized environment make that challenging.
- ② Scholars need to develop social intelligence but may not have the opportunity at home or educational settings
- ③ Scholars need to be able to problem solve, want to cultivate change, will have to think beyond what we currently know, but have foresight
- ④ scholars need to problem solve adapt, but hold onto their moral identity

① Internet + Technology can be a tool of independence + empowerment OR a tool to take power over others.

② Technology can be leveraged for productivity + for something hurtful/dangerous

③ We, as society, have obligation to do hearts + minds work so our scholars have tools to make 'good-for-them' choices when faced with dilemmas:

⑤ Scholars need to be empowered to take control and value their community

⑥ Scholars need to develop cultural~~l~~ and global awareness sensitivity, but need real life opportunity to engage.

⑦ Scholars need to understand Resiliency versus a sense of entitlement; move away from instantaneous results. It takes hard work.





Topic: Automation + Future

(HL)

- Shift in educational thinking.
Thinking outside the box
- Flexibility in education jobs/
- finding ways to keep
face to face interactions

Topic: Climate Change

- Making sure scholars
understand/develop a
global perspective
- Understanding waste/responsible
use of resources.







Catalyst: Bremerton

Section 4: Attachment 3

Contents:

- Sample Course Scope and Sequence, Grades K-5, Mathematics
- Sample Course Scope and Sequence, Grades 6-8, Mathematics



A Story of Units: A Curriculum Overview for Grades P-5

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Introduction

This document provides an overview of the academic year for Pre-Kindergarten through Grade 5, beginning with a curriculum map and followed by detailed grade-level descriptions.

The curriculum map is a chart that shows, at a glance, the sequence of modules comprising each grade of the entire elementary curriculum. The map also indicates the approximate number of instructional days designated for each module of each grade. The date approximations are based on an academic calendar beginning on 9/6/12 and ending on 6/26/13 with a testing date approximately mid-late April. Details that elaborate on the curriculum map are found in the grade-level descriptions. Each grade-level description begins with a list of the five to seven modules that comprise the instruction of that grade. That introductory component is followed by three sections: the **Summary of Year**, the **Rationale for Module Sequence**, and the **Alignment Chart** with the grade-level standards. The **Summary of Year** portion of each grade level includes four pieces of information:

- The critical instructional areas for the grade, as described in the Common Core Learning Standards¹ (CCLS)
- The Key Areas of Focus² for the grade band (Note that this information is not available for Pre-Kindergarten.)
- The Required Fluencies³ for the grade (Note that this information is not available for Pre-Kindergarten.)
- The CCLS Major Emphasis Clusters⁴ for the grade (Note that this information is not available for Pre-Kindergarten.)

The **Rationale for Module Sequence** portion of each grade level provides a brief description of the instructional focus of each module for that grade and explains the developmental sequence of the mathematics.

The **Alignment Chart** for each grade lists the CCLS that are addressed in each module of the grade. Throughout the alignment charts, when a cluster is included without a footnote, it is taught in its entirety; there are also times when footnotes are relevant to particular standards within a cluster. All standards for each grade have been carefully included in the module sequence. Some standards are deliberately included in more than one module, so that a strong foundation can be built over time. Note that for Grade 3 through Grade 5, the standards identified on the Pre-Post Standards⁵ document as those which should be taught after the state test in April, have been intentionally aligned with the final modules of those grades.

¹ EngageNY: http://www.p12.nysed.gov/ciai/common_core_standards/pdfdocs/nysp12cclsmath.pdf

² Achievethecore: http://www.achievethecore.org/downloads/E0702_Description_of_the_Common_Core_Shifts.pdf

³ EngageNY: <http://engageNY.org/wp-content/uploads/2011/07/CCSSFluencies.pdf>

⁴ EngageNY: <http://engageNY.org/wp-content/uploads/2012/03/nys-math-emphases-k-8.pdf>

⁵ NYSED: <http://www.p12.nysed.gov/assessment/ei/2013/draft-math-ccls-13.pdf>

	Pre-Kindergarten	Kindergarten	Grade 1	Grade 2	Grade 3	Grade 4	Grade 5	
20 days	M1: Numbers to 5 (45 days)	M1: Numbers to 10 (43 days)	M1: Sums and Differences to 10 (45 days)	M1: Sums and Differences to 20 (10 days)	M1: Properties of Multiplication and Division and Solving Problems with Units of 2-5 and 10 (25 days)	M1: Place Value, Rounding, and Algorithms for Addition and Subtraction (25 days)	M1: Place Value and Decimal Fractions (20 days)	20 days
20 days				M2: Addition and Subtraction of Length Units (12 days)				20 days
20 days	M2: Two-Dimensional and Three-Dimensional Shapes (15 days)	*M2: 2D and 3D Shapes (12 days)	M2: Introduction to Place Value Through Addition and Subtraction Within 20 (35 days)	M3: Place Value, Counting, and Comparison of Numbers to 1000 (25 days)	M2: Place Value and Problem Solving with Units of Measure (25 days)	*M2: Unit Conversions (7 days)	M2: Multi-Digit Whole Number and Decimal Fraction Operations (35 days)	20 days
20 days				M4: Addition and Subtraction Within 200 with Word Problems to 100 (35 days)				20 days
20 days	M3: Counting to Answer Questions of How Many (50 days)	M3: Comparison of Length, Weight, Capacity, and Numbers to 10 (38 days)	M3: Ordering and Comparing Length Measurements as Numbers (15 days)	M5: Addition and Subtraction Within 1000 with Word Problems to 100 (24 days)	M3: Multiplication and Division with Units of 0, 1, 6-9, and Multiples of 10 (25 days)	M3: Multi-Digit Multiplication and Division (43 days)	M3: Addition and Subtraction of Fractions (22 days)	20 days
20 days								20 days
20 days	M4: Comparison of Length, Weight, and Capacity (35 days)	M4: Number Pairs, Addition and Subtraction to 10 (47 days)	M4: Place Value, Comparison, Addition and Subtraction to 40 (35 days)	M6: Foundations of Multiplication and Division (24 days)	M4: Multiplication and Area (20 days)	M4: Angle Measure and Plane Figures (20 days)	M4: Multiplication and Division of Fractions and Decimal Fractions (38 days)	20 days
20 days								20 days
20 days	M5: Numerals to 5, Addition and Subtraction Stories, Counting to 20 (35 days)	M5: Numbers 10-20 and Counting to 100 (30 days)	M5: Identifying, Composing, and Partitioning Shapes (15 days)	M7: Problem Solving with Length, Money, and Data (30 days)	M5: Fractions as Numbers on the Number Line (35 days)	M5: Fraction Equivalence, Ordering, and Operations (45 days)	M5: Addition and Multiplication with Volume and Area (25 days)	20 days
20 days								20 days
20 days	M6: Analyzing, Comparing, and Composing Shapes (10 days)	M6: Place Value, Comparison, Addition and Subtraction to 100 (35 days)	M6: Time, Shapes, and Fractions as Equal Parts of Shapes (20 days)	M8: Time, Shapes, and Fractions as Equal Parts of Shapes (20 days)	M6: Collecting and Displaying Data (10 days)	M6: Decimal Fractions (20 days)	M6: Problem Solving with the Coordinate Plane (40 days)	20 days
20 days								20 days
20 days	M7: Exploring Multiplication (20 days)	M7: Geometry and Measurement Word Problems (40 days)	M7: Geometry and Measurement Word Problems (40 days)	M7: Geometry and Measurement Word Problems (40 days)	M7: Geometry and Measurement Word Problems (40 days)	M7: Exploring Multiplication (20 days)	M7: Exploring Multiplication (20 days)	20 days
20 days								20 days

Approx. test date for grades 3-5

*Please refer to grade-level descriptions to identify partially labeled modules and the standards corresponding to all modules.

Key:	Geometry	Number	Number and Geometry, Measurement	Fractions
------	----------	--------	----------------------------------	-----------

Sequence of Pre-Kindergarten Modules Aligned with the Standards

Module 1: Numbers to 5

Module 2: Two-Dimensional and Three-Dimensional Shapes

Module 3: Counting to Answer Questions of How Many

Module 4: Comparison of Length, Weight, and Capacity

Module 5: Numerals to 5, Addition and Subtraction Stories, Counting to 20

Summary of Year

Pre-Kindergarten mathematics is about (1) developing an understanding of whole numbers using concrete materials, including concepts of correspondence, counting, cardinality, and comparison; and (2) describing shapes in their environment. More learning time in Pre-Kindergarten should be devoted to developing the concept of number than to other topics.

Rationale for Module Sequence in Pre-Kindergarten

Students enter Pre-Kindergarten and find a well-planned, sequential math program awaiting, one that is embedded with hands-on, playful, interactive, largely concrete experiences. Students are encouraged to use their math words to communicate their observations.

The first step, done in Module 1, is to analyze, sort, classify, and count up to 5 with meaning. In Module 2, students practice their numbers up-to-five fluency as they encounter and engage with circles, rectangles, squares, and triangles in their environment. With numbers to 5 understood, work begins in Module 3 on extending “How Many” questions up to 10. The key here is to build from 5, using their fingers to support this perspective.

- 6 is 5 and 1
- 7 is 5 and 2
- 8 is 5 and 3, etc.



Thus, numbers 6–10 are 5 together with numbers 1–5, making the numbers to 10 familiar and manageable. In Module 4, students measure length, weight, and capacity, developing their word bank to include the language of comparison: “small, big, short and tall (length), heavy and light (weight),

empty and full (capacity), while continuing to practice fluency with numbers to 10. With numbers 1–10 still developing, counting to 20 begins while addition and subtraction are initiated within classroom stories and playful contexts in Module 5.

Alignment Chart

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Pre-Kindergarten Modules ⁶
Module 1: Numbers to 5⁷ (45 days)	<p>Know number names and the count sequence.</p> <p>PK.CC.1 Count to 20.</p> <p>PK.CC.2 Represent a number of objects with a written numeral 0–5 (with 0 representing a count of no objects).</p> <p>Count to tell the number of objects.⁸</p> <p>PK.CC.3 Understand the relationship between numbers and quantities to 10; connect counting to cardinality.</p> <ol style="list-style-type: none"> When counting objects, say the number names in the standard order, pairing each object with one and only one number name and each number name with one and only one object. Understand that the last number name said tells the number of objects counted. The number of objects is the same regardless of their arrangement or the order in which they were counted. Understand that each successive number name refers to a quantity that is one larger. <p>PK.CC.4 Count to answer “how many?” questions about as many as 10 things arranged in a line, a rectangular array, or a circle, or as many as 5 things in a scattered configuration; given a number from 1–10, count out that many objects.</p>

⁶ When a cluster is referred to in this chart without a footnote, the cluster is taught in its entirety.

⁷ In this module, standards work is limited to within 5.

⁸ Within 5.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Pre-Kindergarten Modules ⁶
	<p>Compare numbers.⁹</p> <p>PK.CC.5 Identify whether the number of objects in one group is more, less, greater than, fewer, and/or equal to the number of objects in another group, e.g., by using matching and counting strategies.</p> <p>Understand simple patterns.</p> <p>PK.OA.2 Duplicate and extend (e.g., What comes next?) simple patterns using concrete objects.</p> <p>Sort objects and count the number of objects in each category.¹⁰</p> <p>PK.MD.2 Sort objects into categories; count the numbers of objects in each category.</p>
<p>Module 2: Two-Dimensional and Three-Dimensional Shapes (15 days)</p>	<p>Sort objects and count the number of objects in each category.</p> <p>PK.MD.2 Sort objects into categories; count the numbers of objects in each category. (Limit category counts to be less than or equal to 10.)</p> <p>Identify and describe shapes (squares, circles, triangles, rectangles).</p> <p>PK.G.1 Describe objects in the environment using names of shapes, and describe the relative positions of these objects using terms such as top, bottom, up, down, in front of, behind, over, under, and next to.</p> <p>PK.G.2 Correctly name shapes regardless of size.</p> <p>Analyze, compare, and sort objects.</p> <p>PK.G.3 Analyze, compare, and sort two- and three-dimensional shapes and objects, in different sizes, using informal language to describe their similarities, differences, and other attributes (e.g., color, size, and shape).</p> <p>PK.G.4 Create and build shapes from components (e.g., sticks and clay balls).</p>

⁹ The balance of this cluster is addressed in Modules 3 and 4.

¹⁰ Within 5.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Pre-Kindergarten Modules ⁶
Module 3: Counting to Answer Questions of How Many (50 days)	<p>Count to tell the number of objects.</p> <p>PK.CC.3 Understand the relationship between numbers and quantities to 10; connect counting to cardinality.</p> <ol style="list-style-type: none"> When counting objects, say the number names in the standard order, pairing each object with one and only one number name and each number name with one and only one object. Understand that the last number name said tells the number of objects counted. The number of objects is the same regardless of their arrangement or the order in which they were counted. Understand that each successive number name refers to a quantity that is one larger. <p>PK.CC.4 Count to answer “how many?” questions about as many as 10 things arranged in a line, a rectangular array, or a circle, or as many as 5 things in a scattered configuration; given a number from 1–10, count out that many objects.</p> <p>Compare numbers.¹¹</p> <p>PK.CC.5 Identify whether the number of objects in one group is more, less, greater than, fewer, and/or equal to the number of objects in another group, e.g., by using matching and counting strategies.</p> <p>PK.CC.6 Identify “first” and “last” related to order or position.</p> <p>Sort objects and count the number of objects in each category.</p> <p>PK.MD.2 Sort objects into categories; count the numbers of objects in each category. (Limit category counts to be less than or equal to 10.)</p>
Module 4: Comparison of Length, Weight, and Capacity (35 days)	<p>Compare numbers.</p> <p>PK.CC.5 Identify whether the number of objects in one group is more, less, greater than, fewer, and/or equal to the number of objects in another group, e.g., by using matching and counting strategies.</p>

¹¹ PK. CC. 5 focuses here on “more,” “less” and “equal to.” “Than” is excluded and introduced in the context of measurement in Module 4.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Pre-Kindergarten Modules ⁶
	<p>PK.CC.6 Identify “first” and “last” related to order or position.</p> <p>Describe and compare measurable attributes.</p> <p>PK.MD.1 Identify measurable attributes of objects, such as length, and weight. Describe them using correct vocabulary (e.g., small, big, short, tall, empty, full, heavy, and light).</p>
<p>Module 5: Numerals to 5, Addition and Subtraction Stories, Counting to 20 (35 days)</p>	<p>Know number names and the count sequence.</p> <p>PK.CC.1 Count to 20.</p> <p>PK.CC.2 Represent a number of objects with a written numeral 0–5 (with 0 representing a count of no objects).</p> <p>Understand addition as adding to, and understand subtraction as taking from.</p> <p>PK.OA.1 Demonstrate an understanding of addition and subtraction by using objects, fingers, and responding to practical situations (e.g., If we have 3 apples and add two more, how many apples do we have all together?).</p> <p>Understand simple patterns.</p> <p>PK.OA.2 Duplicate and extend (e.g., What comes next?) simple patterns using concrete objects.</p>

Sequence of Kindergarten Modules Aligned with the Standards

Module 1: Numbers to 10

Module 2: Two-Dimensional and Three-Dimensional Shapes

Module 3: Comparison of Length, Weight, Capacity, and Numbers to 10

Module 4: Number Pairs, Addition and Subtraction to 10

Module 5: Numbers 10–20 and Counting to 100

Module 6: Analyzing, Comparing, and Composing Shapes

Summary of Year

Kindergarten mathematics is about (1) representing, relating, and operating on whole numbers, initially with sets of objects; and (2) describing shapes and space. More learning time in Kindergarten should be devoted to number than to other topics.

Key Areas of Focus for K-2: Addition and subtraction—concepts, skills, and problem solving

Required Fluency: K.OA.5 Add and subtract within 5.

CCLS Major Emphasis Clusters

Counting and Cardinality

- Know number names and count sequence.
- Count to tell the number of objects.
- Compare numbers.

Operations and Algebraic Thinking

- Understand addition as putting together and adding to, and understand subtraction as taking apart and taking from.

Number and Operations in Base Ten

- Work with numbers 11-19 to gain foundations for place value.

Rationale for Module Sequence in Kindergarten

Like Pre-Kindergarten, in Module 1, Kindergarten starts out with solidifying the meaning of numbers to 10 with a focus on embedded numbers and relationships to 5 using fingers, cubes, drawings, 5 groups and the Rekenrek. Students then investigate patterns of “1 more” and “1 less” using models such as the number stairs (see picture). Because fluency with addition and subtraction within 5 is a Kindergarten goal, addition within 5 is begun in Module 1 as another representation of the decomposition of numbers.



Number Stairs

In Module 2, Students learn to identify and describe squares, circles, triangles, rectangles, hexagons, cubes, cones, cylinders and spheres. During this module students also practice their fluency with numbers to 10.

In Module 3, students begin to experiment with comparison of length, weight and capacity. Students first learn to identify the attribute being compared, moving away from non-specific language such as “bigger” to “longer than,” “heavier than,” or “more than.” Comparison begins with developing the meaning of the word “than” in the context of “taller than,” “shorter than,” “heavier than,” “longer than,” etc. The terms “more” and “less” become increasingly abstract later in Kindergarten. “7 is 2 more than 5” is more abstract than “Jim is taller than John.”

In Module 4, number comparison leads to a further study of embedded numbers (e.g., “3 is less than 7” leads to, “3 and 4 make 7,” and $3 + 4 = 7$),. “1 more, 2 more, 3 more” lead into addition (+1, +2, +3). Students now represent stories with blocks, drawings, and equations.

After Module 5, after students have a meaningful experience of addition and subtraction within 10 in Module 4, they progress to exploration of numbers 10-20. They apply their skill with and understanding of numbers within 10 to teen numbers, which are decomposed as “10 ones and some ones.” For example, “12 is 2 more than 10.” The number 10 is special; it is the anchor that will eventually become the “ten” unit in the place value system in Grade 1.

Module 6 rounds out the year with an exploration of shapes. Students build shapes from components, analyze and compare them, and discover that they can be composed of smaller shapes, just as larger numbers are composed of smaller numbers.

Alignment Chart

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Kindergarten Modules ¹²
Module 1: Numbers to 10¹³ (43 days)	<p>Know number names and the count sequence.¹⁴</p> <p>K.CC.3 Write numbers from 0 to 20. Represent a number of objects with a written numeral 0-20 (with 0 representing a count of no objects).</p> <p>Count to tell the number of objects.¹⁵</p> <p>K.CC.4 Understand the relationship between numbers and quantities; connect counting to cardinality.</p> <ol style="list-style-type: none"> When counting objects, say the number names in the standard order, pairing each object with one and only one number name and each number name with one and only one object. Understand that the last number name said tells the number of objects counted. The number of objects is the same regardless of their arrangement or the order in which they were counted. Understand that each successive number name refers to a quantity that is one larger. <p>K.CC.5 Count to answer “how many?” questions about as many as 20 things arranged in a line, a rectangular array, or a circle, or as many as 10 things in a scattered configuration; given a number from 1-20, count out that many objects.</p> <p>Understand addition as putting together and adding to, and understand subtraction as taking apart and taking from.¹⁶</p> <p>K.OA.3 Decompose numbers less than or equal to 10 into pairs in more than one way, e.g., by using objects or drawings, and record each decomposition by a drawing or equation (e.g., $5 = 2 + 3$ and $5 = 4 + 1$).</p>

¹² When a cluster is referred to in this chart without a footnote, the cluster is taught in its entirety.

¹³ In this module, standards work is limited to within 10.

¹⁴ The balance of this cluster is addressed in Module 5.

¹⁵ K.CC.4d is addressed in Module 6.

¹⁶ The balance of this cluster is addressed in Module 4.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Kindergarten Modules ¹²
	<p>Classify objects and count the number of objects in each category.</p> <p>K.MD.3 Classify objects into given categories; count the numbers of objects in each category and sort the categories by count. (Limit category counts to be less than or equal to 10.)</p>
<p>Module 2: Two-Dimensional and Three-Dimensional Shapes (12 days)</p>	<p>Classify objects and count the number of objects in each category.</p> <p>K.MD.3 Classify objects into given categories; count the numbers of objects in each category and sort the categories by count. (Limit category counts to be less than or equal to 10.)</p> <p>Identify and describe shapes (squares, circles, triangles, rectangles, hexagons, cubes, cones, cylinders, and spheres).</p> <p>K.G.1 Describe objects in the environment using names of shapes, and describe the relative positions of these objects using terms such as <i>above</i>, <i>below</i>, <i>beside</i>, <i>in front of</i>, <i>behind</i>, and <i>next to</i>.</p> <p>K.G.2 Correctly name shapes regardless of their orientations or overall size.</p> <p>K.G.3 Identify shapes as two-dimensional (lying in a plane, “flat”) or three-dimensional (“solid”).</p> <p>Analyze, compare, create, and compose shapes.¹⁷</p> <p>K.G.4 Analyze and compare two- and three-dimensional shapes, in different sizes and orientations, using informal language to describe their similarities, differences, parts (e.g., number of sides and vertices/“corners”) and other attributes (e.g., having sides of equal length).</p>
<p>Module 3: Comparison of Length, Weight, Capacity, and Numbers to 10 (38 days)</p>	<p>Compare numbers.</p> <p>K.CC.6 Identify whether the number of objects in one group is greater than, less than, or equal to the number of objects in another group, e.g., by using matching and counting strategies. (Include groups with up to ten objects.)</p> <p>K.CC.7 Compare two numbers between 1 and 10 presented as written numerals. Describe and compare measurable attributes.</p>

¹⁷ The balance of this cluster is addressed in Module 6.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Kindergarten Modules ¹²
	<p>K.MD.1 Describe measurable attributes of objects, such as length or weight. Describe several measurable attributes of a single object.</p> <p>K.MD.2 Directly compare two objects with a measurable attribute in common, to see which object has “more of”/“less of” the attribute, and describe the difference. <i>For example, directly compare the heights of two children and describe one child as taller/shorter.</i></p>
Module 4: Number Pairs, Addition and Subtraction to 10 (47 days)	<p>Understand addition as putting together and adding to, and understand subtraction as taking apart and taking from.</p> <p>K.OA.1 Represent addition and subtraction with objects, fingers, mental images, drawings, sounds (e.g., claps), acting out situations, verbal explanations, expressions, or equations. (Drawings need not show details, but should show the mathematics in the problem.)</p> <p>K.OA.2 Solve addition and subtraction word problems, and add and subtract within 10, e.g., by using objects or drawings to represent the problem.</p> <p>K.OA.3 Decompose numbers less than or equal to 10 into pairs in more than one way, e.g., by using objects or drawings, and record each decomposition by a drawing or equation (e.g., $5 = 2 + 3$ and $5 = 4 + 1$).</p> <p>K.OA.4 For any number from 1 to 9, find the number that makes 10 when added to the given number, e.g., by using objects or drawings and record the answer with a drawing or equation.</p> <p>K.OA.5 Fluently add and subtract within 5.</p>
Module 5: Numbers 10–20 and Counting to 100 (30 days)	<p>Know number names and the count sequence.</p> <p>K.CC.1 Count to 100 by ones and by tens.</p> <p>K.CC.2 Count forward beginning from a given number within the known sequence (instead of having to begin at 1).</p> <p>K.CC.3 Write numbers from 0 to 20. Represent a number of objects with a written numeral 0-20 (with 0 representing a count of no objects).</p>

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Kindergarten Modules ¹²
	<p>Count to tell the number of objects.¹⁸</p> <p>K.CC.4 Understand the relationship between numbers and quantities; connect counting to cardinality.</p> <ol style="list-style-type: none"> When counting objects, say the number names in the standard order, pairing each object with one and only one number name and each number name with one and only one object. Understand that the last number name said tells the number of objects counted. The number of objects is the same regardless of their arrangement or the order in which they were counted. Understand that each successive number name refers to a quantity that is one larger. <p>K.CC.5 Count to answer “how many?” questions about as many as 20 things arranged in a line, a rectangular array, or a circle, or as many as 10 things in a scattered configuration; given a number from 1-20, count out that many objects.</p> <p>Work with numbers 11-19 to gain foundations for place value.</p> <p>K.NBT.1 Compose and decompose numbers from 11 to 19 into ten ones and some further ones, e.g., by using objects or drawings and record each composition or decomposition by a drawing or equation (such as $18 = 10 + 8$); understand that these numbers are composed of ten ones and one, two three, four, five, six, seven, eight or nine ones.</p>
<p>Module 6: Analyzing, Comparing, and Composing Shapes (10 days)</p>	<p>Count to tell the number of things.¹⁹</p> <p>K.CC.4 Understand the relationship between numbers and quantities: connect counting to cardinality.</p> <ol style="list-style-type: none"> Develop understanding of ordinal numbers (first through tenth) to describe the relative position and magnitude of whole numbers. <p>Analyze, compare, create and compose shapes.</p> <p>K.G.4 Analyze and compare two and three dimensional shapes, in different sizes and orientations,</p>

¹⁸ K.CC.4d is addressed in Module 6.

¹⁹ Ordinality is introduced in the context of constructing and manipulating shapes. The balance of this cluster is addressed in Modules 1 and 5.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Kindergarten Modules ¹²
	<p>using informal language to describe their similarities, differences, parts (e.g., number of sides and vertices/“corners”) and other attributes (e.g., having sides of equal length).</p> <p>K.G.5 Model shapes in the world by building shapes from components (e.g., sticks and clay balls) and drawing shapes.</p> <p>K.G.6 Compose simple shapes to form larger shapes. <i>For example, “Can you join these two triangles with full sides touching to make a rectangle?”</i></p>

Sequence of Grade 1 Modules Aligned with the Standards

Module 1: Sums and Differences to 10

Module 2: Introduction to Place Value Through Addition and Subtraction Within 20

Module 3: Ordering and Comparing Length Measurements as Numbers

Module 4: Place Value, Comparison, Addition and Subtraction to 40

Module 5: Identifying, Composing, and Partitioning Shapes

Module 6: Place Value, Comparison, Addition and Subtraction to 100

Summary of Year

First Grade mathematics is about (1) developing understanding of addition, subtraction, and strategies for addition and subtraction within 20; (2) developing understanding of whole number relationships and place value, including grouping in tens and ones; (3) developing understanding of linear measurement and measuring lengths as iterating length units; and (4) reasoning about attributes of, and composing and decomposing geometric shapes.

Key Areas of Focus for K-2: Addition and subtraction—concepts, skills, and problem solving

Required Fluency: 1.OA.6 Add and subtract within 10.

CCLS Major Emphasis Clusters

Operations and Algebraic Thinking

- Represent and solve problems involving addition and subtraction.
- Understand and apply properties of operations and the relationship between addition and subtraction.
- Add and subtract within 20.
- Work with addition and subtraction equations.

Number and Operations in Base Ten

- Extend the counting sequence.
- Understand place value.
- Use place value understanding and properties of operations to add and subtract.

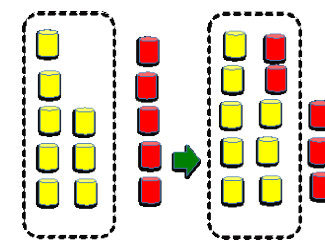
Measurement and Data

- Measure lengths indirectly and by iterating length units.

Rationale for Module Sequence in Grade 1

In Grade 1, work with numbers to 10 continues to be a major stepping-stone in learning the place value system. In Module 1, students work to further understand the meaning of addition and subtraction begun in Kindergarten, largely within the context of the Grade 1 word problem types. They begin intentionally and energetically building fluency with addition and subtraction facts—a major gateway to later grades.

In Module 2, students add and subtract within 20. Work begins by modeling “adding and subtracting across ten” in word problems and with equations. Solutions involving decomposition and composition like that shown to the right for $8 + 5$ reinforce the need to “make 10.” In Module 1, students loosely grouped 10 objects to make a ten. They now transition to conceptualizing that ten as a single unit (using 10 linking cubes stuck together, for example). This is the next major stepping-stone in understanding place value, learning to group “10 ones” as a single unit: 1 ten. Learning to “complete a unit” empowers students in later grades to understand “renaming” in the addition algorithm, to add 298 and 35 mentally (i.e., $298 + 2 + 33$), and to add measurements like 4 m, 80 cm, and 50 cm (i.e., $4 \text{ m} + 80 \text{ cm} + 20 \text{ cm} + 30 \text{ cm} = 4 \text{ m} + 1 \text{ m} + 30 \text{ cm} = 5 \text{ m } 30 \text{ cm}$).



$$8 + 5 = 8 + (2 + 3) = (8 + 2) + 3 = 10 + 3 = 13$$

Adding Across a Ten

Module 3, which focuses on measuring and comparing lengths indirectly and by iterating length units, gives students a few weeks to practice and internalize “making a 10” during daily fluency activities.

Module 4 returns to understanding place value. Addition and subtraction within 40 rest on firmly establishing a “ten” as a unit that can be counted, first introduced at the close of Module 2. Students begin to see a problem like $23 + 6$ as an opportunity separate the “2 tens” in 23 and concentrate on the familiar addition problem $3 + 6$. Adding $8 + 5$ is related to solving $28 + 5$; complete a unit of ten and add 3 more.

In Module 5, students think about attributes of shapes and practice composing and decomposing geometric shapes. They also practice work with addition and subtraction within 40 during daily fluency activities (from Module 4). Thus, this module provides important “internalization time” for students between two intense number-based modules. The module placement also gives more spatially-oriented students the opportunity to build their confidence before they return to arithmetic.

Although Module 6 focuses on “adding and subtracting within 100,” the learning goal differs from the “within 40” module. Here, the new level of complexity is to build off the place value understanding and mental math strategies that were introduced in earlier modules. Students explore by using simple examples and the familiar units of 10 made out of linking cubes, bundles, and drawings. Students also count to 120 and represent any number within that range with a numeral.

Alignment Chart

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 1 Modules ²⁰
Module 1: Sums and Differences to 10 ²¹ (45 days)	<p>Represent and solve problems involving addition and subtraction.²²</p> <p>1.OA.1 Use addition and subtraction within 20 to solve word problems involving situations of adding to, taking from, putting together, taking apart and comparing, with unknowns in all positions, e.g., by using objects, drawings and equations with a symbol for the unknown number to represent the problem. (See Glossary, Table 1.)</p> <p>Understand and apply properties of operations and the relationship between addition and subtraction.</p> <p>1.OA.3 Apply properties of operations as strategies to add and subtract. (Students need not use formal terms for these properties.) <i>Examples: If $8 + 3 = 11$ is known, then $3 + 8 = 11$ is also known. (Commutative property of addition.) To add $2 + 6 + 4$, the second two numbers can be added to make a ten, so $2 + 6 + 4 = 2 + 10 = 12$. (Associative property of addition.)</i></p> <p>1.OA.4 Understand subtraction as an unknown-addend problem. <i>For example, subtract $10 - 8$ by finding the number that makes 10 when added to 8.</i></p> <p>Add and subtract within 20.</p> <p>1.OA.5 Relate counting to addition and subtraction (e.g., by counting on 2 to add 2).</p> <p>1.OA.6 Add and subtract within 20, demonstrating fluency for addition and subtraction within 10. Use strategies such as counting on; making ten (e.g., $8 + 6 = 8 + 2 + 4 = 10 + 4 = 14$); decomposing a number leading to a ten (e.g., $13 - 4 = 13 - 3 - 1 = 10 - 1 = 9$); using the relationship between addition and subtraction (e.g., knowing that $8 + 4 = 12$, one knows $12 - 8 = 4$); and creating equivalent but easier or known sums (e.g., adding $6 + 7$ by creating the known equivalent $6 + 6 + 1 = 12 + 1 = 13$).</p> <p>Work with addition and subtraction equations.</p>

²⁰ When a cluster is referred to in this chart without a footnote, the cluster is taught in its entirety.

²¹ In this module, work is limited to within 10.

²² 1.OA.2 is addressed in Module 2.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 1 Modules ²⁰
	<p>1.OA.7 Understand the meaning of the equal sign, and determine if equations involving addition and subtraction are true or false. <i>For example, which of the following equations are true and which are false? $6 = 6$, $7 = 8 - 1$, $5 + 2 = 2 + 5$, $4 + 1 = 5 + 2$.</i></p> <p>1.OA.8 Determine the unknown whole number in an addition or subtraction equation relating three whole numbers. <i>For example, determine the unknown number that makes the equation true in each of the equations $8 + ? = 11$, $5 = ? - 3$, $6 + 6 = ?$.</i></p>
<p>Module 2: Introduction to Place Value Through Addition and Subtraction Within 20 (35 days)</p>	<p>Represent and solve problems involving addition and subtraction.</p> <p>1.OA.1 Use addition and subtraction within 20 to solve word problems involving situations of adding to, taking from, putting together, taking apart, and comparing, with unknowns in all positions, e.g., by using objects, drawings, and equations with a symbol for the unknown number to represent the problem. (See Glossary, Table 1.)</p> <p>1.OA.2 Solve word problems that call for addition of three whole numbers whose sum is less than or equal to 20, e.g., by using objects, drawings, and equations with a symbol for the unknown number to represent the problem.</p> <p>Understand and apply properties of operations and the relationship between addition and subtraction.</p> <p>1.OA.3 Apply properties of operations as strategies to add and subtract. (Students need not use formal terms for these properties.) <i>Examples: If $8 + 3 = 11$ is known, then $3 + 8 = 11$ is also known. (Commutative property of addition.) To add $2 + 6 + 4$, the second two numbers can be added to make a ten, so $2 + 6 + 4 = 2 + 10 = 12$. (Associative property of addition.)</i></p> <p>1.OA.4 Understand subtraction as an unknown-addend problem. <i>For example, subtract $10 - 8$ by finding the number that makes 10 when added to 8.</i></p> <p>Add and subtract within 20.²⁷</p> <p>1.OA.6 Add and subtract within 20, demonstrating fluency for addition and subtraction within 10. Use strategies such as counting on; making ten (e.g., $8 + 6 = 8 + 2 + 4 = 10 + 4 = 14$); decomposing a</p>

²⁷ The balance of this cluster is addressed in Module 1.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 1 Modules ²⁰
	<p>number leading to a ten (e.g., $13 - 4 = 13 - 3 - 1 = 10 - 1 = 9$); using the relationship between addition and subtraction (e.g., knowing that $8 + 4 = 12$, one knows $12 - 8 = 4$); and creating equivalent but easier or known sums (e.g., adding $6 + 7$ by creating the known equivalent $6 + 6 + 1 = 12 + 1 = 13$).</p> <p>Understand place value.²⁸</p> <p>1.NBT.2 Understand that the two digits of a two-digit number represent amounts of tens and ones. Understand the following as special cases:</p> <ol style="list-style-type: none"> 10 can be thought of as a bundle of ten ones – called a “ten.” The numbers from 11 to 19 are composed of a ten and one, two, three, four, five, six, seven, eight, or nine ones.
<p>Module 3: Ordering and Comparing Length Measurements as Numbers (15 days)</p>	<p>Represent and solve problems involving addition and subtraction.²⁹</p> <p>1.OA.1 Use addition and subtraction within 20 to solve word problems involving situations of adding to, taking from, putting together, taking apart, and comparing, with unknowns in all positions, e.g., by using objects, drawings, and equations with a symbol for the unknown number to represent the problem. (See Glossary, Table 1.)</p> <p>Measure lengths indirectly and by iterating length units.</p> <p>1.MD.1 Order three objects by length; compare the lengths of two objects indirectly by using a third object.</p> <p>1.MD.2 Express the length of an object as a whole number of length units, by laying multiple copies of a shorter object (the length unit) end to end; understand that the length measurement of an object is the number of same-size length units that span it with no gaps or overlaps. <i>Limit to contexts where the object being measured is spanned by a whole number of length units with no gaps or overlaps.</i></p>

²⁸ Focus in this module is on numbers to 20. The balance of this cluster is addressed in Modules 4 and 6.

²⁹ The balance of this cluster is addressed in Module 2.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 1 Modules ²⁰
	<p>Represent and interpret data.</p> <p>1.MD.4 Organize, represent, and interpret data with up to three categories; ask and answer questions about the total number of data points, how many in each category, and how many more or less are in one category than in another.</p>
<p>Module 4: Place Value, Comparison, Addition and Subtraction to 40 (35 days)</p>	<p>Represent and solve problems involving addition and subtraction.³⁰</p> <p>1.OA.1 Use addition and subtraction within 20 to solve word problems involving situations of adding to, taking from, putting together, taking apart, and comparing, with unknowns in all positions, e.g., by using objects, drawings, and equations with a symbol for the unknown number to represent the problem. (See Glossary, Table 1.)</p> <p>Extend the counting sequence.³¹</p> <p>1.NBT.1 Count to 120, starting at any number less than 120. In this range, read and write numerals and represent a number of objects with a written numeral.</p> <p>Understand place value.³²</p> <p>1.NBT.2 Understand that the two digits of a two-digit number represent amounts of tens and ones. Understand the following as special cases:</p> <ol style="list-style-type: none"> 10 can be thought of as a bundle of ten ones – called a “ten.” The numbers 10, 20, 30, 40, 50, 60, 70, 80, 90 refer to one, two, three, four, five, six, seven, eight, or nine tens (and 0 ones). <p>1.NBT.3 Compare two two-digit numbers based on meanings of the tens and ones digits, recording the results of comparisons with the symbols $>$, $=$, and $<$.</p> <p>Use place value understanding and properties of operations to add and subtract.³³</p>

³⁰ The balance of this cluster is addressed in Module 2.

³¹ Focus on numbers to 40.

³² Focus on numbers to 40.

³³ Focus on numbers to 40.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 1 Modules ²⁰
	<p>1.NBT.4 Add within 100, including adding a two-digit number and a one-digit number, and adding a two-digit number and a multiple of 10, using concrete models or drawings and strategies based on place value, properties of operations, and/or the relationship between addition and subtraction; relate the strategy to a written method and explain the reasoning used. Understand that in adding two-digit numbers, one adds tens and tens, ones and ones; and sometimes it is necessary to compose a ten.</p> <p>1.NBT.5 Given a two-digit number, mentally find 10 more or 10 less than the number, without having to count; explain the reasoning used.</p> <p>1.NBT.6 Subtract multiples of 10 in the range 10-90 from multiples of 10 in the range 10-90 (positive or zero differences), using concrete models or drawings and strategies based on place value, properties of operations, and/or the relationship between addition and subtraction; relate the strategy to a written method and explain the reasoning used.</p>
<p>Module 5: Identifying, Composing, and Partitioning Shapes (15 days)</p>	<p>Tell and write time and money.³⁴</p> <p>1.MD.3 Tell and write time in hours and half-hours using analog and digital clocks. Recognize and identify coins, their names, and their value.</p> <p>Reason with shapes and their attributes.</p> <p>1.G.1 Distinguish between defining attributes (e.g., triangles are closed and three-sided) versus non-defining attributes (e.g., color, orientation, overall size); build and draw shapes to possess defining attributes.</p> <p>1.G.2 Compose two-dimensional shapes (rectangles, squares, trapezoids, triangles, half-circles, and quarter-circles) or three-dimensional shapes (cubes, right rectangular prisms, right circular cones, and right circular cylinders) to create a composite shape, and compose new shapes from the composite shape. (Students do not need to learn formal names such as “right rectangular prism.”)</p> <p>1.G.3 Partition circles and rectangles into two and four equal shares, describe the shares using the</p>

³⁴ Focus on time. Coins are addressed in Module 6.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 1 Modules ²⁰
	<p>words <i>halves</i>, <i>fourths</i>, and <i>quarters</i>, and use the phrases <i>half of</i>, <i>fourth of</i>, and <i>quarter of</i>. Describe the whole as two of, or four of the shares. Understand for these examples that decomposing into more equal shares creates smaller shares.</p>
<p>Module 6: Place Value, Comparison, Addition and Subtraction to 100 (35 days)</p>	<p>Extend the counting sequence.</p> <p>1.NBT.1 Count to 120, starting at any number less than 120. In this range, read and write numerals and represent a number of objects with a written numeral.</p> <p>Understand place value.</p> <p>1.NBT.2 Understand that the two digits of a two-digit number represent amounts of tens and ones. Understand the following as special cases:</p> <ul style="list-style-type: none"> a. 10 can be thought of as a bundle of ten ones – called a “ten.” c. The numbers 10, 20, 30, 40, 50, 60, 70, 80, 90 refer to one, two, three, four, five, six, seven, eight, or nine tens (and 0 ones). <p>1.NBT.3 Compare two two-digit numbers based on meanings of the tens and ones digits, recording the results of comparisons with the symbols $>$, $=$, and $<$.</p> <p>Use place value understanding and properties of operations to add and subtract.</p> <p>1.NBT.4 Add within 100, including adding a two-digit number and a one-digit number, and adding a two-digit number and a multiple of 10, using concrete models or drawings and strategies based on place value, properties of operations, and/or the relationship between addition and subtraction; relate the strategy to a written method and explain the reasoning used. Understand that in adding two-digit numbers, one adds tens and tens, ones and ones; and sometimes it is necessary to compose a ten.</p> <p>1.NBT.5 Given a two-digit number, mentally find 10 more or 10 less than the number, without having to count: explain the reasoning used.</p> <p>1.NBT.6 Subtract multiples of 10 in the range 10-90 from multiples of 10 in the range 10-90 (positive or zero differences), using concrete models or drawings and strategies based on place value,</p>

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 1 Modules ²⁰
	<p>properties of operations, and/or the relationship between addition and subtraction; relate the strategy to a written method and explain the reasoning used.</p> <p>Tell and write time and money.³⁵</p> <p>1.MD.3 Tell and write time in hours and half-hours using analog and digital clocks. Recognize and identify coins, their names, and their value.</p>

³⁵ Focus on money.

Sequence of Grade 2 Modules Aligned with the Standards

Module 1: Sums and Differences to 100

Module 2: Addition and Subtraction of Length Units

Module 3: Place Value, Counting, and Comparison of Numbers to 1000

Module 4: Addition and Subtraction Within 200 with Word Problems to 100

Module 5: Addition and Subtraction Within 1000 with Word Problems to 100

Module 6: Foundations of Multiplication and Division

Module 7: Problem Solving with Length, Money, and Data

Module 8: Time, Shapes, and Fractions as Equal Parts of Shapes

Summary of Year

Second Grade mathematics is about (1) extending understanding of base-ten notation; (2) building fluency with addition and subtraction; (3) using standard units of measure; and (4) describing and analyzing shapes.

Key Areas of Focus for K-2: Addition and subtraction—concepts, skills, and problem solving

Required Fluency: 2.OA.2 Add and subtract within 20.
2.NBT.5 Add and subtract within 100.

CCLS Major Emphasis Clusters

Operations and Algebraic Thinking

- Represent and solve problems involving addition and subtraction.
- Add and subtract within 20.
- Work with equal groups of objects to gain foundations for multiplication.

Number and Operations in Base Ten

- Understand place value.
- Use place value understanding and properties of operations to add and subtract.

Measurement and Data

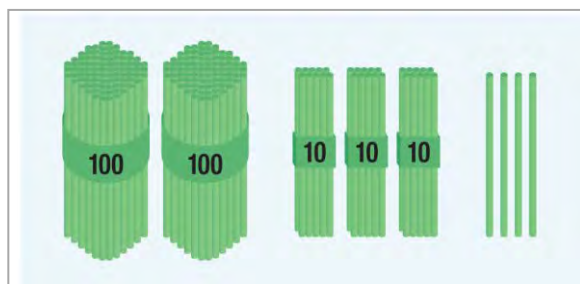
- Measure and estimate lengths in standard units.
- Relate addition and subtraction to length.

Rationale for Module Sequence in Grade 2

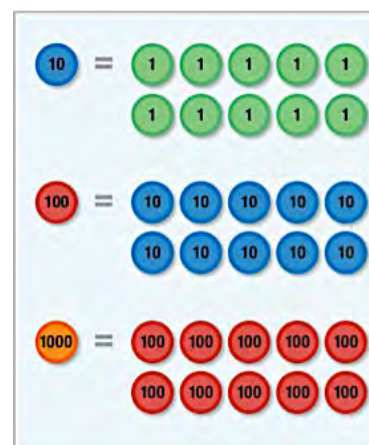
From Grade 1, students have fluency of addition and subtraction within 10 and extensive experience working with numbers to 100. Module 1 of Grade 2 establishes a motivating, differentiated fluency program in the first few weeks that will provide each student with enough practice to achieve mastery of the new required fluencies (i.e., adding and subtracting within 20 and within 100) by the end of the year. Students learn to represent and solve word problems using addition and subtraction: a practice that will also continue throughout the year.

In Module 2, students learn to measure and estimate using standard units for length and solve measurement word problems involving addition and subtraction of length. A major objective is for students to use measurement tools with the understanding that linear measure involves an iteration of units and that the smaller a unit, the more iterations are necessary to cover a given length. Students work exclusively with metric units, i.e. centimeters and meters, in this module to support upcoming work with place value concepts in Module 3. Units also play a central role in the addition and subtraction algorithms of Modules 4 and 5. An underlying goal for this module is for students to learn the meaning of a “unit” in a different context, that of length. This understanding serves as the foundation of arithmetic, measurement, and geometry in elementary school.

All arithmetic algorithms are manipulations of place value units: ones, tens, hundreds, etc. In Module 3, students extend their understanding of base-ten notation and apply their understanding of place value to count and compare numbers to 1000. In Grade 2 the place value units move from a proportional model to a non-proportional number disk model (see picture). The place value table with number disks can be used through Grade 5 for modeling very large numbers and decimals, thus providing students greater facility with and understanding of mental math and algorithms.



Proportional Model for Place Value



Non-Proportional Model for Place Value

In Module 4, students apply their work with place value units to add and subtract within 200 moving from concrete to pictorial to abstract. This work deepens their understanding of base-ten, place value, and the properties of operations. It also challenges them to apply their knowledge to one-step and two-step word problems. During this module, students also continue to develop one of the required fluencies of the grade: addition and subtraction within 100.

Module 5 builds upon the work of Module 4. Students again use place value strategies, manipulatives, and math drawings to extend their conceptual understanding of the addition and subtraction algorithms to numbers within 1000. They maintain addition and subtraction fluency within 100

through daily application work to solve one- and two-step word problems of all types. A key component of Modules 4 and 5 is that students use place value reasoning to explain why their addition and subtraction strategies work.

In Module 6, students extend their understanding of a unit to build the foundation for multiplication and division wherein any number, not just powers of ten, can be a unit. Making equal groups of “four apples each” establishes the unit “four apples” (or just four) that can then be counted: 1 four, 2 fours, 3 fours, etc. Relating the new unit to the one used to create it lays the foundation for multiplication: 3 groups of 4 apples equal 12 apples (or 3 fours is 12).

Module 7 provides another opportunity for students to practice their algorithms and problem-solving skills with perhaps the most well-known, interesting units of all: dollars, dimes, and pennies. Measuring and estimating length is revisited in this module in the context of units from both the customary system (e.g., inches and feet) and the metric system (e.g., centimeters and meters). As they study money and length, students represent data given by measurement and money data using picture graphs, bar graphs, and line plots.

Students finish Grade 2 by describing and analyzing shapes in terms of their sides and angles. In Module 8, students investigate, describe, and reason about the composition and decomposition of shapes to form other shapes. Through building, drawing, and analyzing two- and three-dimensional shapes, students develop a foundation for understanding area, volume, congruence, similarity, and symmetry in later grades.

Alignment Chart

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 2 Modules ³⁶
Module 1: Sums and Differences to 20 (10 days)	<p>Represent and solve problems involving addition and subtraction.³⁷</p> <p>2.OA.1 Use addition and subtraction within 100 to solve one- and two-step word problems involving situations of adding to, taking from, putting together, taking apart, and comparing, with unknowns in all positions, e.g., by using drawings and equations with a symbol for the unknown number to represent the problem. (See Glossary, Table 1.)</p> <p>Add and subtract within 20.³⁸</p> <p>2.OA.2 Fluently add and subtract within 20 using mental strategies. (See standard 1.OA.6 for a list of mental strategies.) By end of grade 2, know from memory all sums of two one-digit numbers.</p> <p>Use place value understanding and properties of operations to add and subtract.³⁹</p> <p>2.NBT.5 Fluently add and subtract within 100 using strategies based on place value, properties of operations, and/or the relationship between addition and subtraction.</p>
Module 2: Addition and Subtraction of Length Units (12 days)	<p>Measure and estimate lengths in standard units.⁴⁰</p> <p>2.MD.1 Measure the length of an object by selecting and using appropriate tools such as rulers, yardsticks, meter sticks, and measuring tapes.</p> <p>2.MD.2 Measure the length of an object twice, using length units of different lengths for the two measurements; describe how the two measurements relate to the size of the unit chosen.</p> <p>2.MD.3 Estimate lengths using units of inches, feet, centimeters, and meters.</p> <p>2.MD.4 Measure to determine how much longer one object is than another, expressing the length</p>

³⁶ When a cluster is referred to in this chart without a footnote, the cluster is taught in its entirety.

³⁷ In this module, word problems focus primarily on result unknown and change unknown situations.

³⁸ From this point forward, fluency practice with addition and subtraction to 20 is part of the students' ongoing experience.

³⁹ The balance of this cluster is addressed in Modules 4 and 5.

⁴⁰ Focus is on metric measurement in preparation for place value in Module 3. Customary measurement is addressed in Module 7.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 2 Modules ³⁶
	<p>difference in terms of a standard length unit.</p> <p>Relate addition and subtraction to length.</p> <p>2.MD.5 Use addition and subtraction within 100 to solve word problems involving lengths that are given in the same units, e.g., by using drawings (such as drawings of rulers) and equations with a symbol for the unknown number to represent the problem.</p> <p>2.MD.6 Represent whole numbers as lengths from 0 on a number line diagram with equally spaced points corresponding to the numbers 0, 1, 2, ..., and represent whole-number sums and differences within 100 on a number line diagram.</p>
<p>Module 3: Place Value, Counting, and Comparison of Numbers to 1000 (25 days)</p>	<p>Understand place value.</p> <p>2.NBT.1 Understand that the three digits of a three-digit number represent amounts of hundreds, tens and ones; e.g., 706 equals 7 hundreds, 0 tens, and 6 ones. Understand the following as special cases:</p> <ul style="list-style-type: none"> a. 100 can be thought of as a bundle of ten tens – called a “hundred.” b. The numbers 100, 200, 300, 400, 500, 600, 700, 800, 900 refer to one, two, three, four, five, six, seven, eight, or nine hundreds (and 0 tens and 0 ones). <p>2.NBT.2 Count within 1000; skip-count by 5s⁴², 10s, and 100s.</p> <p>2.NBT.3 Read and write numbers to 1000 using base-ten numerals, number names, and expanded form.</p> <p>2.NBT.4 Compare two three-digit numbers based on meanings of the hundreds, tens, and ones digits, using >, =, and < symbols to record the results of comparisons.</p>
<p>Module 4: Addition and Subtraction Within 200 with Word Problems to 100</p>	<p>Represent and solve problems involving addition and subtraction.</p> <p>2.OA.1 Use addition and subtraction within 100 to solve one- and two-step word problems involving situations of adding to, taking from, putting together, taking apart, and comparing, with</p>

⁴² Use analog clock to provide a context for skip-counting by 5s.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 2 Modules ³⁶
(35 days)	<p>unknowns in all positions, e.g., by using drawings and equations with a symbol for the unknown number to represent the problem. (See Glossary, Table 1.)</p> <p>Use place value understanding and properties of operations to add and subtract.⁴⁴</p> <p>2.NBT.5 Fluently add and subtract within 100 using strategies based on place value, properties of operations, and/or the relationship between addition and subtraction.</p> <p>2.NBT.6 Add up to four two-digit numbers using strategies based on place value and properties of operations.</p> <p>2.NBT.7 Add and subtract within 1000, using concrete models or drawings and strategies based on place value, properties of operations, and/or the relationship between addition and subtraction; relate the strategy to a written method. Understand that in adding or subtracting three-digit numbers, one adds or subtracts hundreds and hundreds, tens and tens, ones and ones; and sometimes it is necessary to compose or decompose tens or hundreds.</p> <p>2.NBT.8 Mentally add 10 or 100 to a given number 100-900, and mentally subtract 10 or 100 from a given number 100-900.</p> <p>2.NBT.9 Explain why addition and subtraction strategies work, using place value and the properties of operations. (Explanations may be supported by drawings or objects.)</p>
<p>Module 5: Addition and Subtraction Within 1000 with Word Problems to 100 (24 days)</p>	<p>Use place value understanding and properties of operations to add and subtract.⁴⁵</p> <p>2.NBT.7 Add and subtract within 1000, using concrete models or drawings and strategies based on place value, properties of operations, and/or the relationship between addition and subtraction; relate the strategy to a written method. Understand that in adding or subtracting three-digit numbers, one adds or subtracts hundreds and hundreds, tens and tens, ones and ones; and sometimes it is necessary to compose or decompose tens or hundreds.</p> <p>2.NBT.8 Mentally add 10 or 100 to a given number 100-900, and mentally subtract 10 or 100 from a given</p>

⁴⁴ In this module, work is limited to within 200. This work is extended to numbers within 1000 in the next module.

⁴⁵ The balance of this cluster is addressed in Module 4.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 2 Modules ³⁶
	<p>number 100-900.</p> <p>2.NBT.9 Explain why addition and subtraction strategies work, using place value and the properties of operations. (Explanations may be supported by drawings or objects.)</p>
<p>Module 6: Foundations of Multiplication and Division (24 days)</p>	<p>Work with equal groups of objects to gain foundations for multiplication.</p> <p>2.OA.3 Determine whether a group of objects (up to 20) has an odd or even number of members, e.g., by pairing objects or counting them by 2s; write an equation to express an even number as a sum of two equal addends.</p> <p>2.OA.4 Use addition to find the total number of objects arranged in rectangular arrays with up to 5 rows and up to 5 columns; write an equation to express the total as a sum of equal addends.</p> <p>Reason with shapes and their attributes.⁴⁷</p> <p>2.G.2 Partition a rectangle into rows and columns of same size squares and count to find the total number of them.</p>
<p>Module 7: Problem Solving with Length, Money, and Data (30 days)</p>	<p>Measure and estimate lengths in standard units.</p> <p>2.MD.1 Measure the length of an object by selecting and using appropriate tools such as rulers, yardsticks, meter sticks, and measuring tapes.</p> <p>2.MD.2 Measure the length of an object twice, using length units of different lengths for the two measurements; describe how the two measurements relate to the size of the unit chosen.</p> <p>2.MD.3 Estimate lengths using units of inches, feet, centimeters, and meters.</p> <p>2.MD.4 Measure to determine how much longer one object is than another, expressing the length difference in terms of a standard length unit.</p> <p>Relate addition and subtraction to length.</p> <p>2.MD.5 Use addition and subtraction within 100 to solve word problems involving lengths that are given</p>

⁴⁷ 2.G.2 is taught before G.1 and G.3 because the array model is so important to the foundation for multiplication.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 2 Modules ³⁶
	<p>in the same units, e.g., by using drawings (such as drawings of rulers) and equations with a symbol for the unknown number to represent the problems.</p> <p>2.MD.6 Represent whole numbers as lengths from 0 on a number line diagram with equally spaced points corresponding to the numbers 0, 1, 2, ..., and represent whole-number sums and differences within 100 on a number line diagram.</p> <p>Work with time and money.⁴⁹</p> <p>2.MD.8 Solve word problems involving dollar bills, quarters, dimes, nickels, and pennies, using \$ and ¢ symbols appropriately. <i>Example: If you have 2 dimes and 3 pennies, how many cents do you have?</i></p> <p>Represent and interpret data.</p> <p>2.MD.9 Generate measurement data by measuring lengths of several objects to the nearest whole unit, or by making repeated measurements of the same object. Show the measurements by making a line plot, where the horizontal scale is marked off in whole-number units.</p> <p>2.MD.10 Draw a picture graph and a bar graph (with single-unit scale) to represent a data set with up to four categories. Solve simple put-together, take-apart, and compare problems (See Glossary, Table 1.) using information presented in a bar graph.</p>
<p>Module 8: Time, Shapes, and Fractions as Equal Parts of Shapes (20 days)</p>	<p>Work with time and money.⁵⁰</p> <p>2.MD.7 Tell time and write time from analog and digital clocks to the nearest five minutes, using a.m. and p.m.</p> <p>Reason with shapes and their attributes.</p> <p>2.G.1 Recognize and draw shapes having specified attributes, such as a given number of angles or a given number of equal faces. (Sizes are compared directly or visually, not compared by measuring.) Identify triangles, quadrilaterals, pentagons, hexagons, and cubes.</p>

⁴⁹ Focus on money. Time is addressed in Module 8.

⁵⁰ Focus on time. Money is addressed in Module 7.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 2 Modules ³⁶
	2.G.3 Partition circles and rectangles into two, three, or four equal shares, describe the shares using the words <i>halves</i> , <i>thirds</i> , <i>half of</i> , <i>a third of</i> , etc., and describe the whole as two halves, three thirds, four fourths. Recognize that equal shares of identical wholes need not have the same shape.

Sequence of Grade 3 Modules Aligned with the Standards

Module 1: Properties of Multiplication and Division and Solving Problems with Units of 2–5 and 10

Module 2: Place Value and Problem Solving with Units of Measure

Module 3: Multiplication and Division with Units of 0, 1, 6–9, and Multiples of 10

Module 4: Multiplication and Area

Module 5: Fractions as Numbers on the Number Line

Module 6: Collecting and Displaying Data

Module 7: Geometry and Measurement Word Problems

Summary of Year

Third Grade mathematics is about (1) developing understanding of multiplication and division and strategies for multiplication and division within 100; (2) developing understanding of fractions, especially unit fractions (fractions with numerator 1); (3) developing understanding of the structure of rectangular arrays and of area; and (4) describing and analyzing two-dimensional shapes.

Key Areas of Focus for 3-5: Multiplication and division of whole numbers and fractions—concepts, skills, and problem solving

Required Fluency: 3.OA.7 Multiply and divide within 100.
3.NBT.2 Add and subtract within 1000.

CCLS Major Emphasis Clusters

Operations and Algebraic Thinking

- Represent and solve problems involving multiplication and division.
- Understand the properties of multiplication and the relationship between multiplication and division.
- Multiply and divide within 100.
- Solve problems involving the four operations and identify and explain patterns in arithmetic.

Number and Operations – Fractions

- Develop understanding of fractions as numbers.

Measurement and Data

- Solve problems involving measurement and estimation of intervals of time, liquid volumes, and masses of objects.
- Geometric measurement: understand concepts of area and relate area to multiplication and to addition.

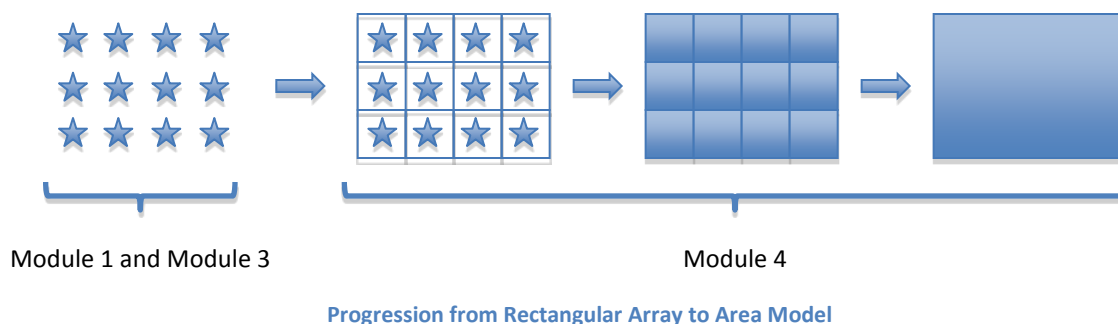
Rationale for Module Sequence in Grade 3

The first module builds upon the foundation of multiplicative thinking with units started in Grade 2. First, students concentrate on the meaning of multiplication and division and begin developing fluency for learning products involving factors of 2, 3, 4, 5, and 10 (see key areas of focus and

required fluency above). The restricted set of facts keeps learning manageable, and also provides enough examples to do one- and two-step word problems and to start measurement problems involving weight, capacity and time in the second module.

Module 2 focuses on measurement of time and metric weight and capacity. In exploratory lessons, students decompose a kilogram into 100 gram, 10 gram and 1 gram weights and decompose a liter into analogous amounts of milliliters. Metric measurement thereby develops the concept of mixed units, e.g. 3 kilograms 400 grams is clearly related to 3 thousands, 4 hundreds. Students then apply their new understanding of number to place value, comparison and rounding, composing larger units when adding, decomposing into smaller units when subtracting. Students also draw proportional tape diagrams to solve word problems (e.g., “If this tape represents 62 kg, then a tape representing 35 kg needs to be slightly longer than half the 62 kg bar...”). Drawing the relative sizes of the lengths involved in the model prepares students to locate fractions on a number line in Module 5 (where they learn to locate points on the number line relative to each other and relative to the whole unit). Module 2 also provides students with internalization time for learning the 2, 3, 4, 5, and 10 facts as part of their fluency activities.

Students learn the remaining multiplication and division facts in Module 3 as they continue to develop their understanding of multiplication and division strategies within 100 and use those strategies to solve two-step word problems. The “2, 3, 4, 5 and 10 facts” module (Module 1) and the “0, 1, 6, 7, 8, 9 and multiples of 10 facts” module (Module 3) both provide important, sustained time for work in understanding the structure of rectangular arrays to prepare students for area in Module 4. This work is necessary because students initially find it difficult to distinguish the different units in a grid (the third array in the picture below), count them and recognize that the count is related to multiplication. Tiling also supports a correct interpretation of the grid. Modules 1 and 3 slowly build up to the area model (the fourth model in the picture below) using rectangular arrays in the context of learning multiplication and division:



By Module 4, students are ready to investigate area. They measure the area of a shape by finding the total number of same-size units of area, e.g. tiles, required to cover the shape without gaps or overlaps. When that shape is a rectangle with whole number side lengths, it is easy to partition the rectangle into squares with equal areas (as in the third stage of the illustration above).

One goal of Module 5 is for students to transition from thinking of fractions as area or parts of a figure to points on a number line. To make that jump, students think of fractions as being constructed out of unit fractions: “1 fourth” is the length of a segment on the number line such that the length of four concatenated fourth segments on the line equals 1 (the whole). Once the unit “1 fourth” has been established, counting them is as easy as counting whole numbers: 1 fourth, 2 fourths, 3 fourths, 4 fourths, 5 fourths, etc. Students also compare fractions, find equivalent fractions in special cases, and solve problems that involve fractions.

In Module 6, students leave the world of exact measurements behind. By applying their knowledge of fractions from Module 5, they estimate lengths to the nearest halves and fourths of an inch and record that information in bar graphs and line plots. This module also prepares students for the multiplicative comparison problems of Grade 4 by asking students “how many more” and “how many less” questions about scaled bar graphs.

The year rounds out with plenty of time to solve two-step word problems involving the four operations, and to improve fluency for concepts and skills initiated earlier in the year. In Module 7, students also describe, analyze, and compare properties of two-dimensional shapes. By now, students have done enough work with both linear and area measurement models to understand that there is no relationship in general between the area of a figure and perimeter, which is one of the concepts taught in the last module.

Alignment Chart

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 3 Modules ⁵²
Module 1: Properties of Multiplication and Division and Solving Problems with Units of 2–5 and 10 (25 days)	Represent and solve problems involving multiplication and division.⁵³ 3.OA.1 Interpret products of whole numbers, e.g., interpret 5×7 as the total number of objects in 5 groups of 7 objects each. <i>For example, describe a context in which a total number of objects can be expressed as 5×7.</i> 3.OA.2 Interpret whole-number quotients of whole numbers, e.g., interpret $56 \div 8$ as the number of

⁵² When a cluster is referred to in this chart without a footnote, the cluster is taught in its entirety.

⁵³ In this module, work is limited to factors of 2–5 and 10 and the corresponding dividends.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 3 Modules ⁵²
	<p>objects in each share when 56 objects are partitioned equally into 8 shares, or as a number of shares when 56 objects are partitioned into equal shares of 8 objects each. <i>For example, describe a context in which a number of shares or a number of groups can be expressed as $56 \div 8$.</i></p> <p>3.OA.3 Use multiplication and division within 100 to solve word problems in situations involving equal groups, arrays, and measurement quantities, e.g., by using drawings and equations with a symbol for the unknown number to represent the problem. (See Glossary, Table 2.)</p> <p>3.OA.4 Determine the unknown whole number in a multiplication or division equation relating three whole numbers. <i>For example, determine the unknown number that makes the equation true in each of the equations $8 \times ? = 48$, $5 = _ \div 3$, $6 \times 6 = ?$</i></p> <p>Understand properties of multiplication and the relationship between multiplication and division.⁵⁴</p> <p>3.OA.5 Apply properties of operations as strategies to multiply and divide. (Students need not use formal terms for these properties.) <i>Examples: If $6 \times 4 = 24$ is known, then $4 \times 6 = 24$ is also known. (Commutative property of multiplication.) $3 \times 5 \times 2$ can be found by $3 \times 5 = 15$, then $15 \times 2 = 30$, or by $5 \times 2 = 10$, then $3 \times 10 = 30$. (Associative property of multiplication.) Knowing that $8 \times 5 = 40$ and $8 \times 2 = 16$, one can find 8×7 as $8 \times (5 + 2) = (8 \times 5) + (8 \times 2) = 40 + 16 = 56$. (Distributive property.)</i>⁵⁵</p> <p>3.OA.6 Understand division as an unknown-factor problem. <i>For example, find $32 \div 8$ by finding the number that makes 32 when multiplied by 8.</i></p> <p>Multiply and divide within 100.⁵⁶</p> <p>3.OA.7 Fluently multiply and divide within 100, using strategies such as the relationship between multiplication and division (e.g., knowing that $8 \times 5 = 40$, one knows $40 \div 5 = 8$) or properties of operations. By the end of Grade 3, know from memory all products of two one-digit numbers.</p> <p>Solve problems involving the four operations, and identify and explain patterns in arithmetic.⁵⁷</p>

⁵⁴ In this module, work is limited to factors of 2–5 and 10 and the corresponding dividends.

⁵⁵ The Associative property is addressed in Module 3.

⁵⁶ In this module, work is limited to factors of 2–5 and 10 and the corresponding dividends.

⁵⁷ In this module, problem solving is limited to multiplication and division, and limited to factors of 2–5 and 10 and the corresponding dividends. 3.OA.9 is addressed in Module 3.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 3 Modules ⁵²
	<p>3.OA.8 Solve two-step word problems using the four operations. Represent these problems using equations with a letter standing for the unknown quantity. Assess the reasonableness of answers using mental computation and estimation strategies including rounding. (This standard is limited to problems posed with whole numbers and having whole-number answers; students should know how to perform operations in the conventional order when there are no parentheses to specify a particular order, i.e., Order of Operations.)</p>
<p>Module 2: Place Value and Problem Solving with Units of Measure (25 days)</p>	<p>Use place value understanding and properties of operations to perform multi-digit arithmetic. (A range of algorithms may be used.)⁵⁸</p> <p>3.NBT.1 Use place value understanding to round whole numbers to the nearest 10 or 100.</p> <p>3.NBT.2 Fluently add and subtract within 1000 using strategies and algorithms based on place value, properties of operations, and/or the relationship between addition and subtraction.</p> <p>Solve problems involving measurement and estimation of intervals of time, liquid volumes, and masses of objects.</p> <p>3.MD.1 Tell and write time to the nearest minute and measure time intervals in minutes. Solve word problems involving addition and subtraction of time intervals in minutes, e.g., by representing the problem on a number line diagram.</p> <p>3.MD.2 Measure and estimate liquid volumes and masses of objects using standard units of grams (g), kilograms (kg), and liters (l). (Excludes compound units such as cm^3 and finding the geometric volume of a container.) Add, subtract, multiply, or divide to solve one-step word problems involving masses or volumes that are given in the same units, e.g., by using drawings (such as a beaker with a measurement scale) to represent the problem. (Excludes multiplicative comparison problems, i.e., problems involving notions of “times as much”; see Glossary, Table 2.)</p>

⁵⁸ 3.NBT.3 is taught in Module 3.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 3 Modules ⁵²
Module 3: Multiplication and Division with Units of 0, 1, 6–9, and Multiples of 10 (25 days)	<p>Represent and solve problems involving multiplication and division.⁵⁹</p> <p>3.OA.3 Use multiplication and division within 100 to solve word problems in situations involving equal groups, arrays, and measurement quantities, e.g., by using drawings and equations with a symbol for the unknown number to represent the problem. (See Glossary, Table 2.)</p> <p>3.OA.4 Determine the unknown whole number in a multiplication or division equation relating three whole numbers. <i>For example, determine the unknown number that makes the equation true in each of the equations $8 \times ? = 48$, $5 = __\div 3$, $6 \times 6 = ?$</i></p> <p>Understand properties of multiplication and the relationship between multiplication and division.</p> <p>3.OA.5 Apply properties of operations as strategies to multiply and divide. (Students need not use formal terms for these properties.) <i>Examples: If $6 \times 4 = 24$ is known, then $4 \times 6 = 24$ is also known. (Commutative property of multiplication.) $3 \times 5 \times 2$ can be found by $3 \times 5 = 15$, then $15 \times 2 = 30$, or by $5 \times 2 = 10$, then $3 \times 10 = 30$. (Associative property of multiplication.) Knowing that $8 \times 5 = 40$ and $8 \times 2 = 16$, one can find 8×7 as $8 \times (5 + 2) = (8 \times 5) + (8 \times 2) = 40 + 16 = 56$. (Distributive property.)</i></p> <p>Multiply and divide within 100.⁶⁰</p> <p>3.OA.7 Fluently multiply and divide within 100, using strategies such as the relationship between multiplication and division (e.g., knowing that $8 \times 5 = 40$, one knows $40 \div 5 = 8$) or properties of operations. By the end of Grade 3, know from memory all products of two one-digit numbers.</p> <p>Solve problems involving the four operations, and identify and explain patterns in arithmetic.⁶¹</p> <p>3.OA.8 Solve two-step word problems using the four operations. Represent these problems using equations with a letter standing for the unknown quantity. Assess the reasonableness of answers using mental computation and estimation strategies including rounding. (This standard is limited to problems posed with whole numbers and having whole-number answers; students should know how to perform operations in the conventional order when there are no</p>

⁵⁹ The balance of this cluster is addressed in Module 1.

⁶⁰ From this point forward, fluency practice with multiplication and division facts is part of the students' on-going experience.

⁶¹ After being fully taught in Module 3, this standard (as well as 3.OA.3) continues being practiced throughout the remainder of the school year.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 3 Modules ⁶²
	<p>parentheses to specify a particular order, i.e., Order of Operations.)</p> <p>3.OA.9 Identify arithmetic patterns (including patterns in the addition table or multiplication table), and explain them using properties of operations. <i>For example, observe that 4 times a number is always even, and explain why 4 times a number can be decomposed into two equal addends.</i></p> <p>Use place value understanding and properties of operations to perform multi-digit arithmetic. (A range of algorithms may be used.)⁶²</p> <p>3.NBT.3 Multiply one-digit whole numbers by multiples of 10 in the range 10–90 (e.g., 9×80, 5×60) using strategies based on place value and properties of operations.</p>
<p>Module 4: Multiplication and Area (20 days)</p>	<p>Geometric measurement: understand concepts of area and relate area to multiplication and to addition.</p> <p>3.MD.5 Recognize area as an attribute of plane figures and understand concepts of area measurement.</p> <ol style="list-style-type: none"> A square with side length 1 unit, called “a unit square,” is said to have “one square unit” of area, and can be used to measure area. A plane figure which can be covered without gaps or overlaps by n unit squares is said to have an area of n square units. <p>3.MD.6 Measure areas by counting unit squares (square cm, square m, square in, square ft, and improvised units).</p> <p>3.MD.7 Relate area to the operations of multiplication and addition.</p> <ol style="list-style-type: none"> Find the area of a rectangle with whole-number side lengths by tiling it, and show that the area is the same as would be found by multiplying the side lengths. Multiply side lengths to find areas of rectangles with whole-number side lengths in the context of solving real world and mathematical problems, and represent whole-number products as rectangular areas in mathematical reasoning. Use tiling to show in a concrete case that the area of a rectangle with whole-number side

⁶² The balance of this cluster is addressed in Module 2.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 3 Modules ⁵²
	<p>lengths a and $b + c$ is the sum of $a \times b$ and $a \times c$. Use area models to represent the distributive property in mathematical reasoning.</p> <p>d. Recognize area as additive. Find areas of rectilinear figures by decomposing them into non-overlapping rectangles and adding the areas of the non-overlapping parts, applying this technique to solve real world problems.</p>
<p>Module 5: Fractions as Numbers on the Number Line (35 days)</p>	<p>Develop understanding of fractions as numbers. (Grade 3 expectations in this domain are limited to fractions with denominators 2, 3, 4, 6, and 8.)</p> <p>3.NF.1 Understand a fraction $1/b$ as the quantity formed by 1 part when a whole is partitioned into b equal parts; understand a fraction a/b as the quantity formed by a parts of size $1/b$.</p> <p>3.NF.2 Understand a fraction as a number on the number line; represent fractions on a number line diagram.</p> <p>a. Represent a fraction $1/b$ on a number line diagram by defining the interval from 0 to 1 as the whole and partitioning it into b equal parts. Recognize that each part has size $1/b$ and that the endpoint of the part based at 0 locates the number $1/b$ on the number line.</p> <p>b. Represent a fraction a/b on a number line diagram by marking off a lengths $1/b$ from 0. Recognize that the resulting interval has size a/b and that its endpoint locates the number a/b on the number line.</p> <p>3.NF.3 Explain equivalence of fractions in special cases, and compare fractions by reasoning about their size.</p> <p>a. Understand two fractions as equivalent (equal) if they are the same size, or the same point on a number line.</p> <p>b. Recognize and generate simple equivalent fractions, e.g., $1/2 = 2/4$, $4/6 = 2/3$. Explain why the fractions are equivalent, e.g., by using a visual fraction model.</p> <p>c. Express whole numbers as fractions, and recognize fractions that are equivalent to whole numbers. <i>Examples: Express 3 in the form $3 = 3/1$; recognize that $6/1 = 6$; locate $4/4$ and 1 at</i></p>

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 3 Modules ⁵²
	<p><i>the same point of a number line diagram.</i></p> <p>d. Compare two fractions with the same numerator or the same denominator by reasoning about their size. Recognize that comparisons are valid only when the two fractions refer to the same whole. Record the results of comparisons with the symbols $>$, $=$, or $<$, and justify the conclusions, e.g., by using a visual fraction model.</p> <p>Reason with shapes and their attributes.⁶³</p> <p>3.G.2 Partition shapes into parts with equal areas. Express the area of each part as a unit fraction of the whole. For example, partition a shape into 4 parts with equal area and describe the area of each part as $\frac{1}{4}$ of the area of the shape.</p>
Module 6: Collecting and Displaying Data (10 days)	<p>Represent and interpret data.</p> <p>3.MD.3 Draw a scaled picture graph and a scaled bar graph to represent a data set with several categories. Solve one- and two- step “how many more” and “how many less” problems using information presented in scaled bar graphs. <i>For example, draw a bar graph in which each square in the bar graph might represent 5 pets.</i></p> <p>3.MD.4 Generate measurement data by measuring lengths using rulers marked with halves and fourths of an inch. Show the data by making a line plot, where the horizontal scale is marked off in appropriate units – whole numbers, halves, or quarters.</p>
Module 7: Geometry and Measurement Word Problems ⁶⁴ (40 days)	<p>Represent and interpret data.⁶⁵</p> <p>3.MD.4 Generate measurement data by measuring lengths using rulers marked with halves and fourths of an inch. Show the data by making a line plot, where the horizontal scale is marked off in appropriate units – whole numbers, halves, or quarters.</p> <p>Geometric measurement: recognize perimeter as an attribute of plane figures and distinguish between linear</p>

⁶³ 3.G.1 is taught in Module 7.

⁶⁴ The seemingly eclectic set of standards in Module 7 allows for a new level of word problems, including perimeter and measurement word problems.

⁶⁵ 3.MD.3 is taught in Module 6.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 3 Modules ⁵²
	<p>and area measures.</p> <p>3.MD.8 Solve real world and mathematical problems involving perimeters of polygons, including finding the perimeter given the side lengths, finding an unknown side length, and exhibiting rectangles with the same perimeter and different areas or with the same area and different perimeters.</p> <p>Reason with shapes and their attributes.</p> <p>3.G.1 Understand that shapes in different categories (e.g., rhombuses, rectangles, and others) may share attributes (e.g., having four sides), and that the shared attributes can define a larger category (e.g., quadrilaterals). Recognize rhombuses, rectangles, and squares as examples of quadrilaterals, and draw examples of quadrilaterals that do not belong to any of these subcategories.</p>

Sequence of Grade 4 Modules Aligned with the Standards

Module 1: Place Value, Rounding, and Algorithms for Addition and Subtraction

Module 2: Unit Conversions and Problem Solving with Metric Measurement

Module 3: Multi-Digit Multiplication and Division

Module 4: Angle Measure and Plane Figures

Module 5: Fraction Equivalence, Ordering, and Operations

Module 6: Decimal Fractions

Module 7: Exploring Multiplication

Summary of Year

Fourth grade mathematics is about (1) developing understanding and fluency with multi-digit multiplication, and developing understanding of dividing to find quotients involving multi-digit dividends; (2) developing an understanding of fraction equivalence, addition and subtraction of fractions with like denominators, and multiplication of fractions by whole numbers; and (3) understanding that geometric figures can be analyzed and classified based on their properties, such as having parallel sides, perpendicular sides, particular angle measures, and symmetry.

Key Areas of Focus for 3-5: Multiplication and division of whole numbers and fractions—concepts, skills, and problem solving

Required Fluency: 4.NBT.4 Add and subtract within 1,000,000.

Rationale for Module Sequence in Grade 4

In Grade 4, students extend their work with whole numbers. They begin with large numbers using familiar units (tens and hundreds) and develop their understanding of thousands by building knowledge of the pattern of *times ten* in the base ten system on the place value chart (**4.NBT.1**). In

CCLS Major Emphasis Clusters
<p>Operations and Algebraic Thinking</p> <ul style="list-style-type: none"> Use the four operations with whole numbers to solve problems. <p>Number and Operations in Base Ten</p> <ul style="list-style-type: none"> Generalize place value understanding for multi-digit whole numbers. Use place value understanding and properties of operations to perform multi-digit arithmetic. <p>Number and Operations – Fractions</p> <ul style="list-style-type: none"> Extend understanding of fraction equivalence and ordering. Build fractions from unit fractions by applying and extending previous understandings of operations on whole numbers. Understand decimal notation for fractions, and compare decimal fractions.

Grades 2 and 3 students focused on developing the concept of composing and decomposing place value units within the addition and subtraction algorithms. Now, in Grade 4, those (de)compositions are seen through the lens of multiplicative comparison, e.g. 1 thousand is 10 times as much as 1 hundred. They next apply their broadened understanding of patterns on the place value chart to compare, round, add and subtract. The module culminates with solving multi-step word problems involving addition and subtraction modeled with tape diagrams that focus on numerical relationships.

The algorithms continue to play a part in Module 2 as students relate place value to metric units. This module helps students draw similarities between:

1 ten	= 10 ones
1 hundred	= 10 tens
1 hundred	= 100 ones
1 meter	= 100 centimeters
1 thousand	= 1,000 ones
1 kilometer	= 1,000 meters
1 kilogram	= 1,000 grams
1 liter	= 1,000 milliliters

Students work with metric measurement in the context of the addition and subtraction algorithms, mental math, place value, and word problems. Customary units are used as a context for fractions in Module 5.

In Module 3, measurements provide the concrete foundation behind the distributive property in the multiplication algorithm: $4 \times (1 \text{ m } 2 \text{ cm})$ can be made physical using ribbon, where it is easy to see the 4 copies of 1 m and the 4 copies of 2 cm. Likewise, $4 \times (1 \text{ ten } 2 \text{ ones}) = 4 \text{ tens } 8 \text{ ones}$. Students then turn to the place value table with number disks to develop efficient procedures for multiplying and dividing one-digit whole numbers and use the table with number disks to understand and explain why the procedures work. Students also solve word problems throughout the module where they select and accurately apply appropriate methods to estimate, mentally calculate, or use the procedures they are learning to compute products and quotients.

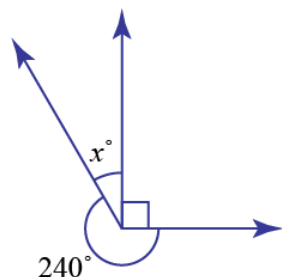
Module 4 focuses as much on solving unknown angle problems using letters and equations as it does on building, drawing, and analyzing two-dimensional shapes in geometry. Students have already used letters and equations to solve word problems in earlier grades. They continue to do so in Grade 4, and now they also learn to solve unknown angle problems: work that challenges students to build and solve equations to find unknown

angle measures. First, students learn the definition of degree and learn how to measure angles in degrees using a circular protractor. From the definition of degree and the fact that angle measures are additive, the following rudimentary facts about angles naturally follow:

1. The sum of angle measurements around a point is 360 degrees.
2. The sum of angle measurements on a line is 180 degrees.
3. Hence, from 1 and 2, students see that vertical angles are equal.
- 4.

Armed only with these facts, students are able to generate and solve equations as in the following problem:

Find the unknown angle x .



$$X + 240 + 90 = 360$$

$$X + 330 = 360$$

$$X = 30$$

Unknown angle problems help to unlock algebraic concepts for students *because such problems are visual*. The x clearly stands for a specific number: If a student wished, he could place a protractor down on that angle and measure it to find x . But doing so destroys the joy of deducing the answer and solving the puzzle on his own.

Module 5 centers on equivalent fractions and operations with fractions. We use fractions when there is a given unit, the *whole unit*, but we want to measure using a smaller unit, called the *fractional unit*. To prepare students to explore the relationship between a fractional unit and its whole unit, examples of such relationships in different contexts were already carefully established earlier in the year:

360 degrees in	1 complete turn
100 centimeters in	1 meter
1000 grams in	1 kilogram
1000 milliliters in	1 liter

The beauty of fractional units, once defined and understood, is that they behave just as all other units do:

- “3 fourths + 5 fourths = 8 fourths” just as “3 meters + 5 meters = 8 meters”
- “4 x 3 fourths = 12 fourths” just as “4 x 3 meters = 12 meters”

Students add and subtract fractions with like units using the area model and the number line. They multiply a fraction by a whole number where the interpretation is as repeated addition e.g. 3 fourths + 3 fourths = 2 x 3 fourths. Through this introduction to fraction arithmetic they gradually come to understand fractions as units they can manipulate, just like whole numbers. Throughout the module, customary units of measurement provide a relevant context for the arithmetic.

Module 6, on decimal fractions, starts with the realization that decimal place value units are simply special fractional units: 1 tenth = $\frac{1}{10}$, 1 hundredth = $\frac{1}{100}$, etc. Fluency plays an important role in this topic as students learn to relate $\frac{3}{10} = 0.3 = 3$ tenths. They also recognize that 3 tenths is equal to 30 hundredths and subsequently have their first experience adding and subtracting fractions with unlike units e.g., 3 tenths + 4 hundredths = 30 hundredths + 4 hundredths.

The year ends with a module focused on multiplication and measurement as they solve multi-step word problems. Exploratory lessons support conceptual understanding of the relative sizes of measurement units. Students explore conversion in hands-on settings and subsequently apply those conversions to solve multi-step word problems involving all operations and multiplicative comparison.

Alignment Chart

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 4 Modules ⁶⁶
Module 1: Place Value, Rounding, and Algorithms for Addition and Subtraction (25 days)	Use the four operations with whole numbers to solve problems.⁶⁷ 4.OA.3 Solve multistep word problems posed with whole numbers and having whole-number answers using the four operations, including problems in which remainders must be interpreted. Represent these problems using equations with a letter standing for the unknown quantity. Assess the reasonableness of answers using mental computation and estimation strategies including rounding.

⁶⁶ When a cluster is referred to in this chart without a footnote, the cluster is taught in its entirety.

⁶⁷ 4.OA.1 and 4.OA.2 are addressed in Modules 3 and 7.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 4 Modules ⁶⁶
	<p>Generalize place value understanding for multi-digit whole numbers. (Grade 4 expectations in this domain are limited to whole numbers less than or equal to 1,000,000.)</p> <p>4.NBT.1 Recognize that in a multi-digit whole number, a digit in one place represents ten times what it represents in the place to its right. <i>For example, recognize that $700 \div 70 = 10$ by applying concepts of place value and division.</i></p> <p>4.NBT.2 Read and write multi-digit whole numbers using base-ten numerals, number names, and expanded form. Compare two multi-digit numbers based on meanings of the digits in each place, using $>$, $=$, and $<$ symbols to record the results of comparisons.</p> <p>4.NBT.3 Use place value understanding to round multi-digit whole numbers to any place.</p> <p>Use place value understanding and properties of operations to perform multi-digit arithmetic.⁶⁸</p> <p>4.NBT.4 Fluently add and subtract multi-digit whole numbers using the standard algorithm.</p>
<p>Module 2: Unit Conversions and Problem Solving with Metric Measurement (7 days)</p>	<p>Solve problems involving measurement and conversion of measurements from a larger unit to a smaller unit.⁶⁹</p> <p>4.MD.1 Know relative sizes of measurement units within one system of units including km, m, cm; kg, g; lb, oz.; l, ml; hr, min, sec. Within a single system of measurement, express measurements in a larger unit in terms of a smaller unit. Record measurement equivalents in a two-column table. <i>For example, know that 1 ft is 12 times as long as 1 in. Express the length of a 4 ft snake as 48 in. Generate a conversion table for feet and inches listing the number pairs (1, 12), (2, 24), (3, 36), ...</i></p> <p>4.MD.2 Use the four operations to solve word problems involving distances, intervals of time, liquid volumes, masses of objects, and money, including problems involving simple fractions or decimals, and problems that require expressing measurements given in a larger unit in terms of a smaller unit. Represent measurement quantities using diagrams such as number line diagrams that feature a measurement scale.</p>

⁶⁸ 4.NBT.5 is addressed in Modules 3 and 7; 4.NBT.6 is addressed in Module 3.

⁶⁹ The focus of this module is on the metric system to reinforce place value, mixed units, and word problems with unit conversions. Decimal and fraction word problems wait until Modules 5 and 6. 4.MD.3 is taught in Module 3.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 4 Modules ⁶⁶
Module 3: Multi-Digit Multiplication and Division (43 days)	<p>Use the four operations with whole numbers to solve problems.</p> <p>4.OA.1 Interpret a multiplication equation as a comparison, e.g., interpret $35 = 5 \times 7$ as a statement that 35 is 5 times as many as 7 and 7 times as many as 5. Represent verbal statements of multiplicative comparisons as multiplication equations.</p> <p>4.OA.2 Multiply or divide to solve word problems involving multiplicative comparison, e.g., by using drawings and equations with a symbol for the unknown number to represent the problem, distinguishing multiplicative comparison from additive comparison. (See Glossary, Table 2.)</p> <p>4.OA.3 Solve multistep word problems posed with whole numbers and having whole-number answers using the four operations, including problems in which remainders must be interpreted. Represent these problems using equations with a letter standing for the unknown quantity. Assess the reasonableness of answers using mental computation and estimation strategies including rounding.</p> <p>Gain familiarity with factors and multiples.</p> <p>4.OA.4 Find all factor pairs for a whole number in the range 1–100. Recognize that a whole number is a multiple of each of its factors. Determine whether a given whole number in the range 1–100 is a multiple of a given one-digit number. Determine whether a given whole number in the range 1–100 is prime or composite.</p> <p>Use place value understanding and properties of operations to perform multi-digit arithmetic. (Grade 4 expectations in this domain are limited to whole numbers less than or equal to 1,000,000.)⁷⁰</p> <p>4.NBT.5 Multiply a whole number of up to four digits by a one-digit whole number, and multiply two two-digit numbers, using strategies based on place value and the properties of operations. Illustrate and explain the calculation by using equations, rectangular arrays, and/or area models.⁷¹</p> <p>4.NBT.6 Find whole-number quotients and remainders with up to four-digit dividends and one-digit divisors, using strategies based on place value, the properties of operations, and/or the relationship between multiplication and division. Illustrate and explain the calculation by using</p>

⁷⁰ 4.NBT.4 is addressed in Module 1 and is then reinforced throughout the year.

⁷¹ Multiplying two two-digit numbers is addressed in Module 7.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 4 Modules ⁶⁶
	<p>equations, rectangular arrays, and/or area models.</p> <p>Solve problems involving measurement and conversion of measurements from a larger unit to a smaller unit.⁷²</p> <p>4.MD.3 Apply the area and perimeter formulas for rectangles in real world and mathematical problems. <i>For example, find the width of a rectangular room given the area of the flooring and the length, by viewing the area formula as a multiplication equation with an unknown factor.</i></p>
<p>Module 4:</p> <p>Angle Measure and Plane Figures</p> <p>(20 days)</p>	<p>Geometric measurement: understand concepts of angle and measure angles.</p> <p>4.MD.5 Recognize angles as geometric shapes that are formed wherever two rays share a common endpoint, and understand concepts of angle measurement:</p> <ol style="list-style-type: none"> An angle is measured with reference to a circle with its center at the common endpoint of the rays, by considering the fraction of the circular arc between the points where the two rays intersect the circle. An angle that turns through $\frac{1}{360}$ of a circle is called a “one-degree angle,” and can be used to measure angles. An angle that turns through n one-degree angles is said to have an angle measure of n degrees. <p>4.MD.6 Measure angles in whole-number degrees using a protractor. Sketch angles of specified measure.</p> <p>4.MD.7 Recognize angle measure as additive. When an angle is decomposed into non-overlapping parts, the angle measure of the whole is the sum of the angle measures of the parts. Solve addition and subtraction problems to find unknown angles on a diagram in real world and mathematical problems, e.g., by using an equation with a symbol for the unknown angle measure.</p> <p>Draw and identify lines and angles, and classify shapes by properties of their lines and angles.</p> <p>4.G.1 Draw points, lines, line segments, rays, angles (right, acute, obtuse), and perpendicular and</p>

⁷² 4.MD.1 is taught in Modules 2 and 7; 4.MD.2 is taught in Modules 2, 5, 6, and 7.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 4 Modules ⁶⁶
	<p>parallel lines. Identify these in two-dimensional figures.</p> <p>4.G.2 Classify two-dimensional figures based on the presence or absence of parallel or perpendicular lines, or the presence or absence of angles of a specified size. Recognize right triangles as a category, and identify right triangles.</p> <p>4.G.3 Recognize a line of symmetry for a two-dimensional figure as a line across the figure such that the figure can be folded along the line into matching parts. Identify line-symmetric figures and draw lines of symmetry.</p>
<p>Module 5: Fraction Equivalence, Ordering, and Operations⁷³ (45 days)</p>	<p>Generate and analyze patterns.</p> <p>4.OA.5 Generate a number or shape pattern that follows a given rule. Identify apparent features of the pattern that were not explicit in the rule itself. <i>For example, given the rule “Add 3” and the starting number 1, generate terms in the resulting sequence and observe that the terms appear to alternate between odd and even numbers. Explain informally why the numbers will continue to alternate in this way.</i></p> <p>Extend understanding of fraction equivalence and ordering. (Grade 4 expectations in this domain are limited to fractions with denominators 2, 3, 4, 5, 6, 8, 10, 12, and 100.)</p> <p>4.NF.1 Explain why a fraction a/b is equivalent to a fraction $(n \times a)/(n \times b)$ by using visual fraction models, with attention to how the number and size of the parts differ even though the two fractions themselves are the same size. Use this principle to recognize and generate equivalent fractions.</p> <p>4.NF.2 Compare two fractions with different numerators and different denominators, e.g., by creating common denominators or numerators, or by comparing to a benchmark fraction such as $1/2$. Recognize that comparisons are valid only when the two fractions refer to the same whole. Record the results of comparisons with symbols $>$, $=$, or $<$, and justify the conclusions, e.g., by using a visual fraction model.</p> <p>Build fractions from unit fractions by applying and extending previous understanding of operations on whole</p>

⁷³ Tenths and hundredths are important fractions in this module, represented in decimal form in Module 6.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 4 Modules ⁶⁶
	<p>numbers.</p> <p>4.NF.3 Understand a fraction a/b with $a > 1$ as a sum of fractions $1/b$.</p> <ol style="list-style-type: none"> Understand addition and subtraction of fractions as joining and separating parts referring to the same whole. Decompose a fraction into a sum of fractions with the same denominator in more than one way, recording each decomposition by an equation. Justify decompositions, e.g., by using a visual fraction model. <i>Examples:</i> $3/8 = 1/8 + 1/8 + 1/8$; $3/8 = 1/8 + 2/8$; $2\ 1/8 = 1 + 1 + 1/8 = 8/8 + 8/8 + 1/8$. Add and subtract mixed numbers with like denominators, e.g., by replacing each mixed number with an equivalent fraction, and/or by using properties of operations and the relationship between addition and subtraction. Solve word problems involving addition and subtraction of fractions referring to the same whole and having like denominators, e.g., by using visual fraction models and equations to represent the problem. <p>4.NF.4 Apply and extend previous understandings of multiplication to multiply a fraction by a whole number.</p> <ol style="list-style-type: none"> Understand a fraction a/b as a multiple of $1/b$. For example, use a visual fraction model to represent $5/4$ as the product $5 \times (1/4)$, recording the conclusion by the equation $5/4 = 5 \times (1/4)$. Understand a multiple of a/b as a multiple of $1/b$, and use this understanding to multiply a fraction by a whole number. For example, use a visual fraction model to express $3 \times (2/5)$ as $6 \times (1/5)$, recognizing this product as $6/5$. (In general, $n \times (a/b) = (n \times a)/b$.) Solve word problems involving multiplication of a fraction by a whole number, e.g., by using visual fraction models and equations to represent the problem. For example, if each person at a party will eat $3/8$ of a pound of roast beef, and there will be 5 people at the party, how many pounds of roast beef will be needed? Between what two whole numbers does your

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 4 Modules ⁶⁶
	<p>answer lie?</p> <p>Solve problems involving measurement and conversion of measurements from a larger unit to a smaller unit.⁷⁴</p> <p>4.MD.2 Use the four operations to solve word problems involving distances, intervals of time, liquid volumes, masses of objects, and money, including problems involving simple fractions or decimals, and problems that require expressing measurements given in a larger unit in terms of a smaller unit. Represent measurement quantities using diagrams such as number line diagrams that feature a measurement scale.</p> <p>Represent and interpret data.</p> <p>4.MD.4 Make a line plot to display a data set of measurements in fractions of a unit ($\frac{1}{2}$, $\frac{1}{4}$, $\frac{1}{8}$). Solve problems involving addition and subtraction of fractions by using information presented in line plots. <i>For example, from a line plot find and interpret the difference in length between the longest and shortest specimens in an insect collection.</i></p>
<p>Module 6:</p> <p>Decimal Fractions</p> <p>(20 days)</p>	<p>Understand decimal notations for fractions, and compare decimal fractions. (Grade 4 expectations in this domain are limited to fractions with denominators 2, 3, 4, 5, 6, 8, 10, 12, and 100.)⁷⁵</p> <p>4.NF.5 Express a fraction with denominator 10 as an equivalent fraction with denominator 100, and use this technique to add two fractions with respective denominators 10 and 100. (Students who can generate equivalent fractions can develop strategies for adding fractions with unlike denominators in general. But addition and subtraction with unlike denominators in general is not a requirement at this grade.) <i>For example, express $\frac{3}{10}$ as $\frac{30}{100}$, and add $\frac{3}{10} + \frac{4}{100} = \frac{34}{100}$.</i></p> <p>4.NF.6 Use decimal notation for fractions with denominators 10 or 100. <i>For example, rewrite 0.62 as $\frac{62}{100}$; describe a length as 0.62 meters; locate 0.62 on a number line diagram.</i></p> <p>4.NF.7 Compare two decimals to hundredths by reasoning about their size. Recognize that comparisons</p>

⁷⁴ 4.MD.1 is taught in Modules 2 and 7. 4.MD.3 is taught in Module 3.

⁷⁵ In this module we continue to work with fractions, now including decimal form.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 4 Modules ⁶⁶
	<p>are valid only when the two decimals refer to the same whole. Record the results of comparisons with the symbols $>$, $=$, or $<$, and justify the conclusions, e.g., by using a visual model.</p> <p>Solve problems involving measurement and conversion of measurements from a larger unit to a smaller unit.⁷⁶</p> <p>4.MD.2 Use the four operations to solve word problems involving distances, intervals of time, liquid volumes, masses of objects, and money, including problems involving simple fractions or decimals, and problems that require expressing measurements given in a larger unit in terms of a smaller unit. Represent measurement quantities using diagrams such as number line diagrams that feature a measurement scale.</p>
<p>Module 7: Exploring Multiplication (20 days)</p>	<p>Use the four operations with whole numbers to solve problems.</p> <p>4.OA.1 Interpret a multiplication equation as a comparison, e.g., interpret $35 = 5 \times 7$ as a statement that 35 is 5 times as many as 7 and 7 times as many as 5. Represent verbal statements of multiplicative comparisons as multiplication equations.</p> <p>4.OA.2 Multiply or divide to solve word problems involving multiplicative comparison, e.g., by using drawings and equations with a symbol for the unknown number to represent the problem, distinguishing multiplicative comparison from additive comparison. (See Glossary, Table 2.)</p> <p>4.OA.3 Solve multistep word problems posed with whole numbers and having whole-number answers using the four operations, including problems in which remainders must be interpreted. Represent these problems using equations with a letter standing for the unknown quantity. Assess the reasonableness of answers using mental computation and estimation strategies including rounding.</p> <p>Use place value understanding and properties of operations to perform multi-digit arithmetic.⁷⁷</p> <p>4.NBT.5 Multiply a whole number of up to four digits by a one-digit whole number, and multiply two two-digit numbers, using strategies based on place value and the properties of operations. Illustrate</p>

⁷⁶ 4.MD.1 is taught in Modules 2 and 7. 4.MD.3 is taught in Module 3.

⁷⁷ In Module 7, the focus is on multiplying two 2-digit numbers.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 4 Modules ⁶⁶
	<p>and explain the calculation by using equations, rectangular arrays, and/or area models.</p> <p>Solve problems involving measurement and conversion of measurements from a larger unit to a smaller unit.⁷⁸</p> <p>4.MD.1 Know relative sizes of measurement units within one system of units including km, m, cm; kg, g; lb, oz.; l, ml; hr, min, sec. Within a single system of measurement, express measurements in a larger unit in terms of a smaller unit. Record measurement equivalents in a two-column table. <i>For example, know that 1 ft is 12 times as long as 1 in. Express the length of a 4 ft snake as 48 in. Generate a conversion table for feet and inches listing the number pairs (1, 12), (2, 24), (3, 36), ...</i></p> <p>4.MD.2 Use the four operations to solve word problems involving distances, intervals of time, liquid volumes, masses of objects, and money, including problems involving simple fractions or decimals, and problems that require expressing measurements given in a larger unit in terms of a smaller unit. Represent measurement quantities using diagrams such as number line diagrams that feature a measurement scale.</p>

⁷⁸ The focus now is on customary units in word problems for application of fraction concepts. 4.MD.3 is taught in Module 3.

Sequence of Grade 5 Modules Aligned with the Standards

Module 1: Place Value and Decimal Fractions

Module 2: Multi-Digit Whole Number and Decimal Fraction Operations

Module 3: Addition and Subtraction of Fractions

Module 4: Multiplication and Division of Fractions and Decimal Fractions

Module 5: Addition and Multiplication with Volume and Area

Module 6: Problem Solving with the Coordinate Plane

Summary of Year

Fifth grade mathematics is about (1) developing fluency with addition and subtraction of fractions, and developing understanding of the multiplication of fractions and of division of fractions in limited cases (unit fractions divided by whole numbers and whole numbers divided by unit fractions); (2) extending division to two-digit divisors, integrating decimal fractions into the place value system and developing understanding of operations with decimals to hundredths, and developing fluency with whole number and decimal operations; and (3) developing understanding of volume.

Key Areas of Focus for 3-5: Multiplication and division of whole numbers and fractions—concepts, skills, and problem solving

Required Fluency: 5.NBT.5 Multi-digit multiplication.

CCLS Major Emphasis Clusters

Number and Operations in Base Ten

- Understand the place value system.
- Perform operations with multi-digit whole numbers and with decimals to hundredths.

Number and Operations – Fractions

- Use equivalent fractions as a strategy to add and subtract fractions.
- Apply and extend previous understandings of multiplication and division to multiply and divide fractions.

Measurement and Data

- Geometric measurement: understand concepts of volume and relate volume to multiplication and to addition.

Rationale for Module Sequence in Grade 5

Students' experiences with the algorithms as ways to manipulate place value units in Grades 2-4 really begin to pay dividends in Grade 5. In Module 1, whole number patterns with number disks on the place value table are easily generalized to decimal numbers. As students work word problems with measurements in the metric system, where the same patterns occur, they begin to appreciate the value and the meaning of decimals. Students apply their work with place value to adding, subtracting, multiplying and dividing decimal numbers with tenths and hundredths.

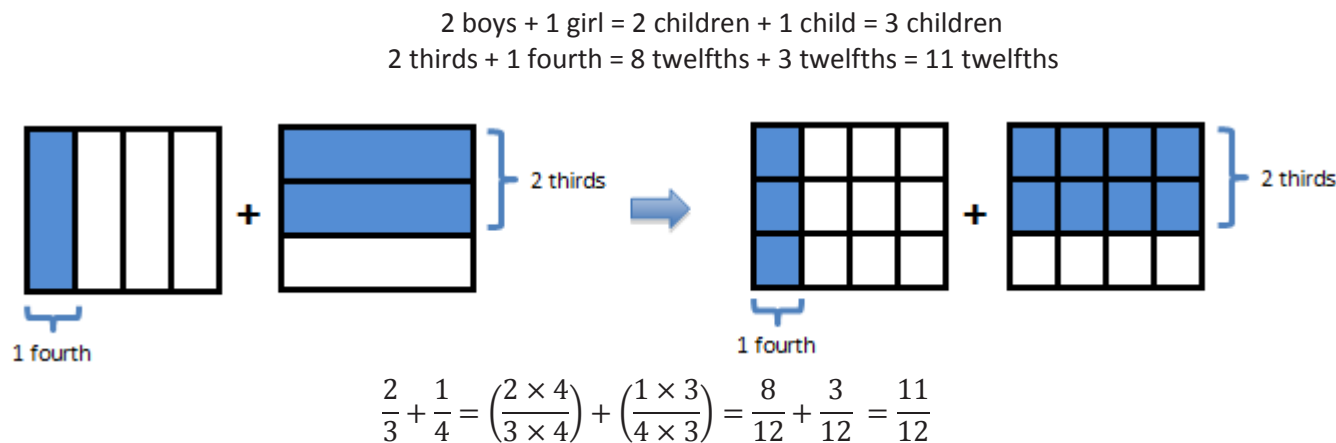
Module 2 begins by using place value patterns and the distributive and associative properties to multiply multi-digit numbers by multiples of 10 and leads to fluency with multi-digit whole number multiplication.⁷⁹ For multiplication, students must grapple with and fully understand the distributive property (one of the key reasons for teaching the multi-digit algorithm). While the multi-digit multiplication algorithm is a straightforward generalization of the one-digit multiplication algorithm, the division algorithm with two-digit divisors requires far more care to teach because students have to also learn estimation strategies, error correction strategies, and the idea of successive approximation (all of which are central concepts in math, science, and engineering).

Work with place value units paves the path toward fraction arithmetic in Module 3 as elementary math's place value emphasis shifts to the larger set of fractional units for algebra. Like units are added to and subtracted from like units:

$$1.5 + 0.8 = 1\frac{5}{10} + \frac{8}{10} = 15 \text{ tenths} + 8 \text{ tenths} = 23 \text{ tenths} = 2 \text{ and } 3 \text{ tenths} = 2\frac{3}{10} = 2.3$$

$$1\frac{5}{9} + \frac{8}{9} = 14 \text{ ninths} + 8 \text{ ninths} = 22 \text{ ninths} = 2 \text{ and } 4 \text{ ninths} = 2\frac{4}{9}$$

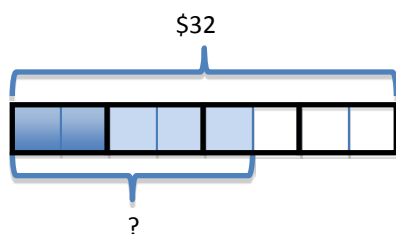
The new complexity is that when units are not equivalent, they must be changed for smaller equal units so that they can be added or subtracted. Probably the best model for showing this is the rectangular fraction model pictured below. The equivalence is then represented symbolically as students engage in active meaning-making rather than obeying the perhaps mysterious command to “multiply the top and bottom by the same number.”



⁷⁹ Multi-digit decimal multiplication such as 4.1×3.4 and division such as $4.5 \div 1.5$ are studied in Module 4.

Relating different fractional units to one another requires extensive work with area and number line diagrams. Tape diagrams are used often in word problems. Tape diagrams, which students began using in the early grades and which become increasingly useful as students applied them to a greater variety of word problems, hit their full strength as a model when applied to fraction word problems. At the heart of a tape diagram is the now-familiar idea of forming units. In fact, forming units to solve word problems is one of the most powerful examples of the unit theme and is particularly helpful for understanding fraction arithmetic, as in the following example:

Jill had \$32. She gave $\frac{1}{4}$ of her money to charity and $\frac{3}{8}$ of her money to her brother. How much did she give altogether?



Solution with units:

8 units = \$32
1 unit = \$4
5 units = \$20

Solution with arithmetic:

$$\frac{1}{4} + \frac{3}{8} = \frac{2}{8} + \frac{3}{8} = \frac{5}{8}$$

$$\frac{5}{8} \times 32 = 20$$

Jill gave \$20 altogether.

Near the end of Module 4 students know enough about fractions and whole number operations to begin to explore multi-digit decimal multiplication and division. In multiplying 2.1×3.8 , for example, students now have multiple skills and strategies that they can use to locate the decimal point in the final answer, including:

- Unit awareness: $2.1 \times 3.8 = 21 \text{ tenths} \times 38 \text{ tenths} = 798 \text{ hundredths}$
- Estimation (through rounding): $2.1 \times 3.8 \approx 2 \times 4 = 8$, so $2.1 \times 3.8 = 7.98$
- Fraction multiplication: $21/10 \times 38/10 = (21 \times 38)/(10 \times 10)$

Similar strategies enrich students' understanding of division and help them to see multi-digit decimal division as whole number division in a different unit. For example, we divide to find, "How many groups of 3 apples are there in 45 apples?" and write $45 \text{ apples} \div 3 \text{ apples} = 15$. Similarly, $4.5 \div 0.3$ can be written as "45 tenths \div 3 tenths" with the same answer: There are 15 groups of 0.3 in 4.5. This idea was used to introduce fraction division earlier in the module, thus gluing division to whole numbers, fractions and decimals together through an understanding of units.

Frequent use of the area model in Modules 3 and 4 prepares students for an in-depth discussion of area and volume in Module 5. But the module on area and volume also reinforces work done in the fraction module: Now, questions about how the area changes when a rectangle is scaled by a whole or fractional scale factor may be asked and missing fractional sides may be found. Measuring volume once again highlights the unit theme, as a unit cube is chosen to represent a volume unit and used to measure the volume of simple shapes composed out of rectangular prisms.

Scaling is revisited in the last module on the coordinate plane. Since Kindergarten where growth and shrinking patterns were first introduced, students have been using bar graphs to display data and patterns. Extensive bar-graph work has set the stage for line plots, which are both the natural extension of bar graphs and the precursor to linear functions. It is in this final module of K-5 that a simple line plot of a straight line is presented on a coordinate plane and students are asked about the scaling relationship between the increase in the units of the vertical axis for 1 unit of increase in the horizontal axis. This is the first hint of slope and marks the beginning of the major theme of middle school: ratios and proportions.

Alignment Chart

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 5 Modules ⁸⁰
Module 1: Place Value and Decimal Fractions (20 days)	<p>Understand the place value system.</p> <p>5.NBT.1 Recognize that in a multi-digit number, a digit in one place represents 10 times as much as it represents in the place to its right and 1/10 of what it represents in the place to its left.</p> <p>5.NBT.2 Explain patterns in the number of zeros of the product when multiplying a number by powers of 10, and explain patterns in the placement of the decimal point when a decimal is multiplied or divided by a power of 10. Use whole-number exponents to denote powers of 10.</p> <p>5.NBT.3 Read, write, and compare decimals to thousandths.</p> <p>a. Read and write decimals to thousandths using base-ten numerals, number names, and expanded form, e.g., $347.392 = 3 \times 100 + 4 \times 10 + 7 \times 1 + 3 \times (1/10) + 9 \times (1/100) + 2 \times (1/1000)$.</p> <p>b. Compare two decimals to thousandths based on meanings of the digits in each place, using $>$, $=$, and $<$ symbols to record the results of comparisons.</p> <p>5.NBT.4 Use place value understanding to round decimals to any place.</p> <p>Perform operations with multi-digit whole numbers and with decimals to hundredths.⁸²</p> <p>5.NBT.7 Add, subtract, multiply, and divide decimals to hundredths, using concrete models or drawings and strategies based on place value, properties of operations, and/or the relationship between</p>

⁸⁰ When a cluster is referred to in this chart without a footnote, the cluster is taught in its entirety.

⁸² The balance of this cluster is addressed in Module X.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 5 Modules ⁸⁰
	<p>addition and subtraction; relate the strategy to a written method and explain the reasoning used.</p> <p>Convert like measurement units within a given measurement system.⁸³</p> <p>5.MD.1 Convert among different-sized standard measurement units within a given measurement system (e.g., convert 5 cm to 0.05 m), and use these conversions in solving multi-step, real world problems.</p>
<p>Module 2:</p> <p>Multi-Digit Whole Number and Decimal Fraction Operations</p> <p>(35 days)</p>	<p>Write and interpret numerical expressions.⁸⁴</p> <p>5.OA.1 Use parentheses, brackets, or braces in numerical expressions, and evaluate expressions with these symbols.</p> <p>5.OA.2 Write simple expressions that record calculations with numbers, and interpret numerical expressions without evaluating them. <i>For example, express the calculation “add 8 and 7, then multiply by 2” as $2 \times (8 + 7)$. Recognize that $3 \times (18932 + 921)$ is three times as large as $18932 + 921$, without having to calculate the indicated sum or product.</i></p> <p>Understand the place value system.⁸⁵</p> <p>5.NBT.1 Recognize that in a multi-digit number, a digit in one place represents 10 times as much as it represents in the place to its right and 1/10 of what it represents in the place to its left.</p> <p>5.NBT.2 Explain patterns in the number of zeros of the product when multiplying a number by powers of 10, and explain patterns in the placement of the decimal point when a decimal is multiplied or divided by a power of 10. Use whole-number exponents to denote powers of 10.</p> <p>Perform operations with multi-digit whole numbers and with decimals to hundredths.</p> <p>5.NBT.5 Fluently multiply multi-digit whole numbers using the standard algorithm.</p> <p>5.NBT.6 Find whole-number quotients of whole numbers with up to four-digit dividends and two-digit</p>

⁸³ The focus of this module is on the metric system to reinforce place value and writing measurements using mixed units.

⁸⁴ These skills are also applied to fractions in this module.

⁸⁵ 5.NBT.3 and 5.NBT.4 are taught in Module 1.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 5 Modules ⁸⁰
	<p>divisors, using strategies based on place value, the properties of operations, and/or the relationship between multiplication and division. Illustrate and explain the calculation by using equations, rectangular arrays, and/or area models.</p> <p>5.NBT.7 Add, subtract, multiply, and divide decimals to hundredths, using concrete models or drawings and strategies based on place value, properties of operations, and/or the relationship between addition and subtraction; relate the strategy to a written method and explain the reasoning used.⁸⁶</p> <p>Convert like measurement units within a given measurement system.</p> <p>5.MD.1 Convert among different-sized standard measurement units within a given measurement system (e.g., convert 5 cm to 0.05 m), and use these conversions in solving multi-step, real world problems.</p>
<p>Module 3: Addition and Subtraction of Fractions (22 days)</p>	<p>Use equivalent fractions as a strategy to add and subtract fractions.⁸⁷</p> <p>5.NF.1 Add and subtract fractions with unlike denominators (including mixed numbers) by replacing given fractions with equivalent fractions in such a way as to produce an equivalent sum or difference of fractions with like denominators. <i>For example, $2/3 + 5/4 = 8/12 + 15/12 = 23/12$. (In general, $a/b + c/d = (ad + bc)/bd$.)</i></p> <p>5.NF.2 Solve word problems involving addition and subtraction of fractions referring to the same whole, including cases of unlike denominators, e.g., by using visual fraction models or equations to represent the problem. Use benchmark fractions and number sense of fractions to estimate mentally and assess the reasonableness of answers. <i>For example, recognize an incorrect result $2/5 + 1/2 = 3/7$, by observing that $3/7 < 1/2$.</i></p>
<p>Module 4: Multiplication and Division of</p>	<p>Write and interpret numerical expressions.</p> <p>5.OA.1 Use parentheses, brackets, or braces in numerical expressions, and evaluate expressions with</p>

⁸⁶ Focus on decimal multiplication of a single-digit, whole number factor times a multi-digit number with up to 2 decimal places (e.g., 3×64.98). Restrict decimal division to a single digit whole number divisor with a multi-digit dividend with up to 2 decimal places (e.g., $64.98 \div 3$). The balance of the standard is taught in Module 4.

⁸⁷ Examples in this module also include tenths and hundredths in fraction and decimal form.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 5 Modules ⁸⁰
Fractions and Decimal Fractions (38 days)	<p>these symbols.</p> <p>5.OA.2 Write simple expressions that record calculations with numbers, and interpret numerical expressions without evaluating them. <i>For example, express the calculation “add 8 and 7, then multiply by 2” as $2 \times (8 + 7)$. Recognize that $3 \times (18932 + 921)$ is three times as large as $18932 + 921$, without having to calculate the indicated sum or product.</i></p> <p>Perform operations with multi-digit whole numbers and with decimals to hundredths.⁸⁸</p> <p>5.NBT.7 Add, subtract, multiply, and divide decimals to hundredths, using concrete models or drawings and strategies based on place value, properties of operations, and/or the relationship between addition and subtraction; relate the strategy to a written method and explain the reasoning used.</p> <p>Apply and extend previous understandings of multiplication and division to multiply and divide fractions.⁸⁹</p> <p>5.NF.3 Interpret a fraction as division of the numerator by the denominator ($a/b = a \div b$). Solve word problems involving division of whole numbers leading to answers in the form of fractions or mixed numbers, e.g., by using visual fraction models or equations to represent the problem. <i>For example, interpret $3/4$ as the result of dividing 3 by 4, noting that $3/4$ multiplied by 4 equals 3, and that when 3 wholes are shared equally among 4 people each person has a share of size $3/4$. If 9 people want to share a 50-pound sack of rice equally by weight, how many pounds of rice should each person get? Between what two whole numbers does your answer lie?</i></p> <p>5.NF.4 Apply and extend previous understandings of multiplication to multiply a fraction or whole number by a fraction.</p> <p>a. Interpret the product $(a/b) \times q$ as a parts of a partition of q into b equal parts; equivalently, as the result of a sequence of operations $a \times q \div b$. <i>For example, use a visual fraction model to show $(2/3) \times 4 = 8/3$, and create a story context for this equation. Do the same with $(2/3) \times (4/5) = 8/15$. (In general, $(a/b) \times (c/d) = ac/bd$.)</i></p>

⁸⁸ 5.NBT.5 and 5.NBT.6 are taught in Module 2. Teach problems such as 2.7×2.1 and $4.5 \div 1.5$. See “Progressions” pgs. 17 – 18 (http://commoncoretools.files.wordpress.com/2011/04/ccss_progression_nbt_2011_04_073.pdf).

⁸⁹ The focus of 5.NF.4 in this module is only on part a; 5.NF.4b is taught in Module 5. Include problems involving decimal fractions throughout the cluster.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 5 Modules ⁸⁰
	<p>5.NF.5 Interpret multiplication as scaling (resizing), by:</p> <ul style="list-style-type: none"> a. Comparing the size of a product to the size of one factor on the basis of the size of the other factor, without performing the indicated multiplication. b. Explaining why multiplying a given number by a fraction greater than 1 results in a product greater than the given number (recognizing multiplication by whole numbers greater than 1 as a familiar case); explaining why multiplying a given number by a fraction less than 1 results in a product smaller than the given number; and relating the principle of fraction equivalence $a/b = (n \times a)/(n \times b)$ to the effect of multiplying a/b by 1. <p>5.NF.6 Solve real world problems involving multiplication of fractions and mixed numbers, e.g., by using visual fraction models or equations to represent the problem.</p> <p>5.NF.7 Apply and extend previous understandings of division to divide unit fractions by whole numbers and whole numbers by unit fractions. (Students able to multiply fractions in general can develop strategies to divide fractions in general, by reasoning about the relationship between multiplication and division. But division of a fraction by a fraction is not a requirement at this grade.)</p> <ul style="list-style-type: none"> a. Interpret division of a unit fraction by a non-zero whole number, and compute such quotients. For example, create a story context for $(1/3) \div 4$, and use a visual fraction model to show the quotient. Use the relationship between multiplication and division to explain that $(1/3) \div 4 = 1/12$ because $(1/12) \times 4 = 1/3$. b. Interpret division of a whole number by a unit fraction, and compute such quotients. For example, create a story context for $4 \div (1/5)$, and use a visual fraction model to show the quotient. Use the relationship between multiplication and division to explain that $4 \div (1/5) = 20$ because $20 \times (1/5) = 4$. c. Solve real world problems involving division of unit fractions by non-zero whole numbers and division of whole numbers by unit fractions, e.g., by using visual fraction models and equations to represent the problem. <i>For example, how much chocolate will each person get if 3 people share $1/2$ lb of chocolate equally? How many $1/3$-cup servings are in 2 cups of</i>

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 5 Modules ⁸⁰
	<p><i>raisins?</i></p> <p>Convert like measurement units within a given measurement system.⁹⁰</p> <p>5.MD.1 Convert among different-sized standard measurement units within a given measurement system (e.g., convert 5 cm to 0.05 m), and use these conversions in solving multi-step, real world problems.</p> <p>Represent and interpret data.</p> <p>5.MD.2 Make a line plot to display a data set of measurements in fractions of a unit ($\frac{1}{2}$, $\frac{1}{4}$, $\frac{1}{8}$). Use operations on fractions for this grade to solve problems involving information presented in line plots. <i>For example, given different measurements of liquid in identical beakers, find the amount of liquid each beaker would contain if the total amount in all the beakers were redistributed equally.</i></p>
<p>Module 5: Addition and Multiplication with Volume and Area (25 days)</p>	<p>Apply and extend previous understandings of multiplication and division to multiply and divide fractions.⁹¹</p> <p>5.NF.4 Apply and extend previous understandings of multiplication to multiply a fraction or whole number by a fraction.</p> <p>b. Find the area of a rectangle with fractional side lengths by tiling it with unit squares of the appropriate unit fraction side lengths, and show that the area is the same as would be found by multiplying the side lengths. Multiply fractional side lengths to find areas of rectangles, and represent fraction products as rectangular areas.</p> <p>Geometric measurement: understand concepts of volume and relate volume to multiplication and to addition.</p> <p>5.MD.3 Recognize volume as an attribute of solid figures and understand concepts of volume measurement.</p>

⁹⁰ The focus of 5.MD.1 in this module is on the customary system of units as a means of introducing fractions (e.g., 1 inch is $\frac{1}{12}$ foot, 1 foot is $\frac{1}{3}$ yard, etc.).

⁹¹ 5.NF.3 is taught in Module 3; 5.NF.4a, 5.NF.5, 5.NF.6, and 5.NF.7 are taught in Module 4. In this module 5.NF.4b is applied to multiplying to find volume and area. 5.NF.4b certainly includes decimal fraction side lengths of sides of a rectangle (in both fraction and decimal form).

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 5 Modules ⁸⁰
	<ul style="list-style-type: none"> a. A cube with side length 1 unit, called a “unit cube,” is said to have “one cubic unit” of volume, and can be used to measure volume. b. A solid figure which can be packed without gaps or overlaps using n unit cubes is said to have a volume of n cubic units. <p>5.MD.4 Measure volumes by counting unit cubes, using cubic cm, cubic in, cubic ft, and improvised units.</p> <p>5.MD.5 Relate volume to the operations of multiplication and addition and solve real world and mathematical problems involving volume.</p> <ul style="list-style-type: none"> a. Find the volume of a right rectangular prism with whole-number side lengths by packing it with unit cubes, and show that the volume is the same as would be found by multiplying the edge lengths, equivalently by multiplying the height by the area of the base. Represent threefold whole-number products as volumes, e.g., to represent the associative property of multiplication. b. Apply the formulas $V = l \times w \times h$ and $V = b \times h$ for rectangular prisms to find volumes of right rectangular prisms with whole-number edge lengths in the context of solving real world and mathematical problems. c. Recognize volume as additive. Find volumes of solid figures composed of two non-overlapping right rectangular prisms by adding the volumes of the non-overlapping parts, applying this technique to solve real world problems. <p>Classify two-dimensional figures into categories based on their properties.</p> <p>5.G.3 Understand that attributes belonging to a category of two-dimensional figures also belong to all subcategories of that category. For example, all rectangles have four right angles and squares are rectangles, so all squares have four right angles.</p> <p>5.G.4 Classify two-dimensional figures in a hierarchy based on properties.</p>

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 5 Modules ⁸⁰
Module 6: Problem Solving with the Coordinate Plane (40 days)	<p>Write and interpret numerical expressions.⁹²</p> <p>5.OA.2 Write simple expressions that record calculations with numbers, and interpret numerical expressions without evaluating them. <i>For example, express the calculation “add 8 and 7, then multiply by 2” as $2 \times (8 + 7)$. Recognize that $3 \times (18932 + 921)$ is three times as large as $18932 + 921$, without having to calculate the indicated sum or product.</i></p> <p>Analyze patterns and relationships.</p> <p>5.OA.3 Generate two numerical patterns using two given rules. Identify apparent relationships between corresponding terms. Form ordered pairs consisting of corresponding terms from the two patterns, and graph the ordered pairs on a coordinate plane. <i>For example, given the rule “Add 3” and the starting number 0, and given the rule “Add 6” and the starting number 0, generate terms in the resulting sequences, and observe that the terms in one sequence are twice the corresponding terms in the other sequence. Explain informally why this is so.</i></p> <p>Graph points on the coordinate plane to solve real-world and mathematical problems.</p> <p>5.G.1 Use a pair of perpendicular number lines, called axes, to define a coordinate system, with the intersection of the lines (the origin) arranged to coincide with the 0 on each line and a given point in the plane located by using an ordered pair of numbers, called its coordinates. Understand that the first number indicates how far to travel from the origin in the direction of one axis, and the second number indicates how far to travel in the direction of the second axis, with the convention that the names of the two axes and the coordinates correspond (e.g., x-axis and x-coordinate, y-axis and y-coordinate).</p> <p>5.G.2 Represent real world and mathematical problems by graphing points in the first quadrant of the coordinate plane, and interpret coordinate values of points in the context of the situation.</p>

⁹² 5.OA.1 is taught in Modules 2 and 4.



A Story of Ratios: A Curriculum Overview for Grades 6-8

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Introduction

This document provides an overview of the academic year for Grades 6 through 8, beginning with a curriculum map and followed by detailed grade level descriptions.

The curriculum map is a chart that shows, at a glance, the sequence of modules comprising each grade of the Grades 6 through 8 curriculums. The map also indicates the approximate number of instructional days designated for each module of each grade. The date approximations are based on an academic calendar beginning on 9/6/12 and ending on 6/26/13 with a testing date approximately mid-late April. Details that elaborate on the curriculum map are found in the grade-level descriptions.

Each grade-level description begins with a list of the five to seven modules that comprise the instruction of that grade. That introductory component is followed by three sections: the Summary of Year, the Rationale for Module Sequence, and the alignment chart with the grade-level standards.

The “Summary of Year” portion of each grade level includes four pieces of information:

- The critical instructional areas for the grade, as described in the Common Core Learning Standards¹ (CCLS)
- The Key Areas of Focus² for the grade
- The Required Fluencies for the grade
- The CCLS Major Emphasis Clusters³ for the grade

The “Rationale for Module Sequence” portion of each grade level provides a brief description of the instructional focus of each module for that grade and explains the developmental sequence of the mathematics.

The alignment chart for each grade lists the CCLS that are addressed in each module of the grade. Note that when a cluster is referred to without a footnote, it is taught in its entirety. There are also times when footnotes are relevant to particular standards within a cluster. All standards for each grade have been carefully included in the module sequence. Some standards are deliberately included in more than one module, so that a strong foundation can be built over time. Note that the standards identified on the Pre-Post Standards⁴ document as those which should be taught after the state test in April, have been intentionally aligned with the final modules of those grades.

¹ EngageNY: http://www.p12.nysed.gov/ciai/common_core_standards/pdfdocs/nysp12cclsmath.pdf

² Achievethecore: http://www.achievethecore.org/downloads/E0702_Description_of_the_Common_Core_Shifts.pdf

³ EngageNY: <http://engageny.org/sites/default/files/resource/attachments/nys-math-emphases-k-hs.pdf>

⁴ NYSED: <http://www.p12.nysed.gov/assessment/ei/2013/draft-math-ccls-13.pdf>

	Grade 6	Grade 7	Grade 8	
20 days	M1: Ratios and Unit Rates (35 days)	M1: Ratios and Proportional Relationships (30 days)	M1: Integer Exponents and the Scientific Notation (20 days)	20 days
20 days		M2: Rational Numbers (30 days)	M2: The Concept of Congruence (25 days)	20 days
20 days	M2: Arithmetic Operations Including Dividing by a Fraction (25 days)		M3: Similarity (25 days)	20 days
20 days	M3: Rational Numbers (25 days)	M3: Expressions and Equations (35 days)	M4: Linear Equations (40 days)	20 days
20 days	M4: Expressions and Equations (45 days)			M4: Percent and Proportional Relationships (25 days)
20 days		M5: Statistics and Probability (25 days)	M5: Examples of Functions from Geometry (15 days)	20 days
20 days		M5: Area, Surface Area, and Volume Problems (25 days)	M6: Geometry (35 days)	M6: Linear Functions (20 days)
20 days	M6: Statistics (25 days)	M7: Introduction to Irrational Numbers Using Geometry (35 days)		
20 days				

Approx. test
date for
Grades 6-8

Key:	Number	Geometry	Ratios and Proportions	Expressions and Equations	Statistics and Probability	Functions
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Sequence of Grade 6 Modules Aligned with the Standards

Module 1: Ratios and Unit Rates

Module 2: Arithmetic Operations Including Dividing by a Fraction

Module 3: Rational Numbers

Module 4: Expressions and Equations

Module 5: Area, Surface Area, and Volume Problems

Module 6: Statistics

Summary of Year

Sixth grade mathematics is about (1) connecting ratio and rate to whole number multiplication and division and using concepts of ratio and rate to solve problems; (2) completing understanding of division of fractions and extending the notion of number to the system of rational numbers, which includes negative numbers; (3) writing, interpreting, and using expressions and equations; and (4) developing understanding of statistical thinking.

Key Areas of Focus for Grade 6: Ratios and proportional reasoning; early expressions and equations

Required Fluency:

6.NS.2	Multi-digit division
6.NS.3	Multi-digit decimal operations

CCLS Major Emphasis Clusters

Ratios and Proportional Relationships

- Understand ratio concepts and use ratio reasoning to solve problems.

The Number System

- Apply and extend previous understandings of multiplication and division to divide fractions by fractions.
- Apply and extend previous understandings of numbers to the system of rational numbers.

Expressions and Equations

- Apply and extend previous understandings of arithmetic to algebraic expressions.
- Reason about and solve one-variable equations and inequalities.
- Represent and analyze quantitative relationships between dependent and independent variables.

Rationale for Module Sequence in Grade 6

In Module 1, students build on their prior work in measurement and in multiplication and division as they study the concepts and language of ratios and unit rates. They use proportional reasoning to solve problems. In particular, students solve ratio and rate using tape diagrams, tables of equivalent ratios, double number line diagrams, and equations. They plot pairs of values generated from a ratio or rate on the first quadrant of the coordinate plane.

Students expand their understanding of the number system and build their fluency in arithmetic operations in Module 2. Students learned in Grade 5 to divide whole numbers by unit fractions and unit fractions by whole numbers. Now, they apply and extend their understanding of multiplication and division to divide fractions by fractions. The meaning of this operation is connected to real-world problems as students are asked to create and solve fraction division word problems. Students continue (from Fifth Grade) to build fluency with adding, subtracting, multiplying, and dividing multi-digit decimal numbers using the standard algorithms.

Major themes of Module 3 are to understand rational numbers as points on the number line and to extend previous understandings of numbers to the system of rational numbers, which now include negative numbers. Students extend coordinate axes to represent points in the plane with negative number coordinates and, as part of doing so, see that negative numbers can represent quantities in real-world contexts. They use the number line to order numbers and to understand the absolute value of a number. They begin to solve real-world and mathematical problems by graphing points in all four quadrants, a concept that continues throughout to be used into high school and beyond.

With their sense of number expanded to include negative numbers, in Module 4 students begin formal study of algebraic expressions and equations. Students learn equivalent expressions by continuously relating algebraic expressions back to arithmetic and the properties of arithmetic (commutative, associative, and distributive). They write, interpret, and use expressions and equations as they reason about and solve one-variable equations and inequalities and analyze quantitative relationships between two variables.

Module 5 is an opportunity to practice the material learned in Module 4 in the context of geometry; students apply their newly acquired capabilities with expressions and equations to solve for unknowns in area, surface area, and volume problems. They find the area of triangles and other two-dimensional figures and use the formulas to find the volumes of right rectangular prisms with fractional edge lengths. Students use negative numbers in coordinates as they draw lines and polygons in the coordinate plane. They also find the lengths of sides of figures, joining points with the same first coordinate or the same second coordinate and apply these techniques to solve real-world and mathematical problems.

In Module 6, students develop an understanding of statistical variability and apply that understanding as they summarize, describe, and display distributions. In particular, careful attention is given to measures of center and variability.

Alignment Chart

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 6 Modules ⁵
Module 1: Ratios and Unit Rates (35 days)	<p>Understand ratio concepts and use ratio reasoning to solve problems.</p> <p>6.RP.1 Understand the concept of a ratio and use ratio language to describe a ratio relationship between two quantities. <i>For example, “The ratio of wings to beaks in the bird house at the zoo was 2:1, because for every 2 wings there was 1 beak.” “For every vote candidate A received, candidate C received nearly three votes.”</i></p> <p>6.RP.2 Understand the concept of a unit rate a/b associated with a ratio $a:b$ with $b \neq 0$, and use rate language in the context of a ratio relationship. <i>For example, “This recipe has a ratio of 3 cups of flour to 4 cups of sugar, so there is $3/4$ cup of flour for each cup of sugar.” “We paid \$75 for 15 hamburgers, which is a rate of \$5 per hamburger.”⁶</i></p> <p>6.RP.3 Use ratio and rate reasoning to solve real-world and mathematical problems, e.g., by reasoning about tables of equivalent ratios, tape diagrams, double number line diagrams, or equations.</p> <ol style="list-style-type: none"> Make tables of equivalent ratios relating quantities with whole-number measurements, find missing values in the tables, and plot the pairs of values on the coordinate plane. Use tables to compare ratios. Solve unit rate problems including those involving unit pricing and constant speed. <i>For example, if it took 7 hours to mow 4 lawns, then at that rate, how many lawns could be mowed in 35 hours? At what rate were lawns being mowed?</i> Find a percent of a quantity as a rate per 100 (e.g., 30% of a quantity means $30/100$ times the quantity); solve problems involving finding the whole, given a part and the percent. Use ratio reasoning to convert measurement units; manipulate and transform units appropriately when multiplying or dividing quantities.

⁵ When a cluster is referred to in this chart without a footnote, the cluster is taught in its entirety.

⁶ Expectations for unit rates in this grade are limited to non-complex fractions.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 6 Modules ⁵
Module 2: Arithmetic Operations Including Dividing by a Fraction (25 days)	<p>Apply and extend previous understandings of multiplication and division to divide fractions by fractions.</p> <p>6.NS.1 Interpret and compute quotients of fractions, and solve word problems involving division of fractions by fractions, e.g., by using visual fraction models and equations to represent the problem. <i>For example, create a story context for $(2/3) \div (3/4)$ and use a visual fraction model to show the quotient; use the relationship between multiplication and division to explain that $(2/3) \div (3/4) = 8/9$ because $3/4$ of $8/9$ is $2/3$. (In general, $(a/b) \div (c/d) = ad/bc$.) How much chocolate will each person get if 3 people share $1/2$ lb of chocolate equally? How many $3/4$-cup servings are in $2/3$ of a cup of yogurt? How wide is a rectangular strip of land with length $3/4$ mi and area $1/2$ square mi?</i></p> <p>Compute fluently with multi-digit numbers and find common factors and multiples.</p> <p>6.NS.2 Fluently divide multi-digit numbers using the standard algorithm.⁷</p> <p>6.NS.3 Fluently add, subtract, multiply, and divide multi-digit decimals using the standard algorithm for each operation.⁸</p> <p>6.NS.4 Find the greatest common factor of two whole numbers less than or equal to 100 and the least common multiple of two whole numbers less than or equal to 12. Use the distributive property to express a sum of two whole numbers 1–100 with a common factor as a multiple of a sum of two whole numbers with no common factor. <i>For example, express $36 + 8$ as $4(9 + 2)$.</i></p>
Module 3: Rational Numbers (25 days)	<p>Apply and extend previous understandings of numbers to the system of rational numbers.</p> <p>6.NS.5 Understand that positive and negative numbers are used together to describe quantities having opposite directions or values (e.g., temperature above/below zero, elevation above/below sea level, credits/debits, positive/negative electric charge); use positive and negative numbers to represent quantities in real-world contexts, explaining the meaning of 0 in each situation.</p> <p>6.NS.6 Understand a rational number as a point on the number line. Extend number line diagrams and coordinate axes familiar from previous grades to represent points on the line and in the plane</p>

⁷ This fluency standard begins in this module and is practiced throughout the remainder of the year.

⁸ This fluency standard begins in this module and is practiced throughout the remainder of the year.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 6 Modules ⁵
	<p>with negative number coordinates.</p> <ul style="list-style-type: none"> a. Recognize opposite signs of numbers as indicating locations on opposite sides of 0 on the number line; recognize that the opposite of the opposite of a number is the number itself, e.g., $-(-3) = 3$, and that 0 is its own opposite. b. Understand signs of numbers in ordered pairs as indicating locations in quadrants of the coordinate plane; recognize that when two ordered pairs differ only by signs, the locations of the points are related by reflections across one or both axes. c. Find and position integers and other rational numbers on a horizontal or vertical number line diagram; find and position pairs of integers and other rational numbers on a coordinate plane. <p>6.NS.7 Understand ordering and absolute value of rational numbers.</p> <ul style="list-style-type: none"> a. Interpret statements of inequality as statements about the relative position of two numbers on a number line diagram. <i>For example, interpret $-3 > -7$ as a statement that -3 is located to the right of -7 on a number line oriented from left to right.</i> b. Write, interpret, and explain statements of order for rational numbers in real-world contexts. <i>For example, write $-3^{\circ}\text{C} > -7^{\circ}\text{C}$ to express the fact that -3°C is warmer than -7°C.</i> c. Understand the absolute value of a rational number as its distance from 0 on the number line; interpret absolute value as magnitude for a positive or negative quantity in a real-world situation. <i>For example, for an account balance of -30 dollars, write $-30 = 30$ to describe the size of the debt in dollars.</i> d. Distinguish comparisons of absolute value from statements about order. <i>For example, recognize that an account balance less than -30 dollars represents a debt greater than 30 dollars.</i> <p>6.NS.8 Solve real-world and mathematical problems by graphing points in all four quadrants of the coordinate plane. Include use of coordinates and absolute value to find distances between points with the same first coordinate or the same second coordinate.</p>

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 6 Modules ⁵
Module 4: Expressions and Equations (45 days)	<p>Apply and extend previous understandings of arithmetic to algebraic expressions.⁹</p> <p>6.EE.1 Write and evaluate numerical expressions involving whole-number exponents.</p> <p>6.EE.2 Write, read, and evaluate expressions in which letters stand for numbers.</p> <ol style="list-style-type: none"> Write expressions that record operations with numbers and with letters standing for numbers. <i>For example, express the calculation “Subtract y from 5” as $5 - y$.</i> Identify parts of an expression using mathematical terms (sum, term, product, factor, quotient, coefficient); view one or more parts of an expression as a single entity. <i>For example, describe the expression $2(8 + 7)$ as a product of two factors; view $(8 + 7)$ as both a single entity and a sum of two terms.</i> Evaluate expressions at specific values of their variables. Include expressions that arise from formulas used in real-world problems. Perform arithmetic operations, including those involving whole-number exponents, in the conventional order when there are no parentheses to specify a particular order (Order of Operations). <i>For example, use the formulas $V = s^3$ and $A = 6s^2$ to find the volume and surface area of a cube with sides of length $s = \frac{1}{2}$.</i> <p>6.EE.3 Apply the properties of operations to generate equivalent expressions. <i>For example, apply the distributive property to the expression $3(2 + x)$ to produce the equivalent expression $6 + 3x$; apply the distributive property to the expression $24x + 18y$ to produce the equivalent expression $6(4x + 3y)$; apply properties of operations to $y + y + y$ to produce the equivalent expression $3y$.</i></p> <p>6.EE.4 Identify when two expressions are equivalent (i.e., when the two expressions name the same number regardless of which value is substituted into them). <i>For example, the expressions $y + y + y$ and $3y$ are equivalent because they name the same number regardless of which number y stands for.</i></p>

⁹ 6.EE.2c is also taught in Module 4 in the context of geometry.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 6 Modules ⁵
	<p>Reason about and solve one-variable equations and inequalities.¹⁰</p> <p>6.EE.5 Understand solving an equation or inequality as a process of answering a question: Which values from a specified set, if any, make the equation or inequality true? Use substitution to determine whether a given number in a specified set makes an equation or inequality true.</p> <p>6.EE.6 Use variables to represent numbers and write expressions when solving a real-world or mathematical problem; understand that a variable can represent an unknown number, or, depending on the purpose at hand, any number in a specified set.</p> <p>6.EE.7 Solve real-world and mathematical problems by writing and solving equations of the form $x + p = q$ and $px = q$ for cases in which p, q, and x are all nonnegative rational numbers.</p> <p>6.EE.8 Write an inequality of the form $x > c$ or $x < c$ to represent a constraint or condition in a real-world or mathematical problem. Recognize that inequalities of the form $x > c$ or $x < c$ have infinitely many solutions; represent solutions of such inequalities on number line diagrams.</p> <p>Represent and analyze quantitative relationships between dependent and independent variables.</p> <p>6.EE.9 Use variables to represent two quantities in a real-world problem that change in relationship to one another; write an equation to express one quantity, thought of as the dependent variable, in terms of the other quantity, thought of as the independent variable. Analyze the relationship between the dependent and independent variables using graphs and tables, and relate these to the equation. <i>For example, in a problem involving motion at constant speed, list and graph ordered pairs of distances and times, and write the equation $d = 65t$ to represent the relationship between distance and time.</i></p>
<p>Module 5: Area, Surface Area, and Volume Problems (25 days)</p>	<p>Apply and extend previous understandings of arithmetic to algebraic expressions.¹¹</p> <p>6.EE.2 Write, read, and evaluate expressions in which letters stand for numbers.</p> <p>c. Evaluate expressions at specific values of their variables. Include expressions that arise from formulas used in real-world problems. Perform arithmetic operations, including those</p>

¹⁰ Except for 6.EE.8, this cluster is also taught in Module 4 in the context of geometry.

¹¹ This standard, taught in Module 4, is practiced in this module in the context of geometry.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 6 Modules ⁵
	<p>involving whole-number exponents, in the conventional order when there are no parentheses to specify a particular order (Order of Operations). <i>For example, use the formulas $V = s^3$ and $A = 6s^2$ to find the volume and surface area of a cube with sides of length $s = 1/2$.</i></p> <p>Reason about and solve one-variable equations and inequalities.¹²</p> <p>6.EE.5 Understand solving an equation or inequality as a process of answering a question: Which values from a specified set, if any, make the equation or inequality true? Use substitution to determine whether a given number in a specified set makes an equation or inequality true.</p> <p>6.EE.6 Use variables to represent numbers and write expressions when solving a real-world or mathematical problem; understand that a variable can represent an unknown number, or, depending on the purpose at hand, any number in a specified set.</p> <p>6.EE.7 Solve real-world and mathematical problems by writing and solving equations of the form $x + p = q$ and $px = q$ for cases in which p, q, and x are all nonnegative rational numbers.</p> <p>Solve real-world and mathematical problems involving area, surface area, and volume.</p> <p>6.G.1 Find the area of right triangles, other triangles, special quadrilaterals, and polygons by composing into rectangles or decomposing into triangles and other shapes; apply these techniques in the context of solving real-world and mathematical problems.</p> <p>6.G.2 Find the volume of a right rectangular prism with fractional edge lengths by packing it with unit cubes of the appropriate unit fraction edge lengths, and show that the volume is the same as would be found by multiplying the edge lengths of the prism. Apply the formulas $V = lwh$ and $V = bh$ to find volumes of right rectangular prisms with fractional edge lengths in the context of solving real-world and mathematical problems.</p> <p>6.G.3 Draw polygons in the coordinate plane given coordinates for the vertices; use coordinates to find the length of a side joining points with the same first coordinate or the same second coordinate. Apply these techniques in the context of solving real-world and mathematical problems.</p>

¹² These standards, taught in Module 4, are practiced in this module in the context of geometry.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 6 Modules ⁵
	<p>6.G.4 Represent three-dimensional figures using nets made up of rectangles and triangles, and use the nets to find the surface area of these figures. Apply these techniques in the context of solving real-world and mathematical problems.</p>
<p>Module 6: Statistics (25 days)</p>	<p>Develop understanding of statistical variability.</p> <p>6.SP.1 Recognize a statistical question as one that anticipates variability in the data related to the question and accounts for it in the answers. <i>For example, “How old am I?” is not a statistical question, but “How old are the students in my school?” is a statistical question because one anticipates variability in students’ ages.</i></p> <p>6.SP.2 Understand that a set of data collected to answer a statistical question has a distribution which can be described by its center, spread, and overall shape.</p> <p>6.SP.3 Recognize that a measure of center for a numerical data set summarizes all of its values with a single number, while a measure of variation describes how its values vary with a single number.</p> <p>Summarize and describe distributions.</p> <p>6.SP.4 Display numerical data in plots on a number line, including dot plots, histograms, and box plots.</p> <p>6.SP.5 Summarize numerical data sets in relation to their context, such as by:</p> <ol style="list-style-type: none"> Reporting the number of observations. Describing the nature of the attribute under investigation, including how it was measured and its units of measurement. Giving quantitative measures of center (median and/or mean) and variability (interquartile range and/or mean absolute deviation), as well as describing any overall pattern and any striking deviations from the overall pattern with reference to the context in which the data were gathered. Relating the choice of measures of center and variability to the shape of the data distribution and the context in which the data were gathered.

Sequence of Grade 7 Modules Aligned with the Standards

Module 1: Ratios and Proportional Relationships

Module 2: Rational Numbers

Module 3: Expressions and Equations

Module 4: Percent and Proportional Relationships

Module 5: Statistics and Probability

Module 6: Geometry

Summary of Year

Seventh grade mathematics is about (1) developing understanding of and applying proportional relationships; (2) developing understanding of operations with rational numbers and working with expressions and linear equations; (3) solving problems involving scale drawings and informal geometric constructions, and working with two- and three-dimensional shapes to solve problems involving area, surface area, and volume; and (4) drawing inferences about populations based on samples.

Key Areas of Focus for Grade 7: Ratios and proportional reasoning; arithmetic of rational numbers

Rationale for Module Sequence in Grade 7

In Module 1, students build on their Grade 6 experiences with ratios, unit rates, and fraction division to analyze proportional relationships. They decide whether two quantities are in a proportional relationship, identify constants of proportionality, and represent the relationship by equations. These skills are then applied to real-world problems including scale drawings.

Students continue to build an understanding of the number line in Module 2 from their work in Grade 6. They learn to add, subtract, multiply, and divide rational numbers. Module 2 includes rational numbers as they appear in expressions and equations—work that is continued in Module 3.

CCLS Major Emphasis Clusters

Ratios and Proportional Relationships

- Analyze proportional relationships and use them to solve real-world and mathematical problems.

The Number System

- Apply and extend previous understandings of operations with fractions to add, subtract, multiply, and divide rational numbers.

Expressions and Equations

- Use properties of operations to generate equivalent expressions.
- Solve real-life and mathematical problems using numerical and algebraic expressions and equations.

Module 3 consolidates and expands students' previous work with generating equivalent expressions and solving equations. Students solve real-life and mathematical problems using numerical and algebraic expressions and equations. Their work with expressions and equations is applied to finding unknown angles and problems involving area, volume, and surface area.

Module 4 parallels Module 1's coverage of ratio and proportion, but this time with a concentration on percent. Problems in this module include simple interest, tax, markups and markdowns, gratuities and commissions, fees, percent increase and decrease, and percent error. Additionally, this module includes percent problems about populations, which prepare students for probability models about populations covered in the next module.

In Module 5, students learn to draw inferences about populations based on random samples. Through the study of chance processes, students learn to develop, use and evaluate probability models.

The year concludes with students drawing and constructing geometrical figures in Module 6. They also revisit unknown angle, area, volume, and surface area problems, which now include problems involving percentages of areas or volumes.

Alignment Chart

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 7 Modules ¹³
Module 1: Ratios and Proportional Relationships (30 days)	Analyze proportional relationships and use them to solve real-world and mathematical problems.¹⁴ <p>7.RP.1 Compute unit rates associated with ratios of fractions, including ratios of lengths, areas and other quantities measured in like or different units. <i>For example, if a person walks $\frac{1}{2}$ mile in each $\frac{1}{4}$ hour, compute the unit rate as the complex fraction $\frac{1/2}{1/4}$ miles per hour, equivalently 2 miles per hour.</i></p> <p>7.RP.2 Recognize and represent proportional relationships between quantities.</p> <p>a. Decide whether two quantities are in a proportional relationship, e.g., by testing for equivalent ratios in a table or graphing on a coordinate plane and observing whether the graph is a straight line through the origin.</p>

¹³ When a cluster is referred to in this chart without a footnote, the cluster is taught in its entirety.

¹⁴ Percent and proportional relationships are covered in Module 4.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 7 Modules ¹³
	<p>b. Identify the constant of proportionality (unit rate) in tables, graphs, equations, diagrams, and verbal descriptions of proportional relationships.</p> <p>c. Represent proportional relationships by equations. <i>For example, if total cost t is proportional to the number n of items purchased at a constant price p, the relationship between the total cost and the number of items can be expressed as $t = pn$.</i></p> <p>d. Explain what a point (x, y) on the graph of a proportional relationship means in terms of the situation, with special attention to the points $(0, 0)$ and $(1, r)$ where r is the unit rate.</p> <p>7.RP.3 Use proportional relationships to solve multistep ratio and percent problems. <i>Examples: simple interest, tax, markups and markdowns, gratuities and commissions, fees, percent increase and decrease, percent error.</i></p> <p>Solve real-life and mathematical problems using numerical and algebraic expressions and equations.¹⁵</p> <p>7.EE.4¹⁶ Use variables to represent quantities in a real-world or mathematical problem, and construct simple equations and inequalities to solve problems by reasoning about the quantities.</p> <p>a. Solve word problems leading to equations of the form $px + q = r$ and $p(x + q) = r$, where p, q, and r are specific rational numbers. Solve equations of these forms fluently. Compare an algebraic solution to an arithmetic solution, identifying the sequence of the operations used in each approach. <i>For example, the perimeter of a rectangle is 54 cm. Its length is 6 cm. What is its width?</i></p> <p>Draw, construct, and describe geometrical figures and describe the relationships between them.¹⁷</p> <p>7.G.1 Solve problems involving scale drawings of geometric figures, including computing actual lengths and areas from a scale drawing and reproducing a scale drawing at a different scale.</p>

¹⁵ The balance of this cluster is taught in Modules 2, 3, and 4.

¹⁶ In this module, the equations are derived from ratio problems. 7.EE.4a is returned to in Module 2 and Module 3.

¹⁷ 7.G.1 is also covered in Module 4. The balance of this cluster is taught in Module 6.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 7 Modules ¹³
Module 2: Rational Numbers (30 days)	<p>Apply and extend previous understandings of operations with fractions to add, subtract, multiply, and divide rational numbers.</p> <p>7.NS.1 Apply and extend previous understandings of addition and subtraction to add and subtract rational numbers; represent addition and subtraction on a horizontal or vertical number line diagram.</p> <ul style="list-style-type: none"> a. Describe situations in which opposite quantities combine to make 0. <i>For example, a hydrogen atom has 0 charge because its two constituents are oppositely charged.</i> b. Understand $p + q$ as the number located a distance q from p, in the positive or negative direction depending on whether q is positive or negative. Show that a number and its opposite have a sum of 0 (are additive inverses). Interpret sums of rational numbers by describing real-world contexts. c. Understand subtraction of rational numbers as adding the additive inverse, $p - q = p + (-q)$. Show that the distance between two rational numbers on the number line is the absolute value of their difference, and apply this principle in real-world contexts. d. Apply properties of operations as strategies to add and subtract rational numbers. <p>7.NS.2 Apply and extend previous understandings of multiplication and division and of fractions to multiply and divide rational numbers.</p> <ul style="list-style-type: none"> a. Understand that multiplication is extended from fractions to rational numbers by requiring that operations continue to satisfy the properties of operations, particularly the distributive property, leading to products such as $(-1)(-1) = 1$ and the rules for multiplying signed numbers. Interpret products of rational numbers by describing real-world contexts. b. Understand that integers can be divided, provided that the divisor is not zero, and every quotient of integers (with non-zero divisor) is a rational number. If p and q are integers, then $-(p/q) = (-p)/q = p/(-q)$. Interpret quotients of rational numbers by describing real-world contexts. c. Apply properties of operations as strategies to multiply and divide rational numbers.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 7 Modules ¹³
	<p>d. Convert a rational number to a decimal using long division; know that the decimal form of a rational number terminates in 0s or eventually repeats.</p> <p>7.NS.3 Solve real-world and mathematical problems involving the four operations with rational numbers.¹⁸</p> <p>Use properties of operations to generate equivalent expressions.¹⁹</p> <p>7.EE.2²⁰ Understand that rewriting an expression in different forms in a problem context can shed light on the problem and how the quantities in it are related. <i>For example, $a + 0.05a = 1.05a$ means that “increase by 5%” is the same as “multiply by 1.05.”</i></p> <p>Solve real-life and mathematical problems using numerical and algebraic expressions and equations.²¹</p> <p>7.EE.4²² Use variables to represent quantities in a real-world or mathematical problem, and construct simple equations and inequalities to solve problems by reasoning about the quantities.</p> <p>a. Solve word problems leading to equations of the form $px + q = r$ and $p(x + q) = r$, where p, q, and r are specific rational numbers. Solve equations of these forms fluently. Compare an algebraic solution to an arithmetic solution, identifying the sequence of the operations used in each approach. <i>For example, the perimeter of a rectangle is 54 cm. Its length is 6 cm. What is its width?</i></p>
Module 3: Expressions and Equations (35 days)	<p>Use properties of operations to generate equivalent expressions.</p> <p>7.EE.1 Apply properties of operations as strategies to add, subtract, factor, and expand linear expressions with rational coefficients.</p>

¹⁸ Computations with rational numbers extend the rules for manipulating fractions to complex fractions.

¹⁹ The balance of this cluster is taught in Module 3.

²⁰ In this module, this standard is applied to expressions with rational numbers in them.

²¹ The balance of this cluster is taught in Module 3.

²² In this module the equations include negative rational numbers.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 7 Modules ¹³
	<p>7.EE.2 Understand that rewriting an expression in different forms in a problem context can shed light on the problem and how the quantities in it are related. <i>For example, $a + 0.05a = 1.05a$ means that “increase by 5%” is the same as “multiply by 1.05.”</i></p> <p>Solve real-life and mathematical problems using numerical and algebraic expressions and equations.</p> <p>7.EE.3²³ Solve multi-step real-life and mathematical problems posed with positive and negative rational numbers in any form (whole numbers, fractions, and decimals), using tools strategically. Apply properties of operations to calculate with numbers in any form; convert between forms as appropriate; and assess the reasonableness of answers using mental computation and estimation strategies. <i>For example: If a woman making \$25 an hour gets a 10% raise, she will make an additional $\frac{1}{10}$ of her salary an hour, or \$2.50, for a new salary of \$27.50. If you want to place a towel bar $9\frac{3}{4}$ inches long in the center of a door that is $27\frac{1}{2}$ inches wide, you will need to place the bar about 9 inches from each edge; this estimate can be used as a check on the exact computation.</i></p> <p>7.EE.4 Use variables to represent quantities in a real-world or mathematical problem, and construct simple equations and inequalities to solve problems by reasoning about the quantities.</p> <ol style="list-style-type: none"> Solve word problems leading to equations of the form $px + q = r$ and $p(x + q) = r$, where p, q, and r are specific rational numbers. Solve equations of these forms fluently. Compare an algebraic solution to an arithmetic solution, identifying the sequence of the operations used in each approach. <i>For example, the perimeter of a rectangle is 54 cm. Its length is 6 cm. What is its width?</i> Solve word problems leading to inequalities of the form $px + q > r$ or $px + q < r$, where p, q, and r are specific rational numbers. Graph the solution set of the inequality and interpret it in the context of the problem. <i>For example: As a salesperson, you are paid \$50 per week plus \$3 per sale. This week you want your pay to be at least \$100. Write an inequality for</i>

²³ Problems in this module take on any form but percent, which is included in Module 4.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 7 Modules ¹³
	<p><i>the number of sales you need to make, and describe the solutions.</i></p> <p>Solve real-life and mathematical problems involving angle measure, area, surface area, and volume.²⁴</p> <p>7.G.4 Know the formulas for the area and circumference of a circle and use them to solve problems; give an informal derivation of the relationship between the circumference and area of a circle.</p> <p>7.G.5 Use facts about supplementary, complementary, vertical, and adjacent angles in a multi-step problem to write and solve simple equations for an unknown angle in a figure.</p> <p>7.G.6 Solve real-world and mathematical problems involving area, volume and surface area of two- and three-dimensional objects composed of triangles, quadrilaterals, polygons, cubes, and right prisms.</p>
<p>Module 4:</p> <p>Percent and Proportional Relationships²⁵</p> <p>(25 days)</p>	<p>Analyze proportional relationships and use them to solve real-world and mathematical problems.</p> <p>7.RP.1 Compute unit rates associated with ratios of fractions, including ratios of lengths, areas and other quantities measured in like or different units. <i>For example, if a person walks $\frac{1}{2}$ mile in each $\frac{1}{4}$ hour, compute the unit rate as the complex fraction $\frac{1/2}{1/4}$ miles per hour, equivalently 2 miles per hour.</i></p> <p>7.RP.2 Recognize and represent proportional relationships between quantities.</p> <ol style="list-style-type: none"> Decide whether two quantities are in a proportional relationship, e.g., by testing for equivalent ratios in a table or graphing on a coordinate plane and observing whether the graph is a straight line through the origin. Identify the constant of proportionality (unit rate) in tables, graphs, equations, diagrams, and verbal descriptions of proportional relationships. Represent proportional relationships by equations. <i>For example, if total cost t is proportional to the number n of items purchased at a constant price p, the relationship between the total cost and the number of items can be expressed as $t = pn$.</i>

²⁴ Emphasis of 7.G.5 and 7.G.6 in this module is on solving equations. The standards are returned to in Module 6.

²⁵ The emphasis in this module is on percent.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 7 Modules ¹³
	<p>d. Explain what a point (x, y) on the graph of a proportional relationship means in terms of the situation, with special attention to the points $(0, 0)$ and $(1, r)$ where r is the unit rate.</p> <p>7.RP.3 Use proportional relationships to solve multistep ratio and percent problems. <i>Examples: simple interest, tax, markups and markdowns, gratuities and commissions, fees, percent increase and decrease, percent error.</i></p> <p>Solve real-life and mathematical problems using numerical and algebraic expressions and equations.²⁶</p> <p>7.EE.3 Solve multi-step real-life and mathematical problems posed with positive and negative rational numbers in any form (whole numbers, fractions, and decimals), using tools strategically. Apply properties of operations to calculate with numbers in any form; convert between forms as appropriate; and assess the reasonableness of answers using mental computation and estimation strategies. <i>For example: If a woman making \$25 an hour gets a 10% raise, she will make an additional $\frac{1}{10}$ of her salary an hour, or \$2.50, for a new salary of \$27.50. If you want to place a towel bar $9\frac{3}{4}$ inches long in the center of a door that is $27\frac{1}{2}$ inches wide, you will need to place the bar about 9 inches from each edge; this estimate can be used as a check on the exact computation.</i></p> <p>Draw, construct, and describe geometrical figures and describe the relationships between them.²⁷</p> <p>7.G.1 Solve problems involving scale drawings of geometric figures, including computing actual lengths and areas from a scale drawing and reproducing a scale drawing at a different scale.</p>
<p>Module 5: Statistics and Probability (25 days)</p>	<p>Use random sampling to draw inferences about a population.</p> <p>7.SP.1 Understand that statistics can be used to gain information about a population by examining a sample of the population; generalizations about a population from a sample are valid only if the sample is representative of that population. Understand that random sampling tends to produce representative samples and support valid inferences.</p>

²⁶ 7.EE.3 is introduced in Module 3. The balance of this cluster was taught in the first three modules.

²⁷ 7.G.1 is introduced in Module 1. The balance of this cluster is taught in Module 6.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 7 Modules ¹³
	<p>7.SP.2 Use data from a random sample to draw inferences about a population with an unknown characteristic of interest. Generate multiple samples (or simulated samples) of the same size to gauge the variation in estimates or predictions. <i>For example, estimate the mean word length in a book by randomly sampling words from the book; predict the winner of a school election based on randomly sampled survey data. Gauge how far off the estimate or prediction might be.</i></p> <p>Draw informal comparative inferences about two populations.</p> <p>7.SP.3 Informally assess the degree of visual overlap of two numerical data distributions with similar variabilities, measuring the difference between the centers by expressing it as a multiple of a measure of variability. <i>For example, the mean height of players on the basketball team is 10 cm greater than the mean height of players on the soccer team, about twice the variability (mean absolute deviation) on either team; on a dot plot, the separation between the two distributions of heights is noticeable.</i></p> <p>7.SP.4 Use measures of center and measures of variability for numerical data from random samples to draw informal comparative inferences about two populations. <i>For example, decide whether the words in a chapter of a seventh-grade science book are generally longer than the words in a chapter of a fourth-grade science book.</i></p> <p>Investigate chance processes and develop, use, and evaluate probability models.</p> <p>7.SP.5 Understand that the probability of a chance event is a number between 0 and 1 that expresses the likelihood of the event occurring. Larger numbers indicate greater likelihood. A probability near 0 indicates an unlikely event, a probability around 1/2 indicates an event that is neither unlikely nor likely, and a probability near 1 indicates a likely event.</p> <p>7.SP.6 Approximate the probability of a chance event by collecting data on the chance process that produces it and observing its long-run relative frequency, and predict the approximate relative frequency given the probability. <i>For example, when rolling a number cube 600 times, predict that a 3 or 6 would be rolled roughly 200 times, but probably not exactly 200 times.</i></p>

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 7 Modules ¹³
	<p>7.SP.7 Develop a probability model and use it to find probabilities of events. Compare probabilities from a model to observed frequencies; if the agreement is not good, explain possible sources of the discrepancy.</p> <ul style="list-style-type: none"> a. Develop a uniform probability model by assigning equal probability to all outcomes, and use the model to determine probabilities of events. <i>For example, if a student is selected at random from a class, find the probability that Jane will be selected and the probability that a girl will be selected.</i> b. Develop a probability model (which may not be uniform) by observing frequencies in data generated from a chance process. <i>For example, find the approximate probability that a spinning penny will land heads up or that a tossed paper cup will land open-end down. Do the outcomes for the spinning penny appear to be equally likely based on the observed frequencies?</i> <p>7.SP.8 Find probabilities of compound events using organized lists, tables, tree diagrams, and simulation.</p> <ul style="list-style-type: none"> a. Understand that, just as with simple events, the probability of a compound event is the fraction of outcomes in the sample space for which the compound event occurs. b. Represent sample spaces for compound events using methods such as organized lists, tables and tree diagrams. For an event described in everyday language (e.g., “rolling double sixes”), identify the outcomes in the sample space which compose the event. c. Design and use a simulation to generate frequencies for compound events. <i>For example, use random digits as a simulation tool to approximate the answer to the question: If 40% of donors have type A blood, what is the probability that it will take at least 4 donors to find one with type A blood?</i>

Module 6:
Geometry
(35 days)

Draw, construct, and describe geometrical figures and describe the relationships between them.²⁸

- 7.G.2** Draw (freehand, with ruler and protractor, and with technology) geometric shapes with given conditions. Focus on constructing triangles from three measures of angles or sides, noticing when the conditions determine a unique triangle, more than one triangle, or no triangle.
- 7.G.3** Describe the two-dimensional figures that result from slicing three-dimensional figures, as in plane sections of right rectangular prisms and right rectangular pyramids.

Solve real-life and mathematical problems involving angle measure, area, surface area, and volume.²⁹

- 7.G.5** Use facts about supplementary, complementary, vertical, and adjacent angles in a multi-step problem to write and solve simple equations for an unknown angle in a figure.
- 7.G.6** Solve real-world and mathematical problems involving area, volume and surface area of two- and three-dimensional objects composed of triangles, quadrilaterals, polygons, cubes, and right prisms.

²⁸ The balance of this cluster is taught in Modules 1 and 4.

²⁹ 7.G.4 is taught in Module 3; 7.G.5 and 7.G.6 are introduced in Module 3.

Sequence of Grade 8 Modules Aligned with the Standards

Module 1: Integer Exponents and Scientific Notation

Module 2: The Concept of Congruence

Module 3: Similarity

Module 4: Linear Equations

Module 5: Examples of Functions from Geometry

Module 6: Linear Functions

Module 7: Introduction to Irrational Numbers Using Geometry

Summary of Year

Eighth grade mathematics is about (1) formulating and reasoning about expressions and equations, including modeling an association in bivariate data with a linear equation, and solving linear equations and systems of linear equations; (2) grasping the concept of a function and using functions to describe quantitative relationships; (3) analyzing two- and three-dimensional space and figures using distance, angle, similarity, and congruence, and understanding and applying the Pythagorean Theorem.

Key Areas of Focus for Grade 8: Linear algebra

Rationale for Module Sequence in Grade 8

This year begins with students extending the properties of exponents to integer exponents in Module 1. They use the number line model to support their understanding of the rational numbers and the number system. The number system is revisited at the end of the year (in Module 7) to develop the *real* number line through a detailed study of irrational numbers.

CCLS Major Emphasis Clusters

Expressions and Equations

- Work with radicals and integer exponents.
- Understand the connections between proportional relationships, lines, and linear equations.
- Analyze and solve linear equations and pairs of simultaneous linear equations.

Functions

- Define, evaluate, and compare functions.

Geometry

- Understand congruence and similarity using physical models, transparencies, or geometry software.
- Understand and apply the Pythagorean Theorem.

In Module 2, students study congruence by experimenting with rotations, reflections, and translations of geometrical figures. Their study of congruence culminates with an introduction to the Pythagorean Theorem in which the teacher guides students through the “square-within-a-square” proof of the theorem. Students practice the theorem in real-world applications and mathematical problems throughout the year. (In Module 7, students learn to prove the Pythagorean Theorem on their own and are assessed on that knowledge in that module.)

The experimental study of rotations, reflections, and translations in Module 2 prepares students for the more complex work of understanding the effects of dilations on geometrical figures in their study of similarity in Module 3. They use similar triangles to solve unknown angle, side length and area problems. Module 3 concludes with revisiting a proof of the Pythagorean Theorem from the perspective of similar triangles.

In Module 4, students use similar triangles learned in Module 3 to explain why the slope of a line is well-defined. Students learn the connection between proportional relationships, lines, and linear equations as they develop ways to represent a line by different equations ($y = mx + b$, $y - y_1 = m(x - x_1)$, etc.). They analyze and solve linear equations and pairs of simultaneous linear equations. The equation of a line provides a natural transition into the idea of a function explored in the next two modules.

Students are introduced to functions in the context of linear equations and area/volume formulas in Module 5. They define, evaluate, and compare functions using equations of lines as a source of linear functions and area and volume formulas as a source of non-linear functions.

In Module 6, students return to linear functions in the context of statistics and probability as bivariate data provides support in the use of linear functions.

By Module 7 students have been using the Pythagorean Theorem for several months. They are sufficiently prepared to learn and explain a proof of the theorem on their own. The Pythagorean Theorem is also used to motivate a discussion of irrational square roots (irrational cube roots are introduced via volume of a sphere). Thus, as the year began with looking at the number system, so it concludes with students understanding irrational numbers and ways to represent them (radicals, non-repeating decimal expansions) on the real number line.

Alignment Chart

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 8 Modules ³⁰
Module 1: Integer Exponents and Scientific Notation (20 days)	Work with radicals and integer exponents.³¹ <p>8.EE.1 Know and apply the properties of integer exponents to generate equivalent numerical expressions. <i>For example, $3^2 \times 3^{-5} = 3^{-3} = 1/3^3 = 1/27$.</i></p> <p>8.EE.3 Use numbers expressed in the form of a single digit times an integer power of 10 to estimate very large or very small quantities, and to express how many times as much one is than the other. <i>For example, estimate the population of the United States as 3×10^8 and the population of the world as 7×10^9, and determine that the world population is more than 20 times larger.</i></p> <p>8.EE.4 Perform operations with numbers expressed in scientific notation, including problems where both decimal and scientific notation are used. Use scientific notation and choose units of appropriate size for measurements of very large or very small quantities (e.g., use millimeters per year for seafloor spreading). Interpret scientific notation that has been generated by technology.</p>
Module 2: The Concept of Congruence (25 days)	Understand congruence and similarity using physical models, transparencies, or geometry software.³² <p>8.G.1 Verify experimentally the properties of rotations, reflections, and translations:</p> <ol style="list-style-type: none"> Lines are taken to lines, and line segments to line segments of the same length. Angles are taken to angles of the same measure. Parallel lines are taken to parallel lines. <p>8.G.2 Understand that a two-dimensional figure is congruent to another if the second can be obtained from the first by a sequence of rotations, reflections, and translations; given two congruent figures, describe a sequence that exhibits the congruence between them.</p>

³⁰ When a cluster is referred to in this chart without a footnote, the cluster is taught in its entirety.

³¹ 8.EE.2 is covered in Module 7.

³² 8.G.3, 8.G.4, and the balance of 8.G.5 are taught in Module 3.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 8 Modules ³⁰
	<p>8.G.5³³ Use informal arguments to establish facts about the angle sum and exterior angle of triangles, about the angles created when parallel lines are cut by a transversal, and the angle-angle criterion for similarity of triangles. <i>For example, arrange three copies of the same triangle so that the sum of the three angles appears to form a line, and give an argument in terms of transversals why this is so.</i></p> <p>Understand and apply the Pythagorean Theorem.³⁴</p> <p>8.G.6³⁵ Explain a proof of the Pythagorean Theorem and its converse.</p> <p>8.G.7³⁶ Apply the Pythagorean Theorem to determine unknown side lengths in right triangles in real-world and mathematical problems in two and three dimensions.</p>
Module 3: Similarity (25 days)	<p>Understand congruence and similarity using physical models, transparencies, or geometry software.³⁷</p> <p>8.G.3 Describe the effect of dilations, translations, rotations, and reflections on two-dimensional figures using coordinates.</p> <p>8.G.4 Understand that a two-dimensional figure is similar to another if the second can be obtained from the first by a sequence of rotations, reflections, translations, and dilations; given two similar two-dimensional figures, describe a sequence that exhibits the similarity between them.</p> <p>8.G.5 Use informal arguments to establish facts about the angle sum and exterior angle of triangles, about the angles created when parallel lines are cut by a transversal, and the angle-angle criterion for similarity of triangles. <i>For example, arrange three copies of the same triangle so that the sum of the three angles appears to form a line, and give an argument in terms of transversals why this is so.</i></p>

³³ Congruence is addressed in this Module. The balance of this standard (similarity) is taught in Module 3.

³⁴ 8.G.6 and 8.G.7 are also taught in Module 3. The balance of 8.G.6 and 8.G.7 are covered in Module 7, along with standard 8.G.8.

³⁵ Pythagorean is proved in this module guided by teacher (square within a square proof). Students are not responsible for explaining a proof until Module 7.

³⁶ This standard is started in this module and practiced during the year. No solutions that involve irrational numbers are introduced until Module 7.

³⁷ The balance of this cluster is taught in Module 1.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 8 Modules ³⁰
	<p>Understand and apply the Pythagorean Theorem.³⁸</p> <p>8.G.6³⁹ Explain a proof of the Pythagorean Theorem and its converse.</p> <p>8.G.7⁴⁰ Apply the Pythagorean Theorem to determine unknown side lengths in right triangles in real-world and mathematical problems in two and three dimensions.</p>
<p>Module 4:</p> <p>Linear Equations</p> <p>(40 days)</p>	<p>Understand the connections between proportional relationships, lines, and linear equations.</p> <p>8.EE.5 Graph proportional relationships, interpreting the unit rate as the slope of the graph. Compare two different proportional relationships represented in different ways. <i>For example, compare a distance-time graph to a distance-time equation to determine which of two moving objects has greater speed.</i></p> <p>8.EE.6 Use similar triangles to explain why the slope m is the same between any two distinct points on a non-vertical line in the coordinate plane; derive the equation $y = mx$ for a line through the origin and the equation $y = mx + b$ for a line intercepting the vertical axis at b.</p> <p>Analyze and solve linear equations and pairs of simultaneous linear equations.</p> <p>8.EE.7 Solve linear equations in one variable.</p> <ol style="list-style-type: none"> Give examples of linear equations in one variable with one solution, infinitely many solutions, or no solutions. Show which of these possibilities is the case by successively transforming the given equation into simpler forms, until an equivalent equation of the form $x = a$, $a = a$, or $a = b$ results (where a and b are different numbers). Solve linear equations with rational number coefficients, including equations whose solutions require expanding expressions using the distributive property and collecting like terms.

³⁸ 8.G.6 and 8.G.7 are also taught in Module 2. The balance of standards 8.G.6 and 8.G.7 are covered in Module 7, along with standard 8.G.8.

³⁹ Pythagorean is proved in this module guided by teacher (proof using similar triangles). Students are not responsible for explaining a proof until Module 7.

⁴⁰ This standard is started in this module and practiced during the year. No solutions that involve irrational numbers are introduced until Module 7.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 8 Modules ³⁰
	<p>8.EE.8 Analyze and solve pairs of simultaneous linear equations.</p> <ul style="list-style-type: none"> a. Understand that solutions to a system of two linear equations in two variables correspond to points of intersection of their graphs, because points of intersection satisfy both equations simultaneously. b. Solve systems of two linear equations in two variables algebraically, and estimate solutions by graphing the equations. Solve simple cases by inspection. <i>For example, $3x + 2y = 5$ and $3x + 2y = 6$ have no solution because $3x + 2y$ cannot simultaneously be 5 and 6.</i> c. Solve real-world and mathematical problems leading to two linear equations in two variables. <i>For example, given coordinates for two pairs of points, determine whether the line through the first pair of points intersects the line through the second pair.</i>
<p>Module 5: Examples of Functions from Geometry (15 days)</p>	<p>Define, evaluate, and compare functions.⁴¹</p> <p>8.F.1 Understand that a function is a rule that assigns to each input exactly one output. The graph of a function is the set of ordered pairs consisting of an input and the corresponding output.⁴²</p> <p>8.F.2 Compare properties of two functions each represented in a different way (algebraically, graphically, numerically in tables, or by verbal descriptions). <i>For example, given a linear function represented by a table of values and a linear function represented by an algebraic expression, determine which function has the greater rate of change.</i></p> <p>8.F.3 Interpret the equation $y = mx + b$ as defining a linear function, whose graph is a straight line; give examples of functions that are not linear. <i>For example, the function $A = s^2$ giving the area of a square as a function of its side length is not linear because its graph contains the points (1,1), (2,4) and (3,9), which are not on a straight line.</i></p>

⁴¹ Linear and non-linear functions are compared in this module using linear equations and area/volume formulas as examples.

⁴² Function notation is not required in Grade 8.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 8 Modules ³⁰
	<p>Solve real-world and mathematical problems involving volume of cylinders, cones, and spheres.</p> <p>8.G.9⁴³ Know the formulas for the volumes of cones, cylinders, and spheres and use them to solve real-world and mathematical problems.</p>
<p>Module 6:</p> <p>Linear Functions</p> <p>(20 days)</p>	<p>Use functions to model relationships between quantities.</p> <p>8.F.4 Construct a function to model a linear relationship between two quantities. Determine the rate of change and initial value of the function from a description of a relationship or from two (x, y) values, including reading these from a table or from a graph. Interpret the rate of change and initial value of a linear function in terms of the situation it models, and in terms of its graph or a table of values.</p> <p>8.F.5 Describe qualitatively the functional relationship between two quantities by analyzing a graph (e.g., where the function is increasing or decreasing, linear or nonlinear). Sketch a graph that exhibits the qualitative features of a function that has been described verbally.</p> <p>Investigate patterns of association in bivariate data.⁴⁴</p> <p>8.SP.1 Construct and interpret scatter plots for bivariate measurement data to investigate patterns of association between two quantities. Describe patterns such as clustering, outliers, positive or negative association, linear association, and nonlinear association.</p> <p>8.SP.2 Know that straight lines are widely used to model relationships between two quantitative variables. For scatter plots that suggest a linear association, informally fit a straight line, and informally assess the model fit by judging the closeness of the data points to the line.</p> <p>8.SP.3 Use the equation of a linear model to solve problems in the context of bivariate measurement data, interpreting the slope and intercept. <i>For example, in a linear model for a biology experiment, interpret a slope of 1.5 cm/hr as meaning that an additional hour of sunlight each day is associated with an additional 1.5 cm in mature plant height.</i></p>

⁴³ Solutions that introduce irrational numbers are not introduced until Module 7.

⁴⁴ 8.SP standards are used as applications to the work done with 8.F standards.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 8 Modules ³⁰
	<p>8.SP.4 Understand that patterns of association can also be seen in bivariate categorical data by displaying frequencies and relative frequencies in a two-way table. Construct and interpret a two-way table summarizing data on two categorical variables collected from the same subjects. Use relative frequencies calculated for rows or columns to describe possible association between the two variables. <i>For example, collect data from students in your class on whether or not they have a curfew on school nights and whether or not they have assigned chores at home. Is there evidence that those who have a curfew also tend to have chores?</i></p>
<p>Module 7: Introduction to Irrational Numbers Using Geometry (35 days)</p>	<p>Know that there are numbers that are not rational, and approximate them by rational numbers.</p> <p>8.NS.1 Know that numbers that are not rational are called irrational. Understand informally that every number has a decimal expansion; for rational numbers show that the decimal expansion repeats eventually, and convert a decimal expansion which repeats eventually into a rational number.</p> <p>8.NS.2 Use rational approximations of irrational numbers to compare the size of irrational numbers, locate them approximately on a number line diagram, and estimate the value of expressions (e.g., π^2). <i>For example, by truncating the decimal expansion of $\sqrt{2}$, show that $\sqrt{2}$ is between 1 and 2, then between 1.4 and 1.5, and explain how to continue on to get better approximations.</i></p> <p>Work with radicals and integer exponents.⁴⁵</p> <p>8.EE.2 Use square root and cube root symbols to represent solutions to equations of the form $x^2 = p$ and $x^3 = p$, where p is a positive rational number. Evaluate square roots of small perfect squares and cube roots of small perfect cubes. Know that $\sqrt{2}$ is irrational.</p> <p>Understand and apply the Pythagorean Theorem.</p> <p>8.G.6 Explain a proof of the Pythagorean Theorem and its converse.</p> <p>8.G.7 Apply the Pythagorean Theorem to determine unknown side lengths in right triangles in real-world and mathematical problems in two and three dimensions.</p>

⁴⁵ The balance of this cluster is taught in Module 1.

Module and Approximate Number of Instructional Days	Common Core Learning Standards Addressed in Grade 8 Modules ³⁰
	<p>8.G.8 Apply the Pythagorean Theorem to find the distance between two points in a coordinate system.</p> <p>Solve real-world and mathematical problems involving volume of cylinders, cones, and spheres.</p> <p>8.G.9 Know the formulas for the volumes of cones, cylinders, and spheres and use them to solve real-world and mathematical problems.⁴⁶</p>

⁴⁶ Solutions that introduce irrational numbers are allowed in this module.



Catalyst: Bremerton

Section 4: Attachment 4

Contents:

- Curricula Development Plan
- Bremerton School District Subgroup Data
- An Advocate's Guide to Transforming Special Education

Attachment 4: Plan for Curricula Development/Selection

Catalyst founders have a comprehensive plan to guide the selection of curricula for the school. Leveraging their collective 30+ years of experience designing, founding, and leading high-performing schools serving predominantly low-income students and students of color, Catalyst will select curricula that are horizontally and vertically aligned to standards, culturally responsive and relevant, and are aligned to the Catalyst instructional model. Once curricula are selected Catalyst will, at least annually, review curricula to ensure that it is vertically and horizontally aligned. We will also review materials to ensure that they are free of all types of bias and to ensure that all cultures of our school are represented in instructional materials and that materials are culturally responsive. A tool like OSPI's *Washington Models for the Evaluation of Bias Content in Instructional Materials* will be used.

Additionally, Catalyst maintains strong relationships with high performing schools locally and nationally who continuously improve their curricula. Catalyst founder Amanda Gardner sits on the Bainbridge Island School District Curriculum Committee, the group which vets and selects various curricula for the district. Additionally, Catalyst has a deep relationship with Navigator Schools (Bay Area), Impact Public Schools (Seattle), Valor Collegiate Charter Schools (Nashville), Voices College Bound Language Academies (Bay Area) and many others. These partnerships allow Catalyst to glean lessons learned as these organizations select, codify, and adapt curricula over time. Finally, Catalyst has established an advisory group that includes local and national leaders who are experts in their subject area(s). This group also includes experts on ensuring that curricula is appropriately developed to serve the needs of English Learners, students with disabilities, and students from other historically marginalized groups.

In addition to the chart below, demonstrating the process Catalyst will use to determine curricula used, this attachment also contains a data sheet for current student performance trends in the Bremerton School District. Please see this data as evidence for the need for a new school option in the community.

Schedule for Curricula Selection

Timeline	Topic	Description	Person(s) Responsible
Winter 2017	Professional Development	Attend UnBound:Ed Standards Institutes	School Co-Founders
Fall/Winter 2018	Curricula Research	Begin auditing curricula currently being used in Bremerton School District and surrounding districts, and complete fact-finding about what has/hasn't worked and for what students	School Co-Founders
Summer 2018	Curricula Review	Review the curricula used at high performing schools nationally for core content areas at all grade levels	School Co-Founders

Timeline	Topic	Description	Person(s) Responsible
Summer 2018	School Review	Create a list of high performing schools to visit locally and nationally, develop timeline for visiting schools	School Co-Founders
Summer 2018	Curriculum Advisory Team	Develop recruitment strategy for experts to join curriculum advisory team, develop outreach strategy	School Co-Founders
Summer 2018	Curricula Research	Develop initial lists of possible curricula, including pros/cons of each, testing them against our educational program terms and what we know about our anticipated population	School Co-Founders
Summer 2018	Curricula Research	Crosswalk list of possible curricula with externally validated resources such as EdReports.org	School Co-Founders
Summer 2018	Professional Development	Engage national expert Dr. Johanna Even on developing school models to effectively serve English Language Learners	School Co-Founders
Fall/Winter 2018	Professional Development	Engage national expert Ana Becerra on launching and leading equitable schools to inform development of Catalyst DEI framework and curricula selection process	School Co-Founders
Fall/Winter 2018	School Visits	Schedule and attend local and national school visits	School Co-Founders
Fall/Winter 2018	Design Team	Assemble design team of community members and educational experts to inform design of instructional model. Begin meeting consistently, 1-2 times per month	School Co-Founders

Timeline	Topic	Description	Person(s) Responsible
Fall/Winter 2018	Curricula Research	Develop formal sharing agreements with high-performing schools of influence including Impact Public Schools, Navigator Schools, Valor Collegiate, and others	School Co-Founders
Spring/Summer 2019	Curricula Selection	Select finalist curricula choices for each content area/grade level	School Co-Founders
Summer 2019	Curricula Selection	Develop curriculum roundtable meetings to vet and gain feedback on final curricula selections and confirm team consensus that these choices will best serve our anticipated school population and advance the experience delineated by our educational program terms	School Co-Founders
Fall/Winter 2019	Playbook Development	Create detailed playbooks for each element of school culture and instructional model, including a playbook for effective implementation of curricula	School Co-Founders
Fall/Winter 2019	Scope + Sequence Development	Create internal scope and sequence documents that are aligned to relevant standards and curricula	School Co-Founders
Fall/Winter 2019	Unpacking Standards	Create unpacking standards toolkits for teachers across grade levels and content areas	School Co-Founders
Fall/Winter 2019	Assessments	Create/select interim assessments aligned with chosen curricula	School Co-Founders

Tentative List of Curricular Choices. The list below provides curricula that we are considering using. Per the timeline described above, we will proceed through a thorough process to vet each curricular option below, as well as other high quality options that are published before our school launches. As we select curricula we will be looking for the following indicators:

- Are the curricula tightly aligned to relevant instructional standards?
- Do the curricula lend itself to the Catalyst instructional model?
- Are the curricula culturally responsive and does it have deep representation of the cultures of Catalyst families in it? If not, can it be supplemented effectively?

- Are the curricula as free as possible of all types of bias?
- Are the curricula rigorous and proven to be effective for all scholars (based on research)?
- Are the curricula proven to be effective serving special populations of scholars such as scholars with disabilities and English Language Learners?
- Are the curricula vertically aligned and does it lend itself to be horizontally aligned per grade level?

Content Area	Possible Curricula	Rationale
Reading Comprehension	Engage NY (6-8)	<p>Units are standards-aligned and meet expectations in Text Quality, Usability, and Building Knowledge per EdReports, a vetted curriculum analysis non-profit. Curriculum is also vertically aligned across the grade levels.</p> <p>American Reading Company has an Academic Advisory board comprised of experts in bias-free education.</p>
	Wit and Wisdom (K-8)	
	American Reading Company (CORE) (K-8)	
Decoding / Phonics	Reading Mastery (K-5)	Standards-aligned units include direct instruction lessons designed to support students' skills in fluency and independence as readers. In later grades, it can be used for intervention. Navigator Public Schools, a program model we are modeling after due to their exceptional results, uses this curriculum.
	Jolly Phonics (K-6)	Standards-aligned lesson progression including phonics and grammar. In later parts of the progression, lessons include nuanced reading skills such as understanding literary devices. Impact Public Schools uses this program and reports strong outcomes to date.
Writing	Lucy Calkins' Units of Study (K-8)	<p>Workshop model for writing which is deliberately designed to offer a routinized environment for scholars including the following components: min-lesson, independent writing, small group writing and conferences, mid-workshop teaching, and author's share. Units of study include opinion/argument, information, and narrative writing.</p> <p>Impact Public Schools uses this program and reports strong outcomes to date. Curriculum is also vertically aligned across the grade levels.</p>

Content Area	Possible Curricula	Rationale
	Thinking Maps (K-8)	Thinking Maps are consistent visual patterns linked directly to eight thought processes that can be used across content areas. By visualizing thinking, students create concrete images of abstract thoughts, helping students reach higher levels of critical thinking and outlines for clear written communication. Navigator Public Schools, a program model we are modeling after due to their exceptional results, uses this program. This approach fosters vertical alignment across the grades by providing common tools for students and teachers to use.
Vocabulary Development	Text Talk (K-3)	Learning in rich context is essential to vocabulary building. Text Talk teaches robust vocabulary in context as a way to demonstrate that words carry meaning. According to Dr. Elfrieda Hiebert, vocabulary instruction outside of context is not effective in making up the gap for students who arrive at school with varying vocabulary levels.
	Words Their Way	Hands-on word sorting approach to word study to build phonological awareness, letter sounds, concepts of print, vocabulary building, and words in context. Used widely in early elementary education with strong results for both native and non-native speakers.
ELA Intervention	Lexia (K-5)	This is a standards-aligned personalized online instruction for students of all abilities in grades K-5. The program offers explicit personalized learning in reading instruction and targets skill gaps as they emerge. Teachers get data and student-specific resources they need for individual and small group instruction without students taking an assessment. Navigator Public Schools, a program model we are using due to their exceptional results, uses this program.
	NewsELA (K-6)	This web-based program allows all students to access cross-content material at their reading level. This program would be used as a supplement to grade level text, to provide schema for struggling readers.
Mathematics- Core	Eureka Math / Engage NY (K-5)	Units are standards aligned and meet expectations in Focus and Coherence, Rigor and Mathematical Practices, Alignment to Standards and have a high Usability Rating K-5 and a moderate Usability Rating 6-8. Curriculum is also vertically aligned across the grade levels.

Content Area	Possible Curricula	Rationale
	Agile Mind Middle School Mathematics (6-8)	Units are standards aligned and meet expectations in Focus and Coherence, Rigor and Mathematical Practices, and Alignment to Standards, and have a high Usability Rating K-5 per EdReports, a vetted curriculum analysis non-profit. Curriculum is also vertically aligned across the grade levels.
	Cognitively Guided Instruction (CGI) (K-8)	CGI is a student-centered approach to teaching math. It starts with what students know and builds on their natural number sense and intuitive approaches to problem solving. We will likely use this approach in conjuncture with a curriculum as the approach trains teachers to listen to students, ask smart questions, and uncover every student's mathematical understanding through inquiry. Though resources go through grade 6, our aim will be to foster the same thinking in grades 7 and 8. Both Navigator Public Schools and Impact Public Schools use this approach and are seeing positive results. Curriculum is also vertically aligned across the grade levels.
Mathematics Intervention	iReady	This online program allows students authentic practice opportunities at the right level, gives teachers regular data points with which to make instructional decisions, and supports the needs of all learners. We are considering this program for centers during our Deep Learning Block so that students can get reinforcement that is just right for them throughout their math instructional time.
	ALEKS (Assessment and LEarning in Knowledge Spaces)	ALEKS is an on-line assessment and learning system. It uses adaptive questioning to quickly determine exactly what a student does and does not know and instructs students through a course. We are considering this program for centers during our Deep Learning Block so that students can get reinforcement that is just right for them throughout their math instructional time. This program can be used as an intervention for a student who is struggling with grade level content as well as for a student who is ahead of grade level content, thus allowing us to differentiate instructional time for all students.

Content Area	Possible Curricula	Rationale
Science	FOSS (K-8)	Aligned to next Generation Science Standards, FOSS is a curriculum developed by the University of California, Berkeley. The program bridges research and practice by giving tools and strategies to teachers for engaging students in rich experience that lead to deeper understanding of science. It is inquiry and observation based and allows students the opportunity to study, think, and write about science.
Social Studies	Social Studies Alive! (k-5) and History Alive! (6-8)	Standards based lessons are designed to help students interact with content beyond the textbook. The program uses both an online platform and experiential exercises to help students deeply understand historical concepts and context. Elementary content includes Me and My World, My School and Family, My Community, Our Community and Beyond, Regions of our Country, and America's Past. Middle school content includes The Ancient World, Medieval World and Beyond, and the United States Through Modern Times.
Social Emotional Learning and Leadership	Teaching Tolerance Social Justice Standards (K-8)	The Social Justice Standards teach an anti-bias curriculum at each stage of education grades K-8. They provide a common language for students and faculty to grapple with Identity, Diversity, Justice and Action. Students need knowledge and skills to combat prejudice in today's classrooms and in our community. The work is based upon Louise Derman-Sparks' four goals for anti-bias education in early childhood. Ms. Derman-Sparks worked has worked for over 50 years on issues of diversity and social justice with young people.
	Valor Collegiate Compass Camp (modified for k-5 and used for 6-8)	Engaging a diverse group of students requires developing students' social emotional skills. Using this program, students explore themes of social-emotional learning and leadership during morning meetings and in an advisory/mentor setting. We plan to take aspects of this program for use in Sunrise and Sunset Hours at Catalyst Public Schools.

List of School Visits and Potential Partnerships

Catalyst founders have worked with dozens of high performing school organizations across the country. Through this work they have visited dozens of schools, both learning from the work these organizations are leading and providing coaching, feedback, an advisory support to many of these organizations. The collective learning from this work with significantly impact the development of the Catalyst instructional model.

Timeframe	School/Organization	Location	Potential Partnership
2017-2018 School Year	Voices College Bound Language Academies	Bay Area, CA	Supporting English Learners
2017-2018 School Year	Navigator Schools	Bay Area, CA	Curriculum Sharing/Teacher Coaching and PD
2017-2018 School Year	Leadership Public Schools	Bay Area, CA	N/A
2017-2018 School Year	Envision Schools	Bay Area, CA	N/A
2016-2017 School Year	Bricolage Academy	New Orleans, LA	N/A
2016-2017 School Year	NOLA Micro School	New Orleans, LA	N/A
2016-2017 School Year	ACE Charter Schools	Bay Area, CA	Serving High-Needs Students
2016-2017 School Year	Downtown College Prep	Bay Area, CA	Serving 1 st Generation College Students
2016-2017 School Year	Rocketship Public Schools	Bay Area, CA	Personalized Learning and Parent Leadership Development
2016-2017 School Year	The New School	Bay Area, CA	

Timeframe	School/Organization	Location	Potential Partnership
2016-2017 School Year	Oxford Day Academy	Bay Area, CA	Student Leadership Development
Fall 2018	Rocky Mountain Prep	Denver, CO	Rigorous Instruction and School Culture
Fall 2018	The Green School	Denver, CO	School Culture and Expeditionary Learning
Fall 2018	Denver School of Science and Technology - Byers	Denver, CO	School Culture and Rigorous Academics
Fall 2018	Impact Public Schools	Seattle, WA	Personalized Learning
Winter 2018	Valor Collegiate	Nashville, TN	Social-Emotional Learning

List of Curriculum Thought Partners

Name	Organization(s)	Area of Expertise
Matt Hammer, Emily Murphy	Innovate Public Schools	Community Organizing and School Design
Elise Darwish	Ensemble Learning	Curriculum and English Language Learners
Dr. Johanna Even	Blended Biliteracy	English Language Learners
Ellie Rounds	Massachusetts Department of Elementary and Secondary Education	Special Education
Jamie Morrison	Uncommon Schools	Curriculum Development
Dr. Ana Becerra Mark Salinas	National Equity Project	Diversity, Equity, and Inclusion

Name	Organization(s)	Area of Expertise
Crystal Ward	Transcend	School Design
Brian Greenberg	Silicon Schools Fund	Personalized Learning
Jen Wickens	Impact Public Schools	Personalized Learning

[illegible]

[illegible]

Section 4: Attachment 4

Catalyst knows that all scholars can reach high expectations when they are supported effectively. This is especially true for scholars with disabilities. Catalyst co-founders have a track record of supporting scholars with disabilities, and their teachers, to make significant gains. Amanda Gardner, Catalyst co-founder, proudly led two schools where scholars with disabilities made up 20-30% of the student population. Boston Prep, the first school she co-founded, was a leader in the field when it came to inclusive co-teaching. Their co-teaching model was one of the first in the Boston charter sector and received praise from New Leaders via their EPIC program. At UP Academy, Ms. Gardner led the creation of an inclusive educational model that served students with significant, low-incidence disabilities. While at Innovate Public Schools, Ms. Gardner supported the creation of the framework that anchors Innovate's *Advocate's Guide for Transforming Special Education*. This framework is the foundation upon which the Catalyst model of service delivery is built. A brief summary of the entire report, along with its introduction, is included below. The full Advocate's guide has been translated into Spanish and supplementary materials are available to work with families, ensuring that they are deeply aware of the strategies and approaches that are proven best practices in serving scholars with disabilities.

AN ADVOCATE'S GUIDE TO TRANSFORMING SPECIAL EDUCATION

CREATING SCHOOLS WHERE ALL STUDENTS CAN THRIVE



Innovate
Public Schools

WHAT IS THE PURPOSE OF THIS GUIDE?

The goal of this guide is to help parents and advocates understand what educational opportunity truly looks like for students with disabilities*. It highlights what research and the highest-performing schools have found are the best practices to help students with disabilities achieve at high levels. Concrete examples, interviews, and school profiles show what this looks like in action.

Disabilities vary widely and so do individual students' strengths, needs, and challenges. No single guide could break down the full complexity of our current special education system. We believe that the people closest to the problem can usually find the best solution. Our goal is to share what works so that local advocates can map their own path forward to realize systemic change.

WHO IS THIS GUIDE FOR?

This guide is for people who want to transform our current special education system. There are many excellent resources to help parents navigate the current system for their own individual child. This is a different type of guide. This guide is meant to assist those fighting for systemic change for children with disabilities - at a school, district, or broader policy level. The following chapters are designed to help those advocates gain an understanding of the key practices in a successful special education system, and what it takes to move the system. There are bright spots across the nation - schools and communities that show what's possible. This guide points the way there.

**This guide uses "students with disabilities" and "students with special needs" interchangeably. Both align to IDEA's definition of a student in special education services, which is any student who has an individualized education plan (IEP).*

For more information, contact Innovate Public Schools

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INTRODUCTION

For far too long, students with disabilities have been left behind. They often get segregated into classrooms with fewer resources and less challenging work. They receive an easier curriculum that does not give them the skills they need for college or a career. They remain stuck in the same special education services, regardless of how moderate their disability may be, or how much it may change over time. When a family asks for more support, they are often dismissed or ignored.

Of the 6.6 million students with disabilities in U.S. public schools, too many are falling through the cracks.*

BY 8TH GRADE, ONLY **8%** are prepared by their schools to read and do math at grade level.

Rhim, Lauren Morando, Jessica Sutter, and Neil Campbell. "Improving Outcomes for Students with Disabilities: Negotiating Common Ground for District and Charter School Collaboration." *Center for American Progress*. January 31st, 2017.

JUST **66%** graduate high school on time.

"The Condition of Education 2017: Children and Youth With Disabilities." *National Center for Education Statistics*. May 2017.

LESS THAN **50%** of those graduates are fully employed two years after finishing school.

Johnson, David PhD. "The Power of High Expectations for Special Education Students." *University of Minnesota College of Education and Human Development Blog*. Nov. 25, 2015.

Who's to blame?

The special education system is complex. On a practical level, what that means is that transforming it will ultimately require changes at every level - from the federal and state government down to local school districts and the school and classroom. As the saying goes, "Think global, start local." This guide focuses on what districts and schools can do right now to deliver better results for students.

The 1975 federal Individuals with Disabilities Education Act (IDEA) says that students with disabilities have the right to a "free and appropriate public education." This law provides a strong legal backing for what researchers and advocates know is best for students with disabilities. But in practice, the federal government has never fully funded the programs necessary to implement this well. State and local governments have also not done nearly enough to provide the resources and support necessary for these students to succeed. School districts have a key role in setting vision, establishing policies, building a strong team, and deciding where to invest their resources. The lack of funding and real shortages in quality general education and special education teachers only makes their job harder. Teachers then struggle to support students with disabilities when they are not supported themselves. Meanwhile, inaccurate assumptions about students with disabilities often lead to denying them the same opportunities to succeed that are afforded to their peers.

To change this, advocates must first understand the law and the rights that it guarantees. Our website (www.innovateschools.org/specialeducation) contains resources that explain these legal rights. But understanding the law is not enough to truly transform educational systems. Advocates and parents must also understand what successful school-level practices look like in order to transform the system into one that truly serves all students. This guide seeks to fill this gap.

*Johnson, David PhD. "The Power of High Expectations for Special Education Students." *University of Minnesota College of Education and Human Development Blog*. Nov. 25, 2015.

MYTH 1

The majority of students with disabilities have a severe and debilitating disability.

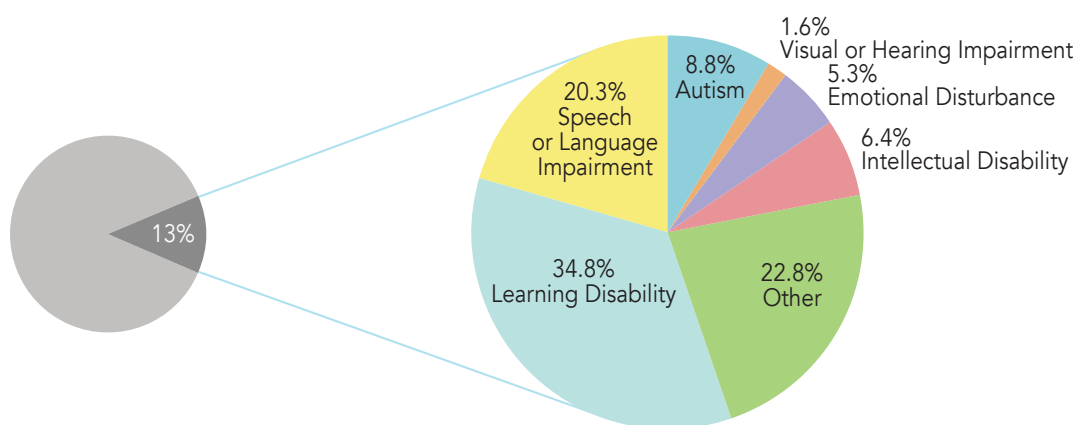
REALITY

The majority of students with disabilities have mild to moderate disabilities. Learning disabilities are the most common.

The Individuals with Disabilities Education Act covers 13 disabilities. These disabilities range from moderate to severe, depending on each child's unique context. For many students, the moderate level of their disability still makes it completely possible for them to master the same content as their peers with the right support and modifications.

13% of students have a disability and their needs are diverse

Breakdown by disability type, United States, 2015



Source: U.S. Department of Education, Office of Special Education Programs, Individuals with Disabilities Education Act (IDEA) database (October 2016)

Common Types of Learning Disabilities

Just over one third of students with disabilities have a specific learning disability. This table shows the most common types.

Dyslexia	Difficulty reading, writing, spelling, and speaking
Dyscalculia	Difficulty with math problems, understanding time, and using money
Dysgraphia	Difficulty with writing, handwriting, spelling, and organizing ideas
Dysphasia (Sensory Integration Disorder)	Difficulty with fine motor skills, hand-eye coordination, balance, and manual dexterity
Dysphasia/Aphasia	Difficulty with language and poor reading comprehension
Auditory Processing Disorder	Difficulty hearing differences between sounds, reading, comprehension, and language
Visual Processing Disorder	Difficulty interpreting visual information reading, math, maps, charts, symbols, and pictures

MYTH 2

Students with disabilities can't master the same content as their peers.

REALITY

More than 80% of students with disabilities can meet the same academic standards as other students with the right support.

Experts affirm that the vast majority of students with disabilities - more than 80% - can meet the same academic standards as other students, when they have the right support.¹ Even students with more severe disabilities should have every opportunity possible to learn challenging academic skills.

We know that far better is possible.

There are schools and districts that are showing what's possible and how to get there. This guide summarizes the research on what they are doing right to create schools where students with disabilities can thrive. It is not meant to help parents advocate only for their own child, but rather to help parents and advocates make large-scale changes in our special education system.

Each chapter focuses on a specific solution for transforming special education and can stand alone as a resource for learning about one issue at a time. We hope this guide will help bridge the divide between experts and non-experts in special education, and help more parents have the knowledge they need to organize and advocate for change.

Of course, the solutions explained here cannot be implemented without a dedicated effort between policymakers, school district leaders, administrators, teachers, families and communities. Working together, these groups can ensure that students with disabilities receive the same opportunities as their peers.

All students deserve every shot at success that our schools can provide them. But for far too long, students with disabilities have been left behind. We believe that "all" truly means all. This report puts the student perspective at the center to highlight the research behind the practices that make a difference.

In order for me to thrive, my school must...



Believe in me



Include me



Find me



Catch me when
(or before) I fall



Meet me where I am
and challenge me



Know me



Involve me and
my family



Stick with me

CHAPTER 1

BELIEVE IN ME



Leaders at every level of the system and the school team believe in the potential of all students, including those with disabilities.

► THE PROBLEM: STUDENTS WITH DISABILITIES MUST OVERCOME AN ENORMOUS "BELIEF GAP"

Belief is a powerful force. Research has shown that what parents and teachers believe about a child's potential deeply affects how far that child will go in life.² Children often live up to the expectations we set for them. Even though the vast majority of students with disabilities have mild disabilities and are capable of leading a successful life in school and beyond, adults often lower their expectations for what they think is possible for them.

In one survey, 85% of students with disabilities expected that they would graduate with a high school diploma.³ But just 59% of parents of students with disabilities expected their child to do so.⁴ Despite having the best interests of their children at heart, parents may not know what is realistic to expect of their child.

Students with disabilities have high expectations for themselves



**85% of students with disabilities
expected that they would graduate with a high school diploma**

Source: U.S. Department of Education, Institute of Education Sciences, National Center for Special Education Research, National Longitudinal Transition Study-2 (NLTS2), Wave 2 youth telephone interview/mail survey, 2003.

Educators also play a significant role in shaping the opportunities that students with disabilities have. Yet, with competing priorities, challenging working conditions, and few resources, they, too, often have expectations for students with disabilities that are far too low.⁵ While more research is necessary to fully understand the impact of teacher expectations on students with disabilities, a 2003 Education Week survey of over 800 general and special education teachers found that “a striking 84 percent of teachers reject[ed] the concept that special education students should be expected to meet the same set of content standards as general education students their age.”⁶ If students with disabilities are going to graduate with a meaningful diploma, they must have access to challenging, grade-level content every step of the way.

The reasons parents and teachers might lower their expectations for students with disabilities vary widely. But when adults don’t believe in students’ abilities, their actions show it. For example, parents might enroll them in less challenging courses or they might not explicitly discuss plans for college or career in specific terms from an early age. In the classroom, teachers might call on these students less often than others or give them less time to answer a question before they give the answer or call on another student. They might seat these students in the back of the classroom so they don’t distract other students. They may water down the curriculum for them or not encourage them to take on challenging material. When adults lower their expectations, they might simply allow these students to give up on themselves.

Students internalize what others believe about them

Students easily pick up on these low expectations. Often, in response, they disengage. They lose motivation and confidence in themselves. This turns what a teacher believes about a student into a dangerous self-fulfilling prophecy.

Self-confidence is one of the biggest predictors of success for students with disabilities. The National Center for Learning Disabilities has found that students with learning and attention issues are four times more likely than their non-disabled peers to struggle with self-confidence.⁷

A lack of confidence may also explain why students with disabilities struggle to stay on track toward a high school diploma. Nationwide, just 65% of students with disabilities graduate -- far lower than the national average for all students at 83%.⁸

Students of color with disabilities face even lower expectations

Just as teachers expect less from students with a disability, research has also shown that teachers expect less from Black and Latino students in general.⁹ Both racism and ableism are rooted in a long history of educational segregation and discrimination. In fact, concerns and lawsuits regarding the segregation of African American students in special education classrooms helped lead the way toward the first federal special education legislation in 1975.¹⁰

To this day, low expectations for students of certain races and for students with disabilities stand in the way of their success. Chapter 3 “Find Me” describes this issue in more detail.

Whether driven by good intentions or by implicit biases, the result of low expectations is the same: students with disabilities are unfairly denied the learning opportunities they deserve.

THE SOLUTION: WE MUST BELIEVE THAT STUDENTS WITH DISABILITIES CAN ACHIEVE AT HIGH LEVELS

Experts affirm that the vast majority of special education students - more than 80% - can meet the same academic standards as other students, as long as schools give them the access, accommodations, instruction, and support they need.¹¹ A common misperception is that students with disabilities are inherently less intelligent than other students. But research has shown that there is no correlation between IQ and disabilities.¹² That means a student can have both a high IQ and a learning disability.

Of course, some students face very severe disabilities that limit their academic success. But too often, we inaccurately lower expectations way too far for even students with moderate disabilities. Once a school labels a student as having “special needs,” often staff automatically assume this student should be held to a lower standard. They then give these students work that is too easy or far below their grade-level and they don’t have the chance to progress. Low expectations set a ceiling for what students with disabilities can do.

“I can’t even remember all the times I have heard the sentiment, ‘If they could meet standards, they wouldn’t have a disability,’” said former education journalist Karin Chenoweth.¹³ To Chenoweth, that statement shows a deep misunderstanding of disabilities and the role special education should play.

Just as a student’s zip code, skin color or family income should not determine what is possible for him, neither should his disability status. Instead of underestimating what students with disabilities can do, school teams must hold all students to a very high bar, and then provide the curriculum and support to help students get there.

“In many cases, students have surprised their teachers and parents - and themselves - by mastering content that, before standards-based reform, was never taught to them,” said Martha Thurlow, Director of the National Center on Educational Outcomes (NCEO).¹⁴

Statewide graduation rates for students with disabilities range from 28 to 83%.¹⁵ California is in the higher end of this range: 66% of the students with disabilities in the 2015-16 cohort graduated from high school within four years.¹⁶ The high graduation rates for students with disabilities in some states prove that disability status doesn’t necessarily determine a student’s destiny. “Not only must we do better, but clearly we can,” said Johns Hopkins education professor Robert Balfanz.¹⁷

When teachers and parents set ambitious but realistic goals for students, it challenges everyone to rethink what is possible. Education research professor Beverly Weiser of Southern Methodist University studied how teacher expectations for students affected their performance. She found that when teachers give students with disabilities challenging work along with helpful feedback, the students score higher on tests. They also show increases in motivation and confidence.¹⁸

Some schools and districts have already proven this is possible. Here are a few examples:

- In California alone, 200 schools prove that students with disabilities can master grade level standards in both English and math at the same rate as students without disabilities in the state.¹⁹
- In California, just 10-15% of students with disabilities achieve at grade level. But at KIPP Raíces Elementary in Los Angeles, which serves primarily low-income students, students with disabilities are scoring more than twice the state average in English (36%) and math (50%).²⁰

- At Lafayette Elementary School, a school in San Francisco Unified that attracts deaf and hard-of-hearing students from across the city, students with disabilities outperform their peers elsewhere in the district and state. By third grade, most of the deaf and hard-of-hearing students at Lafayette are reading and doing math at grade level or beyond.
- Some districts are bucking the trend and graduating high numbers of students. For example, 86% of students with disabilities in Milpitas Unified graduate high school.²¹ Piedmont City Unified School District also graduates the majority of their students with disabilities. In 2015-16, all 39 of their high school seniors with disabilities graduated within four years. Many were also eligible to attend a four-year university in California."²²

When teachers have high expectations, students rise to the challenge

A teacher's low expectations can become a self-fulfilling prophecy for students. The good news is that the self-fulfilling nature of high expectations is just as strong. In 1964, Harvard researchers Robert Rosenthal and Lenore Jacobson did the first study on the impact of teacher expectations on student performance.²³ They told teachers that certain students (chosen randomly) would experience dramatic growth in IQ. In the years that followed, teachers began treating those students differently. Rosenthal observed this in subtle yet significant ways. Teachers gave these students more time for answering questions. They gave them more feedback. They even touched and smiled at these students more. Ultimately, these small actions resulted in these students experiencing greater academic growth than others. This finding is somewhat intuitive. When teachers expect certain students to succeed, those expectations become reality.

Teachers can raise their expectations by changing their own actions

It's clear that we all need to raise our expectations for students with disabilities. But how? One approach is to train teachers and parents to analyze their perceptions of students with disabilities. But attitudes and beliefs are hard to change.

Some recent research suggests that schools instead start with changing teacher behavior, rather than beliefs.²⁴ Robert Pianta at the Curry School of Education at the University of Virginia studied two groups of teachers; he gave the first group standard information about what teachers should believe and expect of their students. He gave the second group an intense behavioral training in which teachers worked with personal coaches to learn ways to change their behavior. These teachers would videotape their classes over a period of a few months, then reflect with their coach about which new behaviors they could try. For example, when a boy speaks out of turn in class, a teacher may instantly believe the boy is disruptive and needs to be managed. This training would instead show the teacher how to acknowledge the boy's energy and encourage him to express it positively.

The result: the beliefs of the second group of teachers changed way more than the first. When teachers learned *how* to change their behavior towards students, their beliefs about *what* students can achieve organically changed over time.

"It's far more powerful to work from the outside in than the inside out, if you want to change expectations," he said.²⁵ In other words, to change someone's mind, talking about it is usually not enough. It is far more effective to show someone what to do.

Instead of trying to convince teachers to change their deep subconscious beliefs about students, this research suggests it is more effective to give them tools to respond differently to certain student behaviors. Pianta suggests how teachers can change their behavior toward students who are struggling. When teachers use these strategies over time, they can actually shift their mindset about what they believe students can accomplish.

7 WAYS TEACHERS CAN CHANGE THEIR EXPECTATIONS FOR ALL STUDENTS - INCLUDING STUDENTS WITH SPECIAL NEEDS

- 1 - Watch how each student interacts:** How do they prefer to engage? What do they seem to like to do? Observe so you can understand all their capabilities.
- 2 - Listen:** Try to understand what motivates them, what their goals are, how they view you and their classmates, and the activities you assign them.
- 3 - Engage:** Talk with students about their individual interests. Don't offer advice or opinions – just listen.
- 4 - Experiment:** Change how you react to challenging behaviors. Rather than responding quickly in the moment, take a breath. Realize that their behavior might just be a way of reaching out to you.
- 5 - Meet:** Each week, spend time with students outside of your role as "teacher." Let the students choose a game or other non-academic activity they'd like to do with you. Your job is NOT to teach but watch, listen and narrate what you see, focusing on students' interests and what they do well. This type of activity is really important for students with whom you often feel in conflict or whom you avoid.
- 6 - Reach out:** Know what your students like to do outside of school. Make it a project for them to tell you about it using some medium in which they feel comfortable: music, video, writing, etc. Find both individual and group time for them to share this with you. Watch and listen to how skilled, motivated and interested they can be. Now think about school through their eyes.
- 7 - Reflect:** Think back on your own best and worst teachers, bosses or supervisors. List five words for each that describe how you felt in your interactions with them. How did the best and the worst make you feel? What specifically did they do or say that made you feel that way? Now think about how your students would describe you. Jot down how they might describe you and why. How do your expectations or beliefs shape how they look at you? Are there parallels in your beliefs and their responses to you?

Robert Pianta, Dean of the Curry School of Education at the University of Virginia

Excerpted from NPR Morning Edition on
"Teachers' Expectations Can Influence How Students Perform"
by Alix Spiegel, September 2012

Mindset matters, and it starts at the top

School and district leaders can play a powerful role in pushing teachers and students to reach higher. They can create district-wide and school-wide goals that put the needs of their most vulnerable students first. This creates a strong sense of shared responsibility for the success of students with disabilities. Here are a few examples:

- In Shenendehowa, New York, the district's strategic plan stated as one of their goals "to share responsibility for student achievement among general education staff, special education staff, and other staff of the district." This district also set clear targets for achievement levels. For example, "By year 2014, 85% of students receiving special education services will reach at least a level 3 [proficiency] on State assessments."²⁶
- In Florida, an Orange County Public Schools goal stated that "80% percent of students receiving special education services will graduate with a standard diploma."²⁷
- At James Campbell High School in Honolulu, Hawaii, the school's goals stated clearly, "The performance gap between general education students and students receiving special education services will be reduced to no more than 10% by 2014."²⁸

Setting ambitious goals does not guarantee improvement. But it is a good place to start. When districts and schools explicitly state their high expectations for students with special needs, they send the message that all students can learn and achieve, despite their differences.



WHAT ADVOCATES CAN DO TOGETHER

HOW TO ORGANIZE
FOR SYSTEMIC CHANGE



BELIEVE IN ME

Leaders at every level of the system and the school team believe in the potential of all students, including those with disabilities.

WHAT TO ASK

- Does everyone in the school system believe students with disabilities can learn at a high level?
- Do they show it in their interactions with students, families and each other?
- Do they make these goals and intentions clear in the plans to which they hold themselves accountable?

WHAT TO LOOK FOR

DISTRICT / CHARTER SCHOOL NETWORK

- District or charter school network leaders express their belief that all students can achieve at high levels and act on that by making sure everyone shares responsibility for the success of students with disabilities.
- The school board and district leaders have publicly stated that the success of students with disabilities is a priority. They publicly present data at least twice a year on how students are doing, and assess whether it's effective.
- District-level or network-level strategic plans include specific measurable goals about improving the performance of students with disabilities and these are updated on an annual basis.
- The district / charter school network surveys students to understand their experience and sets targets for improving on issues that surface in the survey results that relate to students with disabilities.

SCHOOL / CLASSROOM

- All teachers take responsibility for all students. Teacher teams regularly review and discuss data and progress of students with disabilities during common planning time.
- Students with disabilities are enrolled in all levels and types of courses including advanced classes, AP/IB classes, and college-track courses, as well as participate in enrichment and extracurricular activities. Schools track how many students with disabilities are in these classes and activities, and set goals accordingly.
- Students with disabilities are among the students highlighted and celebrated for their strengths in school assemblies, awards ceremonies, newsletters, programs, etc.
- All school staff use language that demonstrates their deep and unwavering belief in the potential of all students to achieve significant academic gains and find success in college and life. This belief is expressed clearly throughout classes and during school events.

HOW CAN PARENTS KNOW WHETHER THEIR SCHOOL IS A PLACE WHERE THEIR CHILD WITH A DISABILITY WILL THRIVE?

At the end of each chapter in this guide, advocates will find this two-page summary that describes the concrete actions that districts, charter management organizations, and schools must take to ensure that students with disabilities succeed. Each section aligns directly with each chapter of this report. Parents can use this tool to advocate not only for their own child, but also to push for reforms that are necessary at a broader level. These observable actions help parent advocates know very clearly what to “look for” in a school, organization, or district that is truly doing what it takes to help students with disabilities succeed. It helps parent advocates pinpoint exactly how their school system is falling short, and more importantly, how to demand more.

WE KNOW WE'VE SUCCEEDED WHEN:

- The superintendent/CEO, principal, special education and general education teachers, staff, and student families believe all students can graduate prepared for college and/or career.
- The superintendent/CEO and principal set an educational vision that addresses how to use school money, staff, space, and time to support students with disabilities, and makes this a priority for everyone -- not just special education specialists.
- Leaders hold all staff accountable for having high expectations for students with disabilities and proactively include these students in the classroom. The school team - including teachers, administrators, and instructional support staff - takes responsibility for the success of every student. They make sure all students receive appropriate support to engage in challenging work, and they regularly discuss each student's progress.

CHAPTER 2

INCLUDE ME



The school team includes students with special needs in general education classrooms during as much of the school day as possible.

► THE PROBLEM: HISTORICALLY, SEGREGATING STUDENTS WITH DISABILITIES HAS LED TO POOR OUTCOMES

For many years, “special education” has been not only a label, but a place. Many educators and parents believed that students with disabilities couldn’t handle the typical general education classroom. They believed that self-contained learning environments offer better instruction, a better sense of community, and a more thoughtful approach to unique needs.

A fundamental part of the Individuals with Disabilities Education Act (IDEA) is the requirement that students with disabilities be placed in the “least restrictive environment” in schools.²⁹ Schools are expected to begin by placing students with disabilities in a general education classroom. Students are only removed from these classrooms when school staff decide that “the nature or severity of the disability of a child”³⁰ makes it impossible to teach this student in a general education setting.

However, this isn’t always what happens. In 2014, only 62% of students with disabilities nationwide were educated in general education classrooms for more than 80% of the day.³¹ In California, it was 53%.³²

► THE SOLUTION: THE MOST EFFECTIVE SCHOOL PRACTICE IS “INCLUSION”

In 2004, a study conducted by the University of Massachusetts Donahue Institute looked at school districts that have achieved better-than-expected results for students with disabilities. They found one thing these schools had in common: they all practiced inclusion.³³

“Inclusion” means that students with disabilities spend as much of the school day as possible in general education, learning the same content and skills as other students. This allows these students to have equal access to grade-level curriculum, general education teachers, and meaningful learning experiences. By not segregating these students in separate classrooms, it can also help these students feel less stigmatized.

Inclusion is also an attitude. “[Our philosophy] is making sure that you are always thinking that the child is a general education student first,” said a teacher from Oxford Preparatory Academy, a school that practices full inclusion, in a 2016 report by the California Charter Schools Association. “Here’s your general education student who has some special needs; not here is a special education student.”³⁴

In the Donahue Institute study, when interviewing all of the case study districts and schools, “among the most common phrases heard during discussions of curriculum access was ‘they are all our kids.’”³⁵

“[Our philosophy] is making sure that you are always thinking that the child is a general education student first...Here’s your general education student who has some special needs; not here is a special education student.”

Teacher, Oxford Preparatory Academy
2016 report by the California Charter Schools Association

In 2001, the American Institutes for Research identified four academically strong California districts for students in special education based on standardized test results. All four of these districts practiced inclusion. They emphasized “creating a learning community unified in the belief that all children can learn.”³⁶

Research shows that when students with disabilities are included in general education classrooms for the majority of the school day, they are more likely to meet grade-level standards than students with similar disabilities who are assigned to separate classrooms. In 2001, the Okaloosa County School District in Florida pushed to include more students in general education programs. By 2014, the number of students with disabilities who passed Florida’s state achievement tests increased from 41% to 69% in reading. It increased from 47% to 78% in math.³⁷

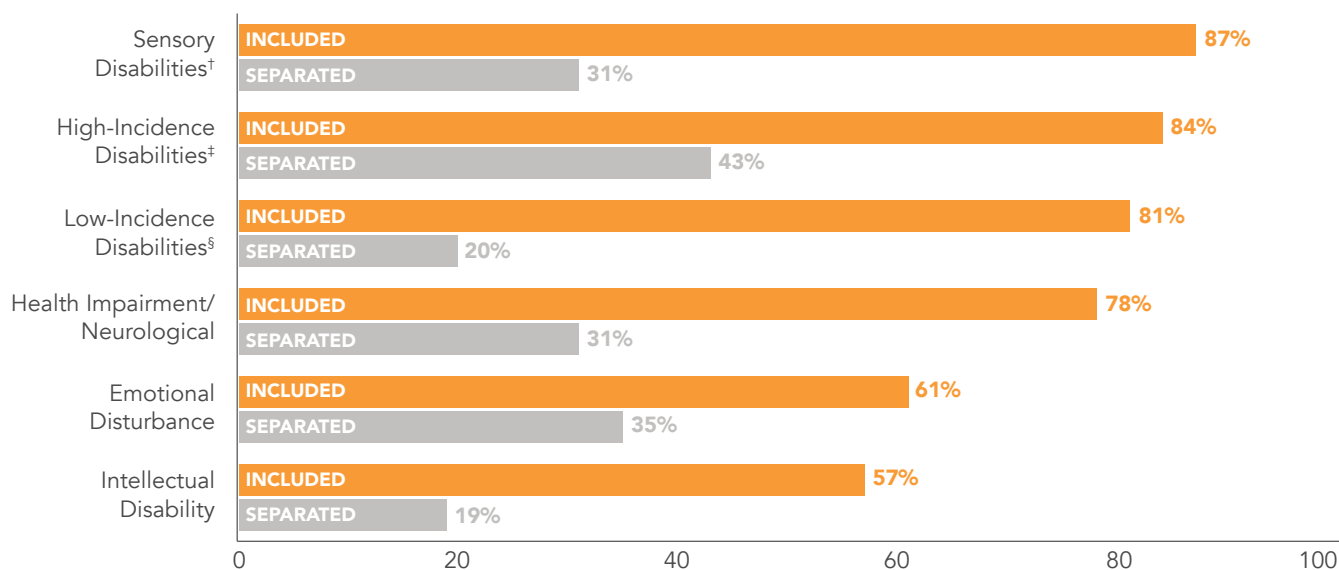
There are long-term benefits to inclusion as well. One Massachusetts study found that when students with high-incidence disabilities are included, the probability that they will graduate on time nearly doubles. Across all disability categories, this finding was consistent: when controlling for all other factors, students with disabilities who were included, were far more likely to graduate than students who were not.³⁸ Another study looked at high school students with disabilities who earned 80% or more of their academic credits in general education classrooms. The study found these students were twice as likely to enroll and stay in postsecondary education than those who received fewer credits in general education classrooms.³⁹

“While neither simple nor cheap, inclusive practices are convincingly the best way to ensure that students with disabilities get access to the same challenging curriculum as their peers,” said the National Center for Learning Disabilities (NCLD).⁴⁰



Students with disabilities who are included are more likely to graduate within four years

Percent likelihood of four-year graduation in the state of Massachusetts by inclusion status*, from 2005 to 2012



SOURCE: Massachusetts Department of Elementary and Secondary Education, 2005 - 2012. State of Massachusetts. Laura Schifter. Using Survival Analysis to Understand Graduation of Students with Disabilities, *Exceptional Children* 2016, Vol. 82(4) 479-496

*Participation in the general education setting for more than 80% of the school day.

†Sensory disabilities in this study include hearing impairment, vision impairment, or physical impairment.

‡High-incidence disabilities in this study include learning disability and speech impairment.

§Low-incidence disabilities in this study include autism, multiple disabilities, or deaf-blind.

Students with disabilities may still benefit from a different classroom setting at times. Sometimes, they need individualized support that works better outside a general education classroom. Sometimes they need a modified curriculum. But at inclusion schools, the school teams aim to make this the exception, rather than the norm. As much as possible, they ensure that students with disabilities - particularly moderate disabilities - can access the same curriculum in the same classrooms as their peers.

More inclusion leads to better outcomes for all students

Some parents fear that inclusive classrooms hurt the academic achievement of students without disabilities. They fear that students with special needs distract teacher attention away from other students. There is limited research on this topic. But so far, studies show that students without disabilities in inclusive classrooms perform around the same as students in classrooms with fewer or no students with disabilities.⁴¹ They have also found that the presence of students with severe disabilities does not decrease teachers' instructional time or the attention paid to other students.

Some research has found that inclusion practices actually benefit all students, not just those with disabilities. Many studies show that inclusion can help students without disabilities develop empathy for students with disabilities. It can also teach them to appreciate and interact across other types of difference.⁴²

Sometimes, inclusion practices also provide other students with more individualized attention in the classroom.

Schools and districts are often legally required to provide students with disabilities with teaching aides or paraprofessionals. When schools practice inclusion well, all students benefit from having these extra adults in the classroom.

For example, after Lafayette Elementary School implemented inclusive practices, some classes

were co-taught by a general education teacher and a special education teacher. Parents of students without disabilities began noticing how the extra support of special education instruction benefited their children too. “We have a lot of parents asking us, ‘Can my kid without a disability be in a co-taught class too?’” said Principal Heath Caceres. “It kind of becomes contagious.”⁴³

To make inclusion work, school teams *must* let student needs drive all decisions

Inclusion does not mean placing students with disabilities in general education classrooms and then hoping for the best. The most effective schools don’t just embrace inclusion. They also put the right support in place to make it work. Here are a few common strategies:

1 - Effective Push-in Supports

Historically, schools taught students with disabilities in separate classrooms. Sometimes these students were “pulled out” of class into small groups in a nearby room or area. More recently, the focus on inclusion has shifted more schools toward a “push-in” model. In this model, specialists come into general education classrooms for some part of the class period to assist students with disabilities. For example, the special education teacher could facilitate a small reading group in an English class. Or, the special education teacher could help a student with a math lesson by providing feedback as the student practices the problems. At the Waldorf-inspired Alice Birney Elementary School in Sacramento, five special education specialists provide a combination of individual push-in supports and small pull-out groups to help with reading, writing, and math support throughout the day.⁴⁴ At the Oakland Charter School for the Arts, students with significant mental health needs begin their day with a breakfast combined with group therapy.⁴⁵ Then in their general education classes, staff counselors and therapists provide support as needed.

2 - Co-teaching

In this strategy, general and special education teachers teach within the same classroom. Both teachers co-plan and deliver the same curriculum to students in large and small groups. The general educator specializes in the overall curriculum, instruction, and assessment. The special education teachers bring in their knowledge of how to adapt instruction and manage behavior.

For example, in the Wyckoff school district in New Jersey, special education elementary teacher Lynda Auxter used to move between classrooms. But she now spends the entire day in one fifth grade classroom with a general educator. “Sometimes [the general educator] does that whole-group lesson. Sometimes, I do whole-group lessons,” Auxter told *Education Week*. “Sometimes, she pulls special and general small groups; sometimes, I pull special and general small groups.”⁴⁶

Co-teaching works best when students can’t necessarily tell the difference between a general education teacher and a special education teacher. Instead, all students benefit from more individualized instruction, whether they have a disability or not. Both teachers can provide different strategies for presenting content as well as ensuring students receive targeted support.

3 - Flexible Grouping

Teachers have the power to decide where a student learns: in pairs, in small groups, or with the whole class. They also group kids for different activities - like pulling together a group of students who are struggling with fractions to work with an adult or having the most advanced readers pair together.

Too often, the default is to group students with disabilities together. These groupings should be flexible and change from day to day and week to week based on students’ work. That way, no student remains segregated in a certain group for the entire year.

Teachers group students in a flexible way that depends on the individual needs of each student, and the daily objective of each lesson. Instead of saying, “This is where this student belongs for the rest of the year,” they ask, “Given the context of my class today, what makes the most sense for grouping my students?”

A 2004 study conducted by the University of Massachusetts Donahue Institute looked at school districts that have achieved better-than-expected results for students with disabilities. The study found that classroom strategies -- like flexible groupings -- helped create an inclusive environment for students with special needs.⁴⁷

The high-performing Two Rivers Public Charter School in Washington, D.C. has great examples of all three of these strategies. A special educator is assigned to each grade level for push-in support. In the middle school grades, a special educator co-teaches with a general educator. Students cycle through learning “stations” based on their needs -- regardless of whether they have a disability. Teachers collect data on how well students perform on each assignment, and then group and regroup students as necessary.⁴⁸

Embrace neurodiversity: View learning differences as strengths

To change the way educators think of students with disabilities, we might need to change the way we think about learning and disability more generally. Most people think of disabilities as a barrier that prevents students from functioning *normally*. But some researchers and disability advocates have developed a powerful new idea called “neurodiversity” to expand what we think of as “normal.”

The phrase “neurodiversity” was coined in the early 1990s by journalist Harvey Blume and Australian autism activist Judy Singer. Through the perspective of neurodiversity, “neurological differences are to be honored and respected just like any other human variation, including diversity in race, ethnicity, gender identity, religion, sexual orientation, and so on,” wrote educator Thomas Armstrong.⁴⁹

Recent brain research has supported this theory.⁵⁰ The research has found that learning differences can actually help a child to succeed.⁵¹ For example, the same characteristics of students with Attention Deficit Hyperactivity Disorder (ADHD) that make it difficult for them to focus might actually also help them multitask better than their peers. Students with autism spectrum disorders might struggle socializing with their peers. But they may outperform them in a task that requires them to find small errors in computer code.

“As an adult with autism, I find the idea of natural variation to be more appealing than the alternative – the suggestion that I am innately bad, or broken and in need of repair,” said John Elder Robison, College of William and Mary Scholar-in-Residence.⁵²

This challenges common attitudes about disabilities. In the past, society has seen differences as deficits and treated them as problems to be solved. Based on this latest research, Armstrong says that special educators need to shift their focus. Instead of fixing and correcting students, educators should instead create environments where neurodiverse students can all succeed.

This means that schools encourage students to learn from these differences. It also means schools develop ways to accommodate all sorts of brains. When teachers emphasize students’ abilities rather than their disabilities, they help ensure that these students not only stay in school, but thrive there.



WHAT ADVOCATES CAN DO TOGETHER

HOW TO ORGANIZE
FOR SYSTEMIC CHANGE



INCLUDE ME

The school team includes students with special needs in general education classrooms during as much of the school day as possible.

WHAT TO ASK

- Are students with disabilities included as much as possible in general education classrooms (per their IEPs)? Right now, what percentage of students with disabilities are fully included, partially included or in separate settings?
- Are students with disabilities included not just in general instruction classrooms, but in all aspects of school culture, e.g. school events and field trips, enrichment, sports and extracurricular activities? Do leaders allocate resources and provide staffing and training to effectively support inclusion?

WHAT TO LOOK FOR

DISTRICT / CHARTER SCHOOL NETWORK

- District / charter school network leaders share a district-wide vision for inclusion of special education students as an explicit core value. This is clearly expressed in mission, vision and strategic planning.
- District / charter school network leaders give schools flexibility to make decisions about how to best use staff and resources, and to create the schedule in a way that includes students with disabilities in general education classrooms, at every grade level.
- Special education staff are included in annual district-level or charter school network-level conversations in which principals make decisions about their budget and staffing.
- District / charter school network keeps track of the number of students who are fully included, partially included, or in separate settings and the extent to which these approaches are working for students.
- District / charter school network leaders expect and support general education teachers to build their expertise in special education, and special education teachers to develop greater content expertise. This could include professional development for the entire staff that is focused on special education topics, knowledge, and skills. It could also be integrating special education topics into general trainings (e.g. a session on literacy that includes a focus on learning disabilities and specific strategies to support struggling readers with dyslexia or traumatic brain injury).

SCHOOL / CLASSROOM

- School leaders make staffing decisions that allow students who need additional intervention or small group instruction to get the time and support they need. For example, a school leader may hire more paraprofessionals, resource specialists, teacher assistants, and co-teachers according to the needs of the student population.
- The school has regular common planning time for general and special education teachers to plan instruction together. Both special education teachers and general education teachers collaborate, co-plan, co-teach, and work with small and large groups of students based on student need. Both deliver content and provide specific supports to struggling students.
- Students with disabilities are seated throughout the classroom alongside their peers without disabilities, at all grade levels. Teachers regularly call on all students, including those with disabilities and ensure all students are engaged in the lesson.
- Student groupings are flexible and change over time based on students' needs and academic progress. Students are not working in the same groups every day based exclusively on their disability status.
- For students who can't be fully included in the general classroom, the school team provides opportunities throughout the school day for students to build relationships and participate in important aspects of the school's culture (e.g. extracurriculars, homework clubs, assemblies, shared lunch times and recess, etc.).

A photograph of a woman with dark hair, smiling warmly while holding a young child. The child is looking towards the camera with a slight smile. The background is softly blurred, showing what appears to be an indoor setting with large windows.

WE KNOW WE'VE SUCCEEDED WHEN:

- Teachers provide individualized support that addresses the specific disabilities of students.
- Teachers give students with disabilities access to the same standards, curriculum and learning environments as other students.
- The school team intentionally designs its staffing plan, budget, physical layout, and schedules to meet the needs of students with disabilities. This requires strong collaboration between general education and special education teachers. This could include co-teaching in the same classroom, one-on-one support (e.g. push-in or pull-out strategies), and flexible groupings that change over the course of the day, week or year.
- The school team creates a school culture that is safe, welcoming and inclusive of students with disabilities. The school culture celebrates and explores learning differences among students. Staff educate all students about the rights of people with disabilities. They also teach students about the contributions people with disabilities have made to society, science, art, technology, literature, etc.

CHAPTER 3

FIND ME



The school team has a quick, accurate and transparent process for identifying students who will benefit from an individualized education plan (IEP).

► THE PROBLEM: THE “WAIT-TO-FAIL” APPROACH LEAVES STUDENTS FURTHER AND FURTHER BEHIND

To support students with disabilities, first schools have to accurately identify who they are. Doctors can usually identify the most severe disabilities in a student at an early age. Often, they can diagnose students well before they enter public school. These disabilities, like blindness or deafness, tend to be easy to spot. They have obvious symptoms and a biological basis that doctors can test.

But for milder disabilities, schools staff usually end up making the diagnosis. The Individuals with Disabilities Education Act (IDEA), states that school districts are not only responsible for assessing children from families who request special education services. They are also responsible for having a process to seek out and find these students to begin with - a duty commonly referred to as “Child Find.” This means that the district should always be looking out for students who “may” need to be assessed, regardless of whether they ultimately qualify for special education or not.

This isn’t easy. Not every student who is struggling has a disability, and not every student who has a disability may look like they are struggling. As a result, schools often wait for students to fail before evaluating them for special education services. Some schools wait to test students for a learning disability until after they have had months or even years of failing grades. Other schools wait until a student’s annual standardized test shows they are behind grade level. Sometimes, schools deliberately wait for students to develop a large discrepancy between their academic performance and their IQ. This “IQ discrepancy model” means that students have to wait far too long to get the support they need. By the time they are identified, it is often too late to catch up.

Under IDEA, a parent has the legal right to request a special education evaluation at any point in their child’s school career. But many parents don’t know this.

Alexa Posny, the former state director of special education in Kansas observed this in her state: “We were missing a lot of kids, and we were catching them way too late, because we were waiting for them to fail before we identified them.”⁵³ Teachers and administrators then interpreted any student’s struggle as a sign of a disability. Posny believes that this led them to over-identify children with disabilities by as much as 50%.

Once schools finally test students for disabilities, the National Academies' National Research Council found that the diagnosis tends to be inaccurate. The process can also be extremely slow.⁵⁴

"While we know clearly the costs of waiting too long, few school districts have in place a mechanism to identify and help children before failure takes hold," said Joseph Torgesen, a research professor at Florida State University.⁵⁵ Torgesen notes that in most cases, schools have no system-wide identification process until third grade. By that time, addressing student disabilities becomes harder and more expensive, and those students struggle to catch up.

Human judgment and bias in special education also limits who gets help

The reality now is the process to decide whether a student should receive special education services relies a lot on human judgment. This is the case from the start. Usually, the identification process begins with a subjective recommendation from a teacher that a student be evaluated. While a teacher and even a parent's recommendation can be a powerful tool to identify when students need specialized support, it is also fraught with human error, lack of expertise in disabilities, and oftentimes bias.

Far too often, racial bias also affects this process. Whether consciously or not, teachers and administrators often assume that students of color can't learn at high levels. A White student and a Black student struggling in the same ways are often treated very differently. This can also happen for English learners. These students face the same struggle as anyone learning a new language. But teachers can misinterpret their struggle as a disability and then recommend these students be evaluated. The same can happen with students who are experiencing trauma. School staff can easily misinterpret their short-term behavioral challenges as a long-term problem caused by a disability. Diagnosis of a disability requires expertise in the identification process and in the specific disability being evaluated for - expertise and training that even the best school staff often don't have.

After a student is recommended for special education evaluation, the student then meets with a school or district psychologist who runs thorough, standardized tests to determine whether the student has a disability. Though these tests provide objective data, the interpretation of the results by district and school staff can also often be subjective. For example, though a student may score numerically low in a math processing assessment, the school or district can ultimately decide that this does not affect the student's ability to succeed in math class, and is not enough to merit special education services.

This subjectivity can lead to both over- and under-identification of students. For certain racial subgroups, students are over-identified for certain disability types -- a phenomenon called "disproportionality." For example, 2.63% of all Black students, nationally, are identified with a "mental retardation" disability. Though this may not be a large number at first glance, it's almost two and half times the rate for White students.⁵⁶ While 17% of school-age children are Black, they represent 33% of students identified as mentally retarded.⁵⁷

At the same time, recent research suggests that paradoxically, under-identification is also a problem. One study compared Black and Latino students with White students at similar levels of achievement and with similar risk factors (such as low family education, low-income and low birth weight). In this analysis, the disproportionality actually reversed. They found that Black and Latino students were less likely to be identified for special education services across five disability categories. Black students were 58% less likely to be diagnosed for learning disabilities and Latino students were 29% less likely.⁵⁸ In these cases, schools deprive students of color of the services they need.

The researchers behind the study argue that this may occur because educators are often more responsive to White parents. They also argue that “low expectations regarding Black children’s abilities may also lead some professionals to ignore the neurological basis of low academic achievement and ‘problem’ behavior.”⁵⁹

In other instances, the over-identification of students of color doesn’t come from a teacher’s bias. It reflects the environmental factors that have disproportionately affected students of color. For example, 36% of urban Black children have elevated levels of lead in their blood, compared to only 4% of suburban White children. Black children are also about twice as likely to be born prematurely. They are three times more likely to suffer from fetal alcohol syndrome.⁶⁰ These factors can influence whether a student develops a learning disability.

Racial bias can affect disability diagnoses in contradictory ways. Certain students in certain areas can be overrepresented, while other students are underrepresented. At a district level, both trends can happen at the same time and hurt students. They mean services don’t get to the students who most need them.

That’s why it is crucial that school leaders and staff are aware of racial bias in its many forms. They must investigate their own process and combat whatever racial trends they may have. That way they can ensure they deliver the right services to the right students.

When schools don’t have a strong process in place for identifying students for special education services, students can struggle or even fail for far too long. They can also receive a mismatch of services that do not address the true challenges the student faces.

THE SOLUTION: SCREEN ALL STUDENTS AND INTERVENE QUICKLY

Some schools and districts have looked to the field of public health to learn how to best identify learning disabilities. Doctors screen all patients using common measures. For example, they measure every patient’s blood pressure to determine their cardiovascular health. As patients develop illnesses, doctors use more and more tests and interventions to gather information and provide care.⁶¹

Similarly, researchers say that schools should universally screen all students for learning disabilities starting in kindergarten. Rather than waiting for subjective recommendations from parents or teachers, universal screening allows teachers to pick up on potential challenges before students struggle.

For example, students with dyslexia often start to fall behind their peers in reading as early as the first grade. Studies have shown that once these early achievement gaps develop they often persist over the long-term, even if students receive intensive support later on. But when students get the support they need as early as kindergarten or pre-school, they are far more likely to catch up. When teachers introduce effective programs early they can target the basic reading foundational skills even before children learn to read. The lesson is clear: The earlier schools can diagnose student disabilities and provide students with the right support, the more likely they will be able to catch up.⁶²

A universal screening process might include a whole range of assessments. For example, it could include an IQ test, an academic achievement test, teacher or parent behavioral ratings, or structured interviews. These assessments don’t give a diagnosis.

They just provide more information. Administrators, teachers and a school or district psychologist must then interpret the data to decide whether it points toward one or more disabilities.

A special California task force of longtime educators and expert researchers focused on statewide special education policies found that universal screening and following up with appropriate intervention is the best course of action for most schools. The task force also argued these actions can prevent many academic and behavioral difficulties from developing in the first place.⁶³

The California Charter Schools Association had similar findings when they looked at charter schools with the strongest results for students with disabilities. They found that these schools' specialists provided support services to all students as needed, regardless of whether the student had been identified as having a disability. For example, one school had a speech and language pathology assistant provide intervention to all students who struggled with speech in younger grades.

Speech services started as soon as students showed any signs of struggle with speech. Some researchers believe that these early identification and prevention programs could reduce the number of students with reading problems by up to 70%.⁶⁴

Once school teams identify students with disabilities and determine interventions, they then have to measure whether the interventions have actually worked. If not, they can either create an alternative plan or increase the intensity of the interventions. Chapter 4 describes this in more detail.



WHAT ADVOCATES CAN DO TOGETHER

HOW TO ORGANIZE
FOR SYSTEMIC CHANGE



FIND ME

The school team has a quick, accurate and transparent process for identifying students who will benefit from an individualized education plan (IEP).

WHAT TO ASK

- How quickly does the school assess students? Do parents or teachers currently have to fight to get their child assessed?
- How accurately do schools identify students with disabilities?
- Does the school and district/CMO take steps to ensure the process is accurate, objective and bias-free?

WHAT TO LOOK FOR

DISTRICT / CHARTER SCHOOL NETWORK

- District / charter school network leaders have a clear process for identifying students with special needs that meets the legal requirements of “Child Find” under IDEA legislation. The process is followed throughout the year, including summer months. Leaders notify parents about policies related to special education and communicate the legal rights of parents and students.
- District / charter school network officials collect and analyze data about specific disability types and report any disproportionality in terms of race, EL status, or income.
- Schools identify students with most disabilities in early elementary grades and the district/CMO provides resources and training for implementing universal screening and early identification processes.
- The district / charter school network supports early identification through ongoing staff, community, and family education and communication. This communication is particularly present in preschool, pre-k, and kindergarten programs with targeted outreach to families that may not know their legal rights or the benefits of early identification.

SCHOOL / CLASSROOM

- School team proactively sends home information to all parents, especially those with students in early grades, to explain the process for assessing and identifying students with disabilities, the timelines, and the legal rights of parents and students throughout the process.
- If a parent requests that a student be assessed for special education services, the school team acts quickly to perform complete psycho-educational assessments as required by law.
- School teams collect data from a wide variety of sources including academic assessments, behavioral checklists, and early childhood development inventories for all students, including those in early grades. Teams use this data to conduct universal screenings and identify students who need additional support and those who might benefit from special education services.
- School-wide systems are in place for sharing data about student performance and behavior, which is used to make decisions about which students are referred to be assessed and when for special education.



WE KNOW WE'VE SUCCEEDED WHEN:

- The school team provides early, school-wide and appropriately intensive support to all students as soon as they fall behind.
- If these interventions are not enough, the school starts a collaborative, unbiased and timely process to formally evaluate a student's need for special education services.
- The school team regularly reviews the results from the identification process to ensure that certain student groups -- particularly students of color, low-income students, and English-language learners -- are not over-identified as having a disability.
- The school team proactively communicates with families at every step of the identification process.

CHAPTER 4

CATCH ME WHEN (OR BEFORE) I FALL



The school team regularly tracks every student's behavioral, social-emotional and academic progress to ensure they don't fall behind.

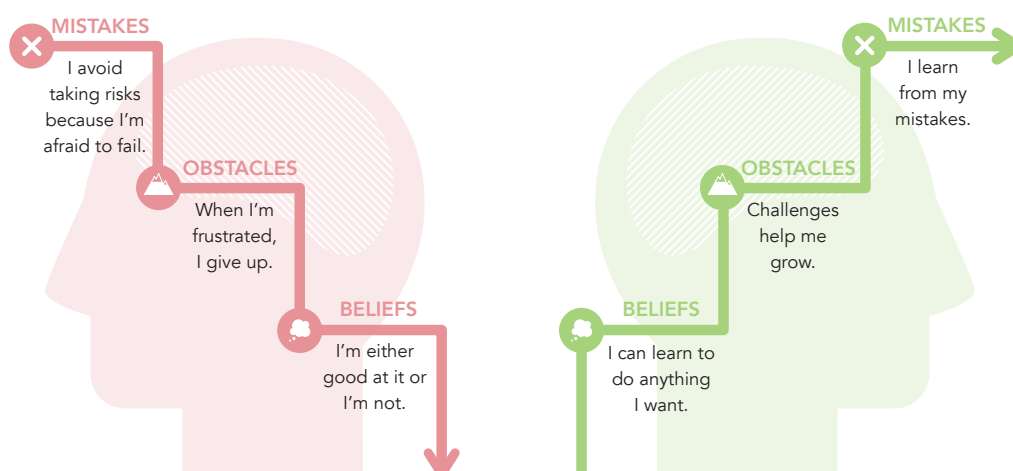
THE PROBLEM: A DISABILITY DIAGNOSIS OFTEN BECOMES A STUDENT'S DESTINY

Once a student is identified as having a disability, educators often have a fixed perception about what that student needs. Some believe that a diagnosis of a disability inherently means the student will always struggle in the same way. These perceptions can end up trapping students in certain interventions or settings for far too long.

But like all students, students with disabilities grow and change over time. Their needs can shift. They can easily move from needing one kind of support to another type to needing nothing at all. It is important that teachers craft their instruction based on how these needs evolve. Just because a student needs a certain kind of support one semester doesn't mean they'll need that same support again later on. As Ryan Parry, who oversees special education for the Covina-Valley Unified School District, said, "Special ed is not a placement. It's a service."⁶⁵

People with a **"fixed mindset"** believe that intelligence is something you're born with and doesn't change over time.

People with a **"growth mindset"** believe that intelligence can be developed with practice and hard work.



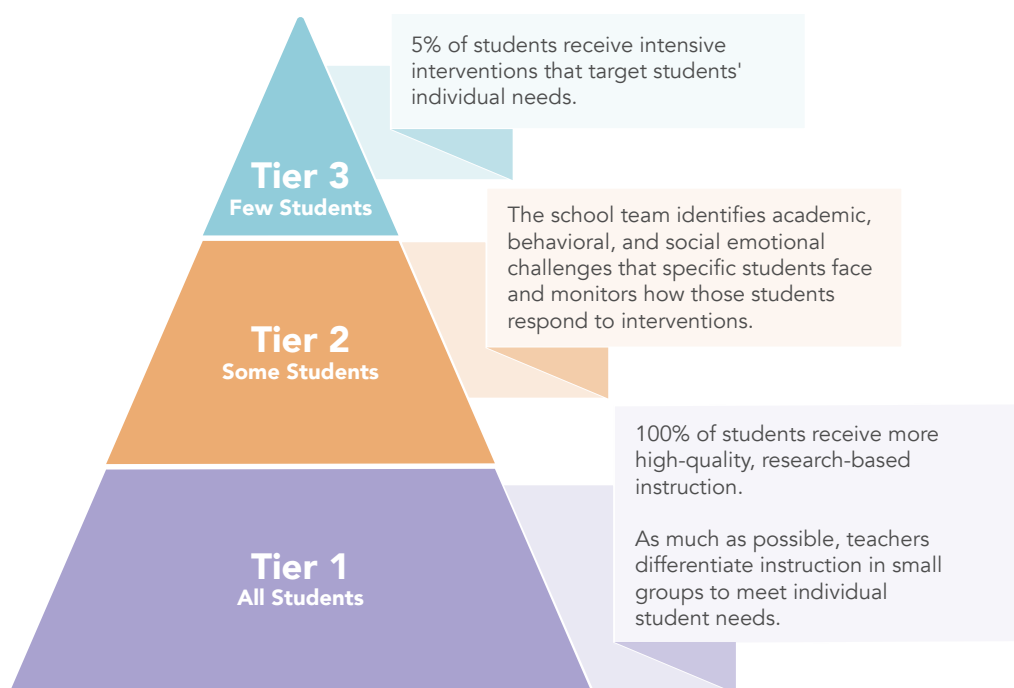
When school teams reject a **"fixed mindset"** and instead treat students with a **"growth mindset,"** they build a school culture where students feel comfortable to take risks, learn from failure, and can develop their intelligence over time through hard work.

Source: Content adapted from *Mindset: The New Psychology of Success* by Carol Dweck

THE SOLUTION: USE “TIERED INSTRUCTION” TO GET THE RIGHT SUPPORT TO THE RIGHT STUDENTS AT THE RIGHT TIME

To serve students with disabilities effectively, school teams must look at interventions with a growth mindset. They must believe that special education interventions can – and should – change depending on student needs. To do this, many schools and districts have adopted “tiered instruction.” In this approach, teachers provide three different levels – or “tiers” – of instructional strategies, depending on a student’s individual needs. Teachers closely track how students respond over time. Then they move students from one tier of interventions to another, depending on how fast they progress. If they continue to struggle, the teacher might increase the intensity of the support. If they respond well to the intervention and develop more confidence and independence, the teacher or school might decrease the support.

Tiered Instruction: More intensive support for students who need it most



Source: content adapted from RTI Action Network. <http://www.rtinetwork.org/>

Tier 1 support - Core instruction for all students

In the first level – or “Tier 1” – students receive general instruction in their general education classroom using the standard curriculum. Schools use broad instructional or behavioral strategies to support all students. Tier 1 interventions might include a teacher standing near a student when giving instructions, using visual cues, giving a student more structured note-taking templates or outlines, and/or assigning a student a seat near the teacher or a seat in an area with few distractions. Ideally, school teams would expect this level to meet the needs of about 80% of students.⁶⁶ At multiple points throughout the year, teachers evaluate how well students are responding to the general instructional approach. For example, a school might adopt a research-based reading curriculum and screen all students for reading problems three times per year to determine which students might need supports beyond the school-wide reading curriculum.

Tier 2 support - Group interventions

However, around 15% of students may still be struggling with just traditional instruction. These students are then moved to “Tier 2.” At this level, students receive more intensive instruction in smaller group settings to help them access the general curriculum or additional support from their classroom teacher. This could include a behavior contract, a reward system, or modified assessments. It could also include repeated opportunities for practice.

For example, Tier 1 students could have guided reading three times a week, while Tier 2 students could have it five times a week. These interventions can be administered by an educator with special training, such as a reading specialist. But for smaller schools or those with fewer resources, general education teachers provide these interventions on their own. The interventions may take place over the course of several weeks, with the school team checking in over time to monitor progress.

Tier 3 support - Intensive interventions

Even with Tier 2 support, approximately 5% of students may still not meet their learning or behavior goals. These students are moved to “Tier 3.” At this level, students often work one-on-one with a specialist for longer periods of time. In contrast, students in Tier 2 can usually manage larger groups for shorter amounts of time. Tier 3 students may need more individualized instruction. Sometimes they may need a custom-made curriculum that covers the foundational skills they may have missed. At this point, schools may also evaluate these students to determine what special education services they may need on an ongoing basis.

Research-based intervention processes have helped schools implement tiered instruction more effectively. One of the most common forms of tiered instruction is called Response to Intervention (RtI), which focuses on academic instruction and support. Positive Behavior Interventions and Supports (PBIS) focuses on behavioral support. More recently, districts and schools have begun shifting toward Multi-Tiered Systems of Supports (MTSS). MTSS draws on both RtI and PBIS to address both academic and behavioral needs. Research has shown that these tiered systems can improve both academic performance and behavior. This is particularly true for low-income students and students of color.⁶⁷

The key to all these approaches: they have highly trained and supported staff who know how to organize students into levels of escalating need and flexibly adapt to the changing needs of students over time. Students move between these tiers over the course of the year based on how they respond to various interventions and assessments. Depending on their progress, a student might move between Tiers 1 and 2 fluidly over the course of the year in one or more subjects. They also can move into Tier 2 and right back to Tier 1 after learning knowledge or skills they had missed in prior years.

Of course, legally under IDEA, parents have the right to ask schools to assess students for special education services immediately, instead of going through the tiered instruction process. In fact, in 2011, the U.S. Department of Education specifically stated that RtI could not be used to delay or deny special education identification. But when done well, the gradual progression of RtI can help ensure that teachers do not unnecessarily shuffle students with disabilities into the most intensive tier and separate them from the rest of the students. Instead, teachers move them into a more intensive tier only when data shows that they will truly benefit from that level of support.

Tiered instruction helps schools take a proactive – not reactive – approach to student support

These approaches allow schools to meet student needs without placing them in unnecessarily restrictive settings. As Chapter 3 “Find Me” described, schools must work to ensure they quickly and accurately identify students for special education services. However, identification should not be a standalone process. It should be part of an overall intervention system that provides support to all students, measures if it’s working, and increases the supports when necessary.

Educators in Kansas have seen positive results since the Kansas State Department of Education adopted MTSS in 2007. “As we began to implement effective intervention at each tier, we began to see fewer children being referred to special education,” said Alexa Posny, then state director of special education in Kansas.⁶⁸ When fewer students are referred, students are less likely to be over-identified and those who truly do have special needs get more of the resources they need.

Tiered instruction benefits all students

More recently, schools and districts have expanded their use of tiered instruction to cover all students. Federal law lets schools use up to 15% of their special education funds for students without disabilities who nonetheless need more support.⁶⁹ This makes it easier for schools to use tiered instruction with all students.

Since this model is more flexible, teachers can move students from one tier to the next based on the most current data. This allows them to offer more targeted support to struggling students – whether or not they have a disability. This means that tiered instruction can “blur” the lines between general and special education, often in positive ways. Researchers from the Center on Reinventing Public Education (CRPE) looked at two charter school networks (STRIVE Preparatory Schools in Denver and Uncommon Schools in New York City). They found they both successfully used tiered instruction to ensure that “students with special needs have similar education experiences and expectations to their general education peers.”⁷⁰ Students with disabilities did indeed receive more support from special educators. But researchers also observed that other struggling students were also included in this support, even though they didn’t have an IEP.

Another example of a school using tiered instruction is Lafayette Elementary in San Francisco. Principal Heath Caceres says that at Lafayette, it’s possible for a student with a disability to still be in Tier 1, while a student without a disability can be in Tier 3. This flexible model allows teachers to ensure that all students get what they need, when they need it.

Tiered instruction helps students “exit out” from special education interventions if they no longer need them

By addressing needs as they emerge, school teams can actually decrease the number of students who require an IEP. While “exiting out” of special education should not be the goal for all students with disabilities, some students may develop independent skills and no longer need extra services. Research has found that when some schools train teachers in a tiered model of support, “special education leaders in these schools say that many students who may have acquired IEPs in other schools no longer require them.”⁷¹ More than half of students who receive speech services ultimately after a while don’t need them anymore, leaving far fewer who need further evaluation for disabilities.⁷² Under an effective system of tiered instruction and accurate identification, services go to students who need them the most when they need them -- rather than to students who may only need services for several years.

For example, the rural Sanger district in California’s Central Valley adopted RtI in 2005. When schools trained teachers in providing tiered support for students, they met the needs of many students without using special education services. After adopting RtI, the district’s rate of special education identification fell from 10% to 7%. Special Education Director Kimberly Salomonson believes this rate more accurately captures students’ likelihood to have a disability in her schools. When tiered instruction helps students reach grade-level success in the general education classroom, she believes “they are not special education and should not be labeled as such.”⁷³

Similarly, at KIPP Raíces in Los Angeles, whenever possible, the school team makes an effort to exit students from special education services if it is clear that they no longer need them. “The goal is really to have kids become independent,” said Medalla Dimapindan, the school’s lead resource specialist.

Of course, some students with disabilities will require special education services throughout their entire school career. But for other students, a disability diagnosis does not necessarily mean they need the most intensive interventions. The most effective schools use the data from tiered instruction to determine what interventions work and which can change. They also use data to ensure that students who are no longer struggling can “exit out” when they no longer need extra support.

WHAT ADVOCATES CAN DO TOGETHER

HOW TO ORGANIZE
FOR SYSTEMIC CHANGE



**CATCH ME WHEN
(OR BEFORE) I FALL**

The school team regularly tracks every student's behavioral, social-emotional and academic progress to ensure they don't fall behind.

WHAT TO ASK

- Do school staff consistently use a shared school-wide system to monitor and provide support to all students, both with and without disabilities?
- Are all students assessed for strengths and needs, and is student data driving decisions about instruction, behavior, interventions, and resource allocation?
- Do school team members consistently provide accommodations and modifications that enable students to access the curriculum?

WHAT TO LOOK FOR

DISTRICT / CHARTER SCHOOL NETWORK

- The district / charter school network holds each school accountable for monitoring data to detect trends in student performance at the individual, classroom, and school level and adjusts instruction accordingly. Principals are evaluated based on their ability to do this, and their managers intervene and support if they struggle.
- The district / charter school network ensures that all teachers are trained in the best ways to support students with disabilities by allocating funding for both general education and special education teachers to participate in professional development focused on supporting students with disabilities.
- The district / charter school network provides funding for teams of teachers from the same school (not just individual representative teachers) to attend professional development together and collaboratively adjust school-wide practices to better support students with disabilities.
- The district fully funds intervention programs so programs can succeed at the school level.

SCHOOL / CLASSROOM

- Teachers consistently use a shared school-wide system to monitor student data and provide support to both students with and without disabilities. A multidisciplinary team of teachers and staff is responsible for looking at school-wide data and designing interventions to address academic, behavioral, and social-emotional needs of all students.
- Teachers can explain and share documented evidence of the steps they have taken to support specific students, how the students responded, and then how they adjusted.
- The school's professional development calendar includes specific sessions on supporting students with disabilities or integrates special education topics into general training sessions.
- The school reserves time each week for collaboration between special education teachers and the general education teachers.
- All students receive some small-group or individualized instruction every day.



WE KNOW WE'VE SUCCEEDED WHEN:

- The school team provides a wide range of increasingly intensive supports to meet the needs of all learners, including those who are struggling and those who are advanced, and proactively works to prevent academic and behavioral challenges. This includes universal screening, early intervention and frequent progress monitoring, all while supporting students to learn and grow independently.
- Comprehensive, research-based intervention processes – like multi-tiered system of supports (MTSS) and Response to Intervention (RTI) – help schools identify students with disabilities earlier and more accurately.
- Both general and special education teachers at the school have strong training in special education interventions, particularly for the most common disabilities among their students.

CHAPTER 5

MEET ME WHERE I AM AND CHALLENGE ME



The school team provides support for students with disabilities, yet still engages them in rigorous, grade-level content every step of the way.

▶ **THE PROBLEM: “WATERING DOWN” INSTRUCTION DOESN’T HELP STUDENTS WITH DISABILITIES**

Effective teachers look for ways to differentiate instruction between groups and individualize instruction for specific students. But too often, instead of maintaining the rigor of the material and building students up to that level, school teams “water down” curriculum for struggling students to below the grade level of an average student.

Sometimes this happens because teachers are not given the resources or professional development to understand how to differentiate instruction effectively. Without support, instead of helping students with special needs tackle challenging material, they often lower the bar and make it easier. This does a disservice to these students and doesn’t prepare them to tackle even tougher challenges later on. As Chapter 1 “Believe In Me” explains, this lowers expectations for all students instead of giving them the rigor they deserve -- and need -- to accomplish their future goals.

All students benefit from content that challenges them. Of course, it is unrealistic to hold students with very severe disabilities to the same standards as every other student. But often school teams only give students with moderate disabilities curriculum that matches their comfort level and don’t provide any academic curriculum at all to students with severe disabilities. This doesn’t give these students the chance to grow. With the right support in place, many of these students can rise to challenge.

When these students don’t receive challenging material in one grade, it sets them up to be unprepared for challenging material in the following grade, and eventually in college, career, or life. Rigor, with appropriate support, matters at all levels. If school teams constantly water down materials, these students will never have a chance to reach their potential to meet or exceed grade level standards.

▶ **THE SOLUTION: USE SPECIAL EDUCATION MODIFICATIONS THAT BENEFIT EVERYONE THROUGH UNIVERSAL DESIGN FOR LEARNING (UDL)**

An important lesson for educators surprisingly comes from the field of architecture. By law, architects in the United States have to create buildings that have few barriers for diverse groups of people.

However, when architects make adjustments, they don't just benefit people with disabilities. They also make buildings more accessible for a wide range of people. For example, when buildings have ramps instead of only stairs, they not only help those in wheelchairs. They also help parents with strollers, or people with carts.

In the 1990s, David Rose, Anne Meyer and colleagues at the Center for Applied Special Technology (CAST) developed a theory that applied this same idea to education. They called it Universal Design for Learning (UDL) and based it on the most recent research on brain development and how people learn. Rather than teaching to the middle, in this approach, teachers "engineer" lesson plans, considering how they can make content accessible for the widest range of students without watering it down.⁷⁴ When the government reauthorized the Individuals with Disabilities Education Act (IDEA) in 2004, they officially included the term "universal design" within the federal law.⁷⁵

At Lafayette Elementary School in San Francisco, Principal Heath Caceres stresses this point about UDL with his staff: "Everybody has a disability. At some point, everyone has struggled to understand or accomplish something without extra support." By remembering universal design when creating lessons, teachers make sure everybody can access content in the best ways they can.

Research supports this theory. Research from the University at Albany found that "effective literacy instruction for special education students in the early years resembles effective instruction for all students."⁷⁶ Some recent studies have shown that when classrooms use differentiated instruction and UDL, they have higher levels of access and learning among all students.⁷⁷

"We used to think our role was to make sure general education teachers knew who was in their rooms so they could make the right modifications," said Michael Tefs, Superintendent of Wooster City Schools in Ohio. "Now, we know our role is to provide time for all teachers to work together to improve instruction for all students."⁷⁸

This means that great special education ends up being great general education. Of course, for some students with more severe disabilities, school teams must still provide one-on-one support specifically catered to their needs. But often, when teachers design their lessons for the widest range of learners possible, these modifications make instruction more effective for everyone.

"We want the paraprofessionals to make that transition from 'I'm just serving Peter' to 'I'm serving everybody,'" said Lafayette Principal Caceres. "We want them to be thinking, 'I'm going to focus on Peter and make sure he's getting what he needs, but I'm going to be able to have a relationship with every student in this class.'"

UDL has become even more important now that student populations are even more diverse. Teachers can't rely on a "one-size-fits-all" approach. Instead, they should consider how adapting a lesson for one group of students can ultimately help all students.

THREE KEY PARTS TO UNIVERSAL DESIGN FOR LEARNING

1 - Present content in different ways

First, UDL emphasizes presenting content in multiple ways. This allows students with different learning styles to access the information equally. For example, for one lesson, a teacher gives all the eighth grade students in her class a book at a ninth grade reading level. But she gives her struggling students -- whether they have a disability or not -- a shorter passage to read and has them read it several times.

She also provides these students with guided notes to help them summarize each part, and covers a list of vocabulary words with them before reading to make the text less overwhelming. Strategies like this still expose struggling students to high levels of rigor, but in more bite-sized formats.

In math, if a student learns best from hands-on activities, teachers can give her clay, food or wooden blocks in order to practice numerical problems.⁷⁹ To be clear, teachers should still expect students with moderate disabilities to arrive at the same answer as every other student and understand the same standards. Teachers can simply allow students to get there on different paths.

2 - Allow different forms of assessment

Most of the time, teachers have students show what they've learned through written tests and essays. But many Common Core standards do not require that students must show their learning this way. UDL stresses that teachers should allow students to express what they've learned in many ways. For example, when teaching students narrative techniques like dialogue and plot, teachers could ask students to "draw a cartoon strip, do an oral presentation, complete a work of art, compose a musical piece, or write a graphic novel." Students can also analyze dialogue and plot in a short video or a live interview, instead of a written essay if the standard is measuring the students' ability to analyze dialogue rather than their ability to write an essay.⁸⁰

3 - Build upon a student's strengths

Recent research on neurodiversity shows that a disability can also provide unique strengths to a student that can work to their advantage (see Chapter 2 "Include Me").⁸¹

But too often, special education focuses instead on student deficits. In the past, special educators often taught students how to "live with their disability." In contrast, a neurodiversity-based approach teaches students how to maximize their strengths and minimize their weaknesses. That ends up benefiting everyone.

Ultimately, great special education instruction doesn't make content "easier." Instead, it combines high expectations with the right support. Through intentionally designing lessons that cater to all students, including students with disabilities, school teams can ensure that all students feel supported while also being challenged.



WHAT ADVOCATES CAN DO TOGETHER

HOW TO ORGANIZE
FOR SYSTEMIC CHANGE



MEET ME WHERE I AM
AND CHALLENGE ME

The school team provides support for students with disabilities, yet still engages them in rigorous, grade-level content every step of the way.

WHAT TO ASK

- How does school staff differentiate instruction and interventions based on student needs?
- How do they make sure all students feel supported in taking on rigorous material that they find challenging?

WHAT TO LOOK FOR

DISTRICT / CHARTER SCHOOL NETWORK

- The district / charter school network leaders train principals how to analyze data to make decisions about differentiating instruction and can explain how principals train teachers in that same process.

SCHOOL / CLASSROOM

- The school provides accommodations so that students with disabilities can reach the same expectations as their peers and only provides modifications (changing the content/expectation) when absolutely necessary. Teachers can communicate a rationale for modifications and accommodations.
- All students, regardless of whether they have a disability, have an individualized learning plan tailored to their unique needs.
- The school team meets before any major transition in the student's education (e.g. moving from elementary to middle school and graduating high school) to align with the student and family on goals, anticipate challenges, and develop a support plan.
- The school has a culture where having different paths to achieve a common goal or outcome is normal and celebrated. The principal, teachers and students can share stories that show this, and students are encouraged to take different approaches to solve problems and reflect on those differences.
- The school trains both general and special education teachers how to use the principles of Universal Design Learning in their lesson planning.

A photograph of a female teacher with curly hair, wearing a white shirt and a blue lanyard, gesturing with her hands while talking to a male student with red hair wearing a red and blue plaid shirt. They are in a classroom with a green wall and a microscope in the background.

WE KNOW WE'VE SUCCEEDED WHEN:

- Instruction is individualized so that all students can meet the state standards.
- Teachers provide support and services to address students' specific disabilities and build upon their unique strengths, without allowing a diagnosis or a label to limit their high expectations for each and every student.
- As much as possible, teachers measure students with disabilities on the same tests and assignments as general education students. This assures they are on track toward high school graduation, college and a successful career.

CHAPTER 6

KNOW ME



The school team and families all work together to understand the needs of every student from the student's first day and track the student's progress over time.

► **THE PROBLEM: THERE'S NOTHING INDIVIDUALIZED ABOUT MOST INDIVIDUALIZED EDUCATION PLANS (IEPS)**

A school cannot serve students with disabilities well unless they also know them well. When schools invest the time to understand their students well, interventions are more likely to succeed.

Schools are required by law to develop an Individualized Education Plan (IEP) for students if their disability affects their access to a "free and appropriate education." This plan should be co-created by the parents, general education teachers, special education teachers, the school/district psychologist, and any other relevant members of the IEP team. Depending on age and severity of their disability, students may also be involved in the process. An IEP keeps everyone on the same page about students' goals, as well as the best ways to support them in the classroom and at home.

But in many schools, this isn't what the process or plan looks like. That isn't because school leaders and teachers don't care. Too often, they aren't given enough time, training or support. School staff have little time to consider the unique strengths and weaknesses of each student, and instead "copy and paste" one intervention plan for every student that comes afterwards.

► **THE SOLUTION: CREATE SCHOOL-WIDE SYSTEMS THAT HELP TEACHERS LEARN MORE ABOUT EACH STUDENT'S INDIVIDUAL NEEDS AND GET AHEAD OF CHALLENGES**

At the most effective schools for students with disabilities, educators use the school-wide systems and tools to communicate with each other about student needs. They use the same data-tracking tools and assessments to document the patterns and trends of each student. In these schools, general education and special education teachers also have time each week to reflect on data, collaboratively plan supports that students need, and work together to ensure that a student's IEP reflects the specific needs of the student.

At KIPP Raíces, the principal sends out a monthly survey to teachers, asking which students need help. Teachers are required to identify at least three students. The school team then develops intervention plans that they monitor on a weekly and monthly basis. Teachers also list what interventions they have already tried, and current teachers can also review past year comments at the beginning of the new school year. The school team learns all this information before they

have a “Student Support Team” (SST) meeting, where they determine an action plan for struggling students. “That way, we don’t waste time trying things others have already tried and that haven’t worked, or we know to keep going with strategies that have worked before,” said Principal Yesenia Castro.

Engage parents to get valuable insight into student needs

Research has shown that parents play an important role in driving student achievement. But family engagement is even more critical for students with disabilities. A 2012 Harvard Family Research Project brief noted that for children with disabilities, families are not only advocates for their children. They also have insight into their children’s specific needs that teachers may not have.⁸² Research from the University of Florida found many ways in which this insight helps parents support schools. In some examples, parents helped ensure teachers placed students in appropriate classrooms. Other times, parents helped teachers monitor student progress. Parents also provided teachers with ideas for adapting instruction to meet the needs of their children.⁸³

A 2016 report by the California Charter Schools Association highlighted several parent engagement strategies from effective schools. Some facilitated parent trainings on how to support students with disabilities. Others had all general education teachers meet with students in small groups outside of the school setting. This helped teachers get to know them better and determine the best ways in which to support them. One school expected each of its general education teachers to do twenty of these check-ins with parents per year. At other schools, all teachers could request home visits when they noticed a student struggling academically, socially or emotionally.⁸⁴

Make data guide the conversation

When making decisions about students with disabilities, many schools only look at a student’s annual test results. But the most successful schools use multiple data points to track progress all year long, and adjust instruction. As discussed in Chapter 4 “Catch Me When (Or Before) I Fall,” the most effective schools have an organized system for tracking data about their students. That helps schools understand each student’s strengths and weaknesses more clearly and track interventions and progress over time.

At KIPP Raíces, the SST process described above doesn’t just rely on teachers’ observations. Teachers base their meetings on concrete data they’ve collected on each student over time. Before an SST meeting happens, teachers fill out a form with students’ areas of strength and challenge, as well as the interventions they’ve tried. They also include each student’s results on the Measures of Academic Progress (MAP) assessment of students’ growth in learning, data from their “running records” that teachers use to measure reading levels, writing samples, and any other information that helps illustrate the challenge and lack of progress. Teachers gather these same types of data every three to six weeks for follow-up SST meetings with the school and family to determine if things have improved.

“We’re constantly looking at data,” said Castro. “Parents are rarely surprised by student needs, because they are steeped in their own student’s data all year long.”

The most effective schools for students with disabilities also assess students multiple times throughout the school year, according to a 2016 California Charter Schools Association report on special education.⁸⁵ Some schools also encouraged teachers to give students daily “exit tickets” - a quick assessment question students have to answer before leaving class. This helps teachers check how much students have progressed each day.

At Lafayette Elementary School in San Francisco, school leaders and staff share data on student performance and academic objectives across the school, and make school-wide decisions based on what they find.

Data helps the school team make decisions about how to use resources, make interventions in behavior and instruction, and when to move students from one area to the next. The crucial part: it's not just one teacher doing this on her own. The entire school team works with data together in order to make better systematic decisions across the whole school.

Invest time in creating strong IEPs

An IEP should not be a vague summary of a student's disability and a generic set of interventions. It should reflect the unique strengths and weaknesses of each student. At Two Rivers in Washington, D.C., the school focuses on making sure that IEPs are "tailored to the specific needs of the student, goals are tied to clear standards and data, and goals allow tracking of progress and adjustment of instruction to meet their needs."⁸⁶ Though this may sound like it's just meeting the basic expectations for an IEP, very often most IEP goals are not tied to grade-level academic standards or any concrete measures of student performance at all. When school teams use grade-level expectations or other concrete measures as reference points within the IEP, they can help teachers, parents, and students develop a clear picture of what the student needs to work on to demonstrate growth.

The most effective schools prioritize getting to know their students early. They work together with families to get as much insight on a student as possible. Then they use data to help determine what kinds of support work best. That goes beyond creating a strong IEP. It means taking a holistic view of each student that includes data, as well as personal insight into their strengths and weaknesses.



WHAT ADVOCATES CAN DO TOGETHER

HOW TO ORGANIZE
FOR SYSTEMIC CHANGE



KNOW ME

The school team and families all work together to understand the needs of every student from the student's first day and track the student's progress over time.

WHAT TO ASK

- Do school teams build strong, trusting relationships with students with disabilities that help them to strengthen instruction and support?
- How do they use data to regularly track students' progress and understand their unique strengths, weaknesses, and needs?
- Does the school team authentically engage a wide range of school staff and the parents in the IEP process to ensure the IEP is a meaningful tool that guides the instruction for that student?

WHAT TO LOOK FOR

DISTRICT / CHARTER SCHOOL NETWORK

- The district / charter school network leaders set policies that encourage school staff to frequently communicate with parents about student progress and provides technology that makes it easy to do so.
- The district / charter school network leaders have regular town hall or open forum meetings with families to hear concerns regarding special education issues at the district level.
- The district / charter school network leaders have an easy-to-use system that allows all teachers, administrators, school psychologists, and the family to easily access a student's IEP online and obtain a hard copy.

SCHOOL / CLASSROOM

- The school and family communicate weekly about student progress and challenges, and at least quarterly about whether or not the student is accomplishing academic goals.
- Teachers know and can articulate each student's strengths, interests and goals, beyond what's written in the IEP.
- Students know their data and can talk about where they are succeeding and where they need help.
- The school is welcoming to students, and students feel connected to the staff. Students can identify several adults on campus whom they can go to for support - people whom they can seek out if they have a problem.



WE KNOW WE'VE SUCCEEDED WHEN:

- The school team builds strong and lasting relationships with students and families.
- Educators use data regularly to measure the academic progress and social-emotional/behavioral development of all students, including students with disabilities, and track whether interventions are working.
- The school team communicates regularly with parents and students about interventions and progress, both inside and outside of school.

CHAPTER 7

INVOLVE ME AND MY FAMILY



The school team engages students in decisions about their own learning and engages parents and guardians as equal and important partners in a child's education.

► **THE PROBLEM: AT MANY SCHOOLS, PARENTS AND STUDENTS AREN'T AS INVOLVED IN THE LEARNING PROCESS AS THEY SHOULD BE**

Research has found that student and parent engagement is critical for students with disabilities. But it's also time-consuming and difficult for teachers who are already strapped for time. As a result, special education interventions often happen to students, not with them. A former high school special education teacher, Toni R. Van Laarhoven, told Education Week that often students in IEP meetings "just sit silently, or people would ask them yes-or-no questions."⁸⁷ Education Week also reported that a 2004 federal longitudinal study found that about seven in 10 students with disabilities said they understood what services they would need to deal with their disability. However, less than one-third of these students said they gave their opinions on services to the professionals they worked with.⁸⁸

► **THE SOLUTION: STUDENTS DO BETTER WHEN THEY'RE INVOLVED IN THEIR OWN LEARNING**

School teams need to invest their resources and energy in engaging students and their families. Support is crucial. But ultimately, the goal should be that students with disabilities learn how to ask for what they need. Research has shown that for students with disabilities, a student's sense of self-determination is a particularly important predictor of future academic success.⁸⁹ The National Secondary Transition Technical Assistance Center also identified self-advocacy as an important predictor of future education and employment.⁹⁰

The most effective schools for students with disabilities help build these skills early. For example, at Lafayette Elementary School in San Francisco, staff and school leaders begin conversations with students about self-advocacy around fourth and fifth grade. "We talk with parents about finding ways that a student can cope with their disability even without these supports," said Principal Heath Caceres. "Instead of only saying, 'They need this extra thing' or 'We need to modify this more,' I also want to ask, 'How can they take control of their own learning?'"

This isn't necessarily specific to students with disabilities. All students benefit from taking ownership of their own academic goals and progress. As discussed in Chapter 4, many schools can use "Tier 1" interventions to help promote self-advocacy among all students. For example, teachers can create charts where students color in their reading levels as they advance.

When teachers expect all students to take responsibility for their own learning, it makes it easier for students with disabilities to also have a voice and ask for what they need.

Involve students in developing and revising their Individualized Education Plan (IEP)

Perhaps one of the most important ways to promote self-advocacy is to involve students in their own Individualized Education Plan (IEP) or 504 plan (another plan guaranteed under civil rights law that protects students with disabilities from discrimination and requires schools to meet their needs). “Student Voices,” a recent report by the National Center for Learning Disabilities, researched students with learning and attention issues. They found that students who took an active role in their IEP, 504 plan, and transition planning meetings were more likely to self-advocate for their needs. They were more likely to take initiative in planning for their future after high school in general. They were also more likely to enroll in postsecondary education.

At Two Rivers Charter School in Washington, D.C., which serves students from pre-K to eighth grade, some students lead their own IEP meetings. Beforehand, the student picks assignments from school to put in a portfolio.

According to the school’s website: “Whenever possible, the portfolio also documents the process the student went through to produce each piece of work, meaning that a portfolio includes multiple drafts and the feedback the student received from peers and teachers. Finally, each piece includes a written reflection about the process of creating the work.”⁹¹

At the meeting, the student speaks for the majority of the time. They present their work, reflect on data and feedback, and set their own goals for how to grow in the future. Particularly for students with IEPs, Two Rivers staff believe this helps these students “understand the nature of their abilities and individual challenges” and “develop a clear picture of what they need to work on to demonstrate growth.”⁹²

Of course, student-led conferences and IEP meetings look different depending on the age and readiness of each student. For example, young students can start by simply sitting at the table. Then they can begin generally identifying their likes and dislikes of different classroom settings. Teachers can help students gather materials before their meeting, analyze their work, and set goals. Over time and as students get older, students can gain more ownership over the process. The ultimate goal is that each student learns self-awareness and self-advocacy. Planning these conferences takes time. But Two Rivers believes “student-led IEPs are so powerful that committing to this time is worthwhile.”⁹³

Inform families throughout the year

For students with disabilities, parents bring valuable information and support to the table. However, communication needs to run in both directions. Schools should also inform and consult parents about any incidents that happen at school. At the very least, this means involving parents in the Response to Intervention (RtI) process. Chapter 4 “Catch Me When (or Before) I Fall” describes RtI/MTSS processes in more detail. Schools must keep parents informed when their child is struggling and in need of an intervention. Schools should also involve parents when setting IEP goals for their child and in monitoring their progress.

The Mary Lyon School in Boston, Massachusetts creates “individual student communication plans to manage its connections with every family.” The K-8 school serves around 120 students, and 41% of its students have disabilities. Parents receive daily “logbooks” explaining their child’s progress. According to one Mary Lyon parent, “The school is just as committed to the success and achievement of the special needs students as to any other children in the school. As a parent, it’s reassuring that home and school are working together toward common goals.”⁹⁴ Students feel a stronger sense of support when all stakeholders are on the same page. To do this, schools must commit to spending more time on supporting students and families.

WHAT ADVOCATES CAN DO TOGETHER

HOW TO ORGANIZE
FOR SYSTEMIC CHANGE



**INVOLVE ME
AND MY FAMILY**

The school team engages students in decisions about their own learning and engages parents and guardians as equal and important partners in a child's education.

WHAT TO ASK

- How do the school and district communicate with parents/guardians?
- How are students involved in their own IEP process, and are they learning to independently advocate for themselves within and beyond the education system?

WHAT TO LOOK FOR

DISTRICT / CHARTER SCHOOL NETWORK

- The district / charter school network provides training for psychologists and special education teachers on how to communicate complex topics in an accessible way so that all stakeholders -- teachers, student, family -- truly understand the student's disability, strengths and goals.
- The district requires that each IEP meeting concludes with a short survey to ask families if they felt heard and supported during the process.
- The district trains its special education staff how to run IEP meetings effectively and respectfully to gather family input.

SCHOOL / CLASSROOM

- Students share their strengths and interests at the IEP meeting. And in later elementary grades and beyond, they play a more active role in setting their own IEP goals.
- The school recognizes that parents know their children best and asks for their input on how to better understand and support their students at school. Parent surveys indicate that parents feel they have a clear voice in shaping the goals at the IEP meeting.
- The school provides native language translation to families who need it, as required by law. The school proactively offers these services to families.
- The school team discusses student goals and needs with the family in a straightforward, candid and accessible way. They avoid confusing jargon or acronyms and take the time to explain the diagnosis and approach. During the initial meeting, the school psychologist explains the disability so clearly that everyone understands, has an opportunity to ask questions, and can explain it themselves.
- Parents and other family members work with educators to use the same strategies at home and school.



WE KNOW WE'VE SUCCEEDED WHEN:

- The school team supports students to understand their learning goals and needs. Students are supported to track their own progress and have a voice in developing and monitoring their own IEP.
- The school team and parents work together to holistically understand student strengths and challenges, both in the classroom and at home. Parents participate in developing the IEP, monitoring their child's progress, and adjusting the plan for support.

CHAPTER 8

STICK WITH ME



Given the unique learning needs of students with disabilities, they benefit even more than other students from consistency over time. When school leaders and teachers stay at their school for many years, they develop trusting and supportive relationships with students, families and one another.

► **THE PROBLEM: HIGHLY EFFECTIVE SPECIAL EDUCATION TEACHERS ARE HARD TO FIND AND KEEP**

Nationwide, there is a shortage of special education teachers. In the 2013-2014 school year, 49 states reported a shortage of special education teachers or related service personnel.⁹⁵ In 2011, 51% of all school districts and 90% of high-poverty schools reported having difficulty recruiting highly qualified special education teachers.⁹⁶

This shortage partially comes from the fact that special education teachers are at an increased risk of leaving the profession. Special education teachers leave the profession at nearly double the rate of general education teachers.⁹⁷

There are many different reasons for this. When researchers synthesized research around the topic in the last 30 years, they found that key factors leading to special education burn-out include the lack of administrative support, paperwork, and challenging student behaviors.⁹⁸ Other researchers looked at “role overload” -- the experience of feeling there are “too many unique demands on one’s time and resources.”⁹⁹

Others point to the unique loneliness of the job. As NPR reported in 2015, “On top of the normal demands of teaching, special education teachers face additional pressures: feelings of isolation, fear of lawsuits, and students who demand extra attention. Many are the only special-needs teacher in their grade or their school, or sometimes in the entire district.”¹⁰⁰ Unfortunately, special education teachers face all these struggles daily.

Burnt-out teachers are less effective with their students. A research review showed that students with disabilities who have exhausted or disengaged teachers perform worse.¹⁰¹ These students are “frequently disruptive, struggle socially and emotionally, and attain their Individualized Education Plan (IEP) goals less frequently -- all of which impact academic development.”¹⁰²

When their special education teachers decide to leave the school, students also suffer. Schools with high “relational trust” (good social relationships among members of the school community) have higher student achievement. But this is only possible when educators stay with a school for a long period of time. As some research has argued, because teacher turnover “disrupts the formation or maintenance of these relationships, it may also harm student achievement.”¹⁰³

Many studies have shown that teacher turnover has a disruptive effect on feelings of school community and trust. When teachers leave schools, relationships built between students and schools are lost.¹⁰⁴

Meanwhile, recent research has found that schools serving low-income communities of color find it harder to both find and retain qualified special education teachers.¹⁰⁵ The uneven distribution of these teachers makes it harder for these schools to achieve high results for students with disabilities.

Special education teachers and school leaders are also underprepared

At the same time, even the special education teachers that stay often lack mastery of general education content. Before helping make general education curriculum more accessible to students with disabilities, special education teachers must first have core knowledge of general education topics on their own.¹⁰⁶ And yet, often special education training focuses on “instructional strategies in isolation from the general education curriculum.”¹⁰⁷ As of 2011, only 17 states required a person seeking a special education license to first complete a general education license.¹⁰⁸ In California, only 36% of new special education teachers in 2015–16 had a preliminary teaching credential.¹⁰⁹

According to a report by the Learning Policy Institute, in California the proportion of underprepared new special education teachers has grown significantly in the last two years. “When schools struggle to fill a position with a qualified teacher, they often hire teachers who are still in training or who hold emergency-type permits without training.”¹¹⁰ By 2015–16, nearly two-thirds (64%) of new special education teachers in California had qualifications below the usual standard. As the Learning Policy Institute noted, “In no other major teaching field do interns, permits, and waivers make up a majority of new teachers.”¹¹¹

Unfortunately, principals are also rarely prepared to support students with disabilities. A literature review by the University of Florida found that:

- Most school leadership preparation programs -- even those that “embrace a social justice model of leadership” -- neglect special education. In one study, 53% of principals claimed they had not taken any courses related to special education.
- A review of curriculum of school leadership programs also found that disability and special education topics did not receive much attention. When these topics were addressed, the focus was on the legal technicalities of special education and not on actual instructional practices and strategies.¹¹²

THE SOLUTION: TO SUPPORT STUDENTS WITH DISABILITIES, SCHOOL LEADERS AND DISTRICT STAFF HAVE TO SUPPORT THEIR TEACHERS

Research has shown that students perform better when they have strong academic and social support from teachers, parents, community members, and peers.¹¹³ But this is even more true for students with disabilities, who need stability and consistency more than most. Students with disabilities need ongoing, authentic relationships with caring adults who know and understand them. They need adults who have the knowledge to try different interventions in search of the right solutions, as well as the patience to keep trying when those interventions don’t work. In other words, students with disabilities need great teachers who stick around so that both can grow together over time.

Principals must make smart choices about their team and resources

Principals don't have to be experts in special education. But if they aren't, the most successful principals hire people who are.

Heath Caceres, the principal at Lafayette Elementary School in San Francisco, devotes significant time to actively recruiting teachers who have the expertise his team needs. "I have to realize I'm going to be a learner too. I know a lot of things but I don't know everything. I can't do what Jordan does for PBIS (positive behavioral intervention and supports), or what Mary does for technology. I can bring in my own expertise, but I also should give them license to go ahead and do what they need to do."

Caceres has made strategic staffing choices to make sure teachers have support. The school is a magnet for deaf and hard-of-hearing students and about 16% of students have IEPs. He took advantage of the flexibility he had in his budget to channel resources towards more teachers with special education expertise. He's hired fewer paraprofessionals and more resource specialist program (RSP) teachers. Whereas most RSP teachers have a caseload of around 30 students, at Lafayette they only have 14. The school also works with two local universities to bring in student teachers for extra help. In the 2017-2018 school year, they had 13 student teachers serving 25 classrooms. The principal believes assistance from student teachers has been a critical factor in preventing teacher burn-out. At Lafayette, the student-teacher ratio is now down to 11:1.

Districts can give principals the autonomy to make critical decisions about staffing and where to put resources. They can also provide support and training for principals to navigate complex special education rules. Research has found that when principals put their full administrative support behind special education teachers, students with disabilities achieve more. Ultimately, this leads to better outcomes for students with disabilities or any other students who are struggling.¹¹⁴

Create a culture of collaboration

Administrative support alone is not enough. Teacher retention also requires creating a strong culture that includes collaboration. Research has shown that teachers are more likely to stay when they have productive working relationships with colleagues.¹¹⁵ According to one study examining teachers' working conditions and their job satisfaction: "Teachers have chosen a career in which social relationships are central, and they find that their work with students is influenced heavily by the relationships they form with other adults -- their principal and their colleagues -- in the school."¹¹⁶ The study found that both new and veteran teachers are more likely to stay teaching in a school where all teachers share responsibility for student success.¹¹⁷

A 2013 international survey of middle school teachers by the Organization for Economic Cooperation and Development also found that when teachers are "included in school decision-making and collaborate often with others," they are "more likely to say that teaching is a valued profession in their society." These teachers also report higher levels of job satisfaction and confidence in their work.¹¹⁸ Research has also found that teacher collaboration can lead to improved pedagogy, better student behavior management, more student-centered instruction, and a greater ability to reflect on and adapt instruction.¹¹⁹

In Snowline Joint Unified in Southern California, Pam DeRenard, an elementary special education teacher, said collaboration was crucial to helping students with disabilities succeed during recent reforms: "All of our students learn differently, and having the time for teachers to bounce ideas off each other has been beneficial to our teaching. We learn new strategies and different ways to reach our students. Collaboration is the key to unlocking our special education students' potential."¹²⁰

Teachers shouldn't have to use their break times to find time to collaborate. Research shows that teachers are more likely to stay in the profession when they have access to collaboration on-site, at school, continuously throughout the year.¹²¹ Snowline District gives special education teachers full days to meet and analyze data together, identify strengths and weaknesses, and collaborate on lesson-planning and instructional strategy. When schools and districts provide that time within a teacher's workday, they send the message that collaboration is a priority.

"Grow your own" - Create a pipeline for great teachers to become school leaders

One of the most effective ways to both combat teacher turnover and improve school leadership is to create more supportive networks for dedicated teachers within a district. The book "Turning Around a High-Poverty District: Learning from Sanger" examined how Sanger Unified School District in California made this work. "Typically, when a district loses strong leaders, it launches a search for outside candidates."¹²² Instead, leaders in Sanger made a conscious decision to "grow their own, believing that Sanger's culture and practices are best preserved by those already familiar with them."

From 2008 to 2013, the district filled every single principal and district administrator vacancy with educators within their district. They did this by making several key changes. First, they helped train principals to become strong instructional leaders. Instead of focusing on "managing the school building," they shifted principals' focus to creating a strong, positive school culture. They also held principals accountable for tracking progress on key initiatives.

They encouraged excellent teachers to become school coaches, called Curriculum Service Providers (CSPs). They also partnered with Fresno State University (FSU) to bring an administration credentialing program to the district. CSPs had the opportunity to enroll and attend classes with FSU within the district. This not only made professional development more convenient. It also created "a support group among those enrolled in the program." Many CSPs eventually went on to become assistant principals and principals.¹²³

KIPP Raíces, a charter school in Los Angeles, has also taken this approach. The school has seven full-time and one part-time staff member supporting special education, and the KIPP Los Angeles network office has several program managers that serve all the schools in their Los Angeles network, as well as a director of special education, who has worked in many different special education environments and schools for more than 20 years. Since the school was founded in 2009, the special education team has grown by bringing in specialists from other schools or by promoting teachers or specialists to new levels. The principal has worked at the school since 2009 -- she was a founding first grade teacher -- and each year more than 90% of teachers return to the school.

KIPP LA also strives to provide as many services as possible in-house, rather than contracting services out to an external provider. "This way we can actually control the quality of our services," said Kim Dammann, KIPP LA Managing Director of Special Education. "It takes someone who works within the team on an ongoing basis to really meet kids' needs. It's getting to know the teachers and students and understanding the culture, and going above and beyond to help them with whatever they need."

WHAT ADVOCATES CAN DO TOGETHER

HOW TO ORGANIZE
FOR SYSTEMIC CHANGE



STICK WITH ME

Given the unique learning needs of students with disabilities, they benefit even more than other students from consistency over time. When school leaders and teachers stay at their school for many years, they develop trusting and supportive relationships with students, families and one another.

WHAT TO ASK

- Do the district, CMO and/or school retain special education teachers at the same rate as other teachers? How do they proactively avoid burnout? Do they provide training and support to staff and allocate resources to make sure that workloads are manageable?
- Do they support the growth of staff with ongoing professional development and coaching? Are there strong pathways to develop talent from within (like paraprofessionals training to become teachers)?

WHAT TO LOOK FOR

DISTRICT / CHARTER SCHOOL NETWORK

- Retention rates for special education teachers and paraprofessionals are equal to or stronger than those of general education teachers.
- The district / charter school network keeps special education teachers at the same school to ensure consistency, rather than rotating them to a different school from one year to the next.
- The district has training and credentialing programs in place to support experienced paraprofessionals to become teachers.
- The district has clear standards and expectations for special education teachers, including an instructional teaching rubric.

SCHOOL / CLASSROOM

- The school leader has developed strong systems to train, coach, and support special education teachers. These systems are not managed separately from the support and development of general education teachers. Special education teachers typically report directly to the principal, not an external supervisor.
- Special education teachers receive coaching and feedback about how they teach and support students, not just about IEP implementation and compliance. Teachers report that the feedback is valuable and helps them grow in their practice.
- Some members of the school's leadership team (principal, assistant principal, deans, department chairs, grade-level chairs, etc.) have special education expertise.
- The school allocates resources and hires sufficient staff in ways that best support students with disabilities. They ensure that special education staff have reasonable caseloads of students.
- The school allocates resources so special education staff provide support to students across one to two grade levels (maximum) OR one to two subject areas (maximum), instead of supporting many different grades and subjects.



WE KNOW WE'VE SUCCEEDED WHEN:

- Teachers and other staff actively collaborate to support the needs of students.
- The school team supports special education staff with coaching, professional development, and additional planning time so they can help students succeed.
- The administrative team creates a professional culture of excellence that makes teachers want to stay.

LAFAYETTE ELEMENTARY

*A diverse and inclusive
neighborhood school in San Francisco*

At Lafayette Elementary School in San Francisco, principal Heath Caceres stresses this to his staff: “Everybody has a disability. At some point, everyone has struggled to understand or accomplish something without extra support.”

It’s this culture of embracing difference that has led to Lafayette’s school-wide success in special education. At Lafayette, students with disabilities are an integral part of the community, and their needs are openly discussed. A disability is simply seen as part of a student’s unique expression of their strengths and weaknesses.

It’s no surprise then that students with disabilities at Lafayette outperform their peers elsewhere in the district and state.

Lafayette is one of the city’s oldest schools, established in 1867. When their enrollment dropped in the 1970s, they developed a range of programs to attract more families, including one for special education. Lafayette now serves around 550 students from kindergarten to fifth grade, and 16% of students at Lafayette receive special education services. Around 30 of these students are deaf and hard-of-hearing.

As of the 2016-17 school year, around half of Lafayette’s students with disabilities were on grade level in math and reading, compared with about 18% of students with disabilities in the San Francisco Unified School District and just 13% statewide. By third grade, most of its deaf and hard-of-hearing students are reading and doing math at grade level and beyond.

In 2016, these strong results helped the school earn a rare Blue Ribbon award, honoring schools that “have demonstrated considerable improvement in the performance of their students from disadvantaged backgrounds.”

LAFAYETTE SCHOOL



What is the secret to success?

There are many things that the team at Lafayette does that drive their school's success. Most important: it's not just one teacher doing this all by themselves. Every single person on the team works together to help serve students best and they've built strong systems to help them do that.

Inclusion makes every student feel welcome

Inclusion is at the heart of Lafayette's culture - both in word and practice. The school's goal is for students with disabilities to be in general education classrooms with other students as much as possible. When you look into a classroom, it's hard to tell which students have disabilities. About half of deaf and hard-of-hearing students spend their entire school day in general education classes and activities, with a visiting teacher who occasionally provides specialized instruction for students who are deaf or hard-of-hearing. The other half split their time between special classes with their deaf and hard-of-hearing peers and general education classes. Each year, Lafayette participates in national "Inclusion Week," in which students discuss and write about what inclusion means to them and how they've felt included or excluded.

Lafayette's key to success - investing in teachers

Lafayette has more teaching staff with training in special education than many other schools of its size. Caceres has prioritized hiring fully certified teachers over paraprofessionals with less training and expertise. He says their expertise has led to more rigorous instruction.

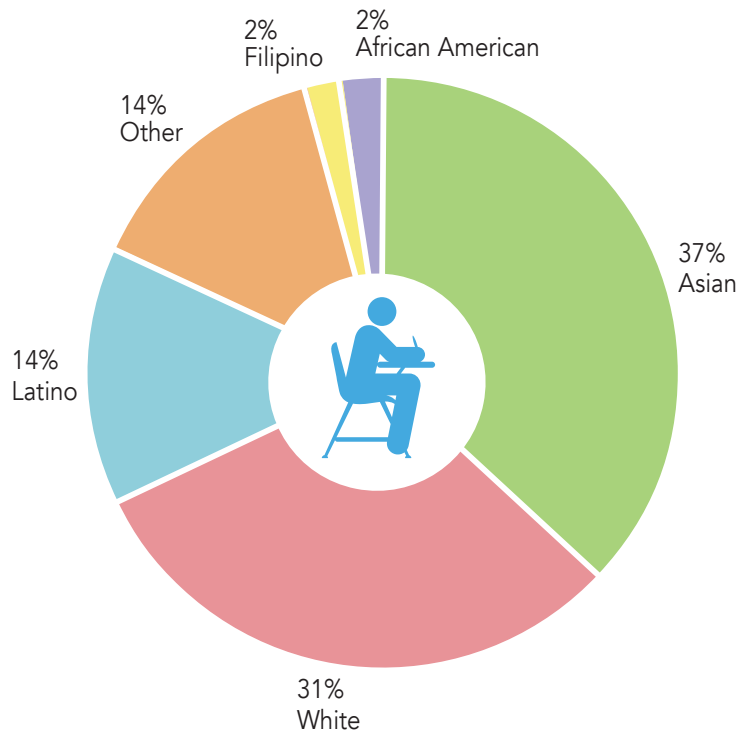
"This was one of the biggest things when I first came here," said Caceres. "I wanted to put more adults who know what they're doing in front of our kids." Caceres took advantage of the flexibility he had in his budget to put more adults in the classroom. That meant hiring fewer paraprofessionals and more resource specialist (RSP) teachers with a full teaching credential in special education.

As a result, Caceres says that special education teachers at Lafayette have a much smaller caseload than usual. Overall, in addition to 22 general education teachers, the school also has three special day class teachers, three resource specialists, and 10 paraprofessionals, all focused primarily on special education. Lafayette also employs a range of other specialists according to its students' needs in any given year, including speech therapists, occupational therapists, and physical therapists.

Lafayette also partners with both San Francisco State University and the University of San Francisco to have at least 10 student teachers each year (with 13 planned for the 2017-2018 school year). This ensures that there are plenty of caring adults ready to help students with disabilities as they navigate the curriculum.

Lafayette serves a diverse group of students

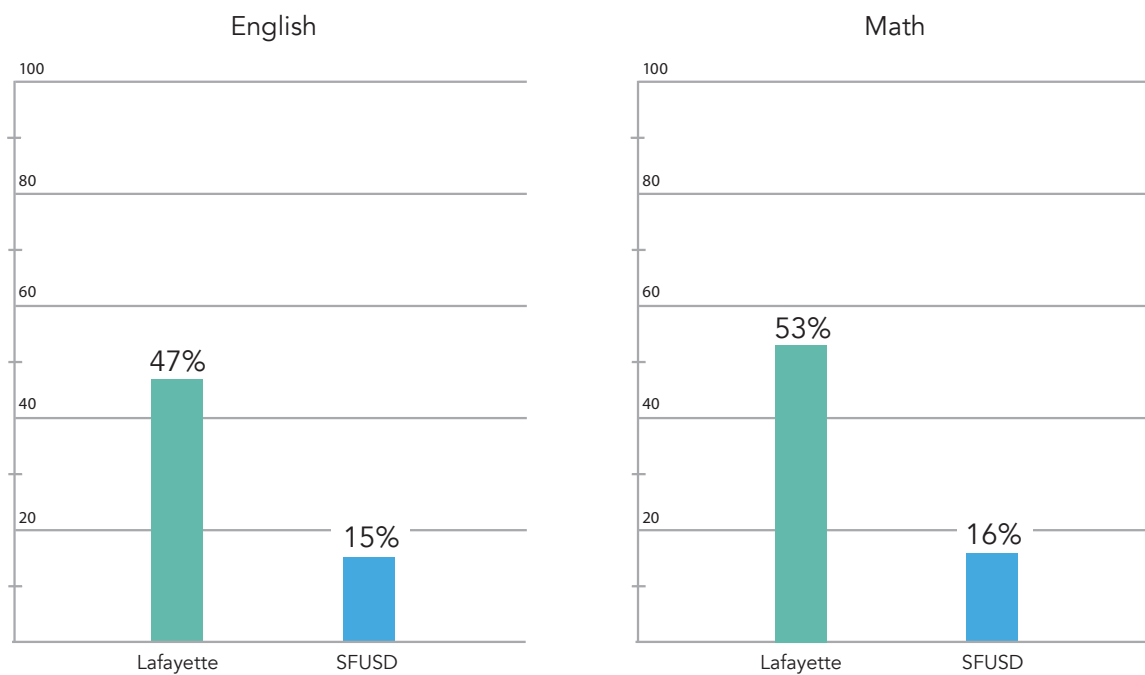
Student enrollment by race, 2016-17



Source: California Department of Education, Enrollment Files 2016-17

Lafayette outperforms San Francisco Unified for students with disabilities

Percent proficient in English and math, 2016-17



Source: California Department of Education, California Assessment of Student Performance and Progress (CAASPP), 2016-17

It also creates a pipeline of new teachers who have already developed skills and relationships within the school community.

Lafayette also regularly supports teachers' professional development. Teachers regularly observe each other and provide feedback. They analyze student work together in in-house professional development sessions and are encouraged to lead in areas they are passionate about, including going to external trainings or bringing in trainers.

When general and special education teachers collaborate, students win

In addition to three "special day" classes for students who need additional support outside the general education classroom, Lafayette has specified inclusion classrooms at each grade level, in which special education teachers and general education teachers co-teach. These teachers use the same curriculum and plan together how they'll teach it each week. All have been carefully selected to ensure they are prepared to work together. They are also trained in the "Power of Two" approach, which focuses on effective ways for teachers to co-teach.

Great special education is simply great education

Many of Lafayette's special education strategies make instruction more effective for all students, not only those with disabilities. Caceres says this is intentional. "We want the paraprofessionals to make that transition from 'I'm just serving Peter' to 'I'm serving everybody,'" he said. "We want them to be thinking, 'I'm going to focus on Peter and make sure he's getting what he needs, but I'm going to be able to have a relationship with every student in this class.'"

This also extends to curriculum. Teachers receive training in Universal Design Learning (UDL). Instead of adapting curriculum only for students with disabilities, this approach encourages teachers to design lessons from the beginning in a way that makes them accessible to every student - a model for "personalized learning" that benefits all students.

Over time, parents of Lafayette students without disabilities began noticing how the extra support of special education instruction benefited their children too. "We have a lot of parents asking us, 'Can my kid without a disability be in a co-taught class too?'" said Caceres. "It kind of becomes contagious."

Students receive support, while also learning to advocate for their own needs

Even with all this provided support, Lafayette also makes sure to encourage student independence. Caceres knows that in order for students with disabilities to succeed academically in the future,

they need to learn how to take care of themselves. To set these students up for long-term success, he focuses on giving students the tools they need to help themselves. “In two years, I want these students to be able to survive in a mainstream class,” said Caceres. “Their disability is not going away, but what they need from us is to learn how they can scaffold their own learning over time.”

At around 4th and 5th grade, staff and school leaders begin conversations with students with disabilities about how they can best manage their disability even without extra support. “Instead of only saying ‘They need this extra thing’ or ‘We need to modify this more,’ I also want to ask, ‘How can they take control of their own learning?’” said Caceres.



KIPP RAÍCES ACADEMY

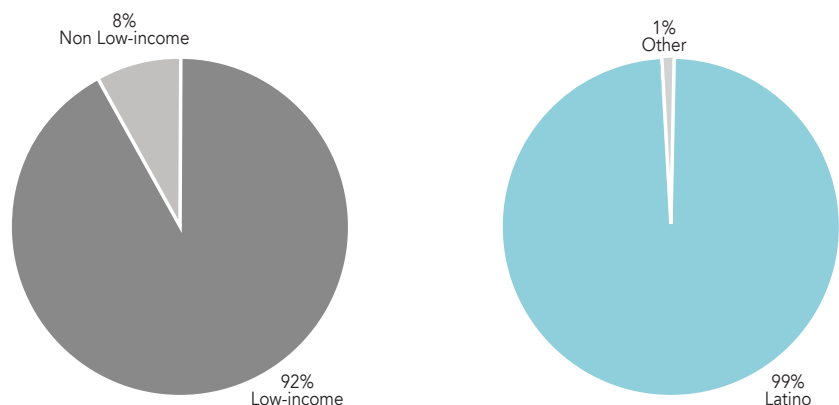
*A low-income school in Los Angeles
where students with disabilities excel*

The staff at KIPP Raíces Academy (“raíces” is Spanish for “roots”) are more than coworkers, said the school’s principal, Yesenia Castro. They’re a *familia*, working together day in and day out to ensure that all students -- including those with disabilities -- learn at high levels. “We are invested in each other’s success, because that means success for all of our kids,” she said.

That attitude and the resulting systems and supports the KIPP Raíces staff has put in place have helped make the school one of the few California public schools that both serves a low-income community and has almost closed the achievement gap for its students with disabilities. More than 90% of KIPP Raíces’ 565 students come from low-income and Latino families, and the vast majority outperform their peers in Los Angeles Unified School District (LAUSD). But most notably, the 10% of KIPP Raíces students with special learning needs do so as well: 36% score proficient in ELA and 50% in math, compared with less than 8% in LAUSD. This means that students with disabilities at KIPP Raíces are more than four times as likely to be proficient in ELA and eight times as likely to be proficient in math as the students with disabilities elsewhere in the district.

KIPP Raíces serves predominantly low-income and Latino Students

Student demographics, 2016-2017



Source: California Department of Education, Enrollment Files 2016-17



"It's a really loving place, but it is also coupled with high expectations and a focus on results," founder Amber Young Medina told the L.A. School Report when KIPP Raíces became the first KIPP school to earn a National Blue Ribbon in 2015. KIPP Raíces educators know that every single child is capable of incredible things, and they work hard together to make that a reality.

KIPP Raíces is part of the KIPP LA network of 15 charter schools. Yesenia Castro (principal at Raíces), Kim Dammann (KIPP LA Managing Director of Special Education), and Medalla Dimapindan (lead resource specialist at Raíces) share their thoughts about how the school does it.

A strong culture of collaboration

Like so many school leaders who achieve great results for students with disabilities, Castro approaches her staff and students with a spirit of inclusion and collaboration. "Our special education students are not seen as a separate category or group; they're all our kids, there's a shared ownership," said Castro. Each classroom works closely with others in its grade level, and even across grade levels TK-4.

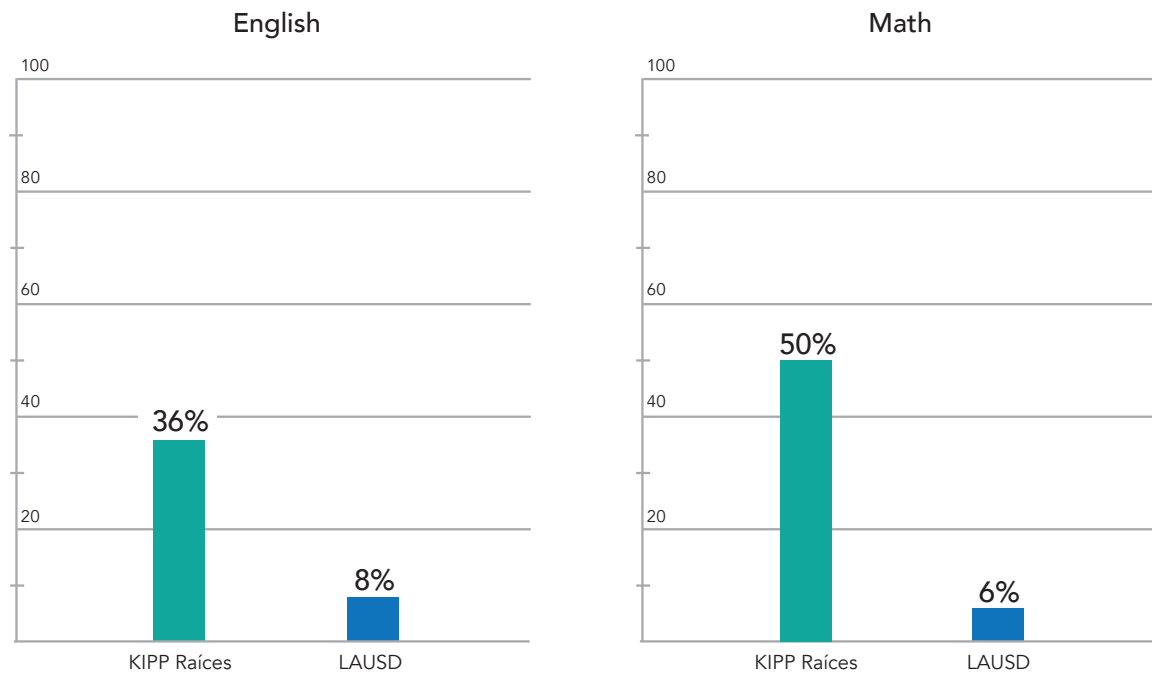
Even more than other children, students with disabilities need stability and consistency. They thrive when they develop ongoing, authentic relationships with caring adults who know and understand them, and who have the knowledge to try different interventions in search of the right solutions -- as well as the patience to keep trying when those interventions don't work.

Many on the KIPP Raíces and local KIPP LA special education teams have worked in special education for a long time, and most have worked together at KIPP for years. The school has seven full-time and one part-time staff member supporting special education, and the KIPP LA central office has several program managers, as well as a director of special education, Kim Dammann, who has worked in many special education environments and schools for more than 20 years. Since the school was founded in 2008, the special education team has expanded, either by bringing in specialists from other schools, or by promoting teachers or specialists to new levels. The principal has also been around since 2009 -- she was a founding first grade teacher -- and each year more than 90% of teachers return to the school.

To keep those relationships strong, KIPP LA strives to provide as many services as possible in-house, rather than contracting services out to an external provider. "This way we can actually control the quality of our services," said Dammann. "It takes someone who works within the team on an ongoing basis to really meet kids' needs. It's getting to know the teachers and students and understanding the culture, and going above and beyond to help them with whatever they need."

KIPP Raíces outperforms Los Angeles Unified for students with disabilities

Percent proficient in English and math, 2016-17



Source: California Department of Education, California Assessment of Student Performance and Progress (CAASPP), 2016-17

With so many years working together, the special education team is able to communicate openly and frequently about what's working and what's not working, extending that open communication to parents, general education teachers, and regional staff.

"There's just constant communication about what's being done with the students and seeing where they're at," said Castro. Teachers also meet every week for three hours with their grade level and receive tailored professional development on relevant topics, often including behavior management and special education interventions, from special education staff. To help teachers stay focused on instruction, Dimapindan handles all IEP paperwork and meets with every general education teacher every six weeks, rotating through grade levels each week.

Effective instruction is differentiated, not diluted

When schools "water down" content and instruction to ensure that students with disabilities can master them, this does students a significant disservice. When these students don't receive challenging material in one grade, it sets them up to be unprepared for challenging material in the following grade, and eventually in college, career, or life.

Like other schools that achieve great results for students with special needs, KIPP Raíces provides every student with a rigorous curriculum -- but gives students many chances to learn material, with a range of instructional approaches. "Students whose needs have not been met through traditional teaching methods benefit from supplemental, direct instruction, small group work, workshops, call and response, hands-on learning, chanting, role-playing, team-teaching, individualized instruction, cooperative learning, peer tutoring, computer activities, and other innovative techniques," said the school's 2013 charter renewal petition.

This year, the administration has reserved an additional hour of common planning time in the weekly schedule. During this time, grade-level teams meet to plan instruction, look at data, and discuss student progress. Assistant principals also provide classroom coverage throughout the week to allow teachers to leave their classroom and observe other teachers' techniques.

"Differentiation" based on student needs comes so naturally to the school's teachers that it's easy for them to extend it to students with disabilities. "When we look at all our kids -- English Language Learners, special education, general education -- it's more of 'what systems will work for that child in particular?' and that's what we do," one of the school's general education teachers told the California Charter Schools Association for its 2016 report on effective approaches to special education. "Every teacher adjusts their teaching style to meet the needs of the children in the classroom."

Staying on top of student challenges

At the most effective schools for students with disabilities, educators use the school-wide systems and tools to communicate with each other about student needs. They use the same data-tracking tools and assessments to document the patterns and trends of each student, not just those with disabilities. The most successful schools use multiple data points to track progress all year long and adjust instruction. At KIPP Raíces, regardless of whether a student has an IEP, the school has a structure called "Student Support Team" (SST) designed to ensure students get the help they need. Grade-level managers review data regularly and flag those students who seem to be struggling either academically or behaviorally, so that an SST -- made up of administrators, teachers, and parents, and the special education lead (if the student has an IEP) can be created. That team meets to determine the best next steps, then monitors progress together in an SST meeting every few weeks until things improve.

Unlike at some other schools, SST meetings at KIPP Raíces aren't rooted in teachers' mere observations or guesses, nor do they only consider annual test scores. SST meetings are anchored in real (and real-time) data about what students are learning and not learning. Before an SST meeting happens, teachers complete a form with the student's areas of strength and challenge, as well as the interventions they've tried. The form also includes data such as results of the Measures of Academic Progress assessment of students' growth in learning, data from "running records" that teachers use to measure reading levels, writing samples, "exit tickets" that gauge student understanding of a lesson or unit, and any other information that helps illustrate the challenge and lack of progress.

These same types of data are then gathered by teachers every three to six weeks for follow-up SST meetings. If the student isn't improving after three or more SST meetings, students may be referred for a special education evaluation.

"We're constantly looking at data," said Castro. Parents are rarely surprised by student needs, because they are steeped in their own student's data all year long.

The school provides parents with information about types of student data at "back to school night" in the beginning of the year, and then regularly sends home information about how each student is doing relative to grade-level standards.

To involve teachers more deeply and get ahead of problems, last year the principal began to send out a monthly survey to teachers, asking which few students needed help and what interventions they had already tried. Teachers also review the past year's SSTs at the beginning of the new school year, so they can build upon what's worked and avoid interventions that haven't. The SST embodies the school's proactive approach to ensuring students are on track. In a typical year, the school conducts close to 200 SSTs (some for the same student) across a student body of about 550 students.

Tiered interventions help schools adjust support over time

Although many students nationally are identified as having a learning disability and kept trapped in that diagnosis for years, research shows that this is a mistake. Like all students, individuals with disabilities grow and change over time, with their needs for services shifting or sometimes going away entirely. As such, many schools and districts, including KIPP Raíces, have adopted a "tiered instruction" approach, which provides three different levels – or "tiers" – of instructional strategies, depending on a student's individual needs. As students struggle or progress, they receive more or less intense interventions as a result.

The goal is to provide such effective support early on that students can eventually support themselves. "The goal is really to have these kids become independent," said Dimapindan. At KIPP Raíces, students learn strategies for how to manage in spite of their disabilities. Over time, they can then choose to "exit" special education services if these students feel they no longer need it.



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Innovate
Public Schools

ABOUT INNOVATE PUBLIC SCHOOLS

Innovate Public Schools is a nonprofit organization whose mission is to build the parent and community demand for world-class public schools, and to accelerate the growth of these schools, particularly for low-income students and students of color.

We publish easy-to-understand school quality data and research that highlights both problems and solutions, and we build the capacity of parents, community leaders and educators to innovate and act together to create world-class public schools.



Catalyst: Bremerton

Section 5: Attachment 5

Contents:

- Student Exit Standards

Attachment 5: Student Exit Standards

A part of the mission of Catalyst Public Schools is to support scholars to live full lives and to succeed in college, career, and life. Because of this, we commit to hold a high bar as we support students to meet rigorous academic standards that will set them up for success in high school and beyond.

By the time Catalyst scholars graduate from 8th grade, all of our scholars will have cultivated the knowledge, skills, and habits of mind needed to participate in a rigorous college and career course of study. The following chart outlines our exit standards at both 4th and 8th grades, the capstone grade levels for elementary school and middle school, respectively, at Catalyst. Catalyst Exit Standards are derived from relevant state and national standards as well as from the resources referenced below.

In addition to exit standards, Catalyst will develop power standards for each grade level and content area. We will use these documents to ensure that each of our staff has a deep understanding of what proficiency looks like at each grade level so that we can ensure our mastery-based approach to grading is equitable and consistent. Scholars and families will also be involved so that they can have clarity around what it looks like to be at or above grade level as scholars progress through the grades. We will leverage resources such as the Student Achievement Partners' [Focus](#) and [Coherence Maps](#), the [Great Schools! Milestones](#) resources, and frameworks for mastery-based grading to ensure that families and scholars understand what grade level success and work looks like. These resources have also added to the creation of our exit standards, below.

Note that the exit standards below will apply to the vast majority of Catalyst scholars, as we know that most scholars are capable of meeting these high expectations, when dynamic supports are in place. For scholars with significant disabilities or other circumstances that impact learning, Catalyst will convene a team to determine any necessary modifications to exit standards. These modifications will only be done when a scholar's Individualized Educational Plan (IEP) or other documents require a change, or when a team of stakeholders, including parents and scholars, convene and determine that modifications are appropriate.

Exit Standard	Catalyst Assessments— Grade 4	Catalyst Assessments— Grade 8	State Standards	State Assessment
Scholars will fluently read, comprehend, and analyze grade level literature and non-fiction texts.	STEP Assessment, Level 18 End of course gateway assessment with performance task	Proficiency on close reading and textual analysis rubric	Washington K-12 Learning Standards for ELA	Smarter Balanced Assessment (SBA) (grades 3-8)

Exit Standard	Catalyst Assessments— Grade 4	Catalyst Assessments— Grade 8	State Standards	State Assessment
Scholars will be proficient and powerful writers across a variety of genres. Scholars will be proficient in communicating ideas and content, organization, word choice, voice, fluency, and conventions.	Proficiency on 6-Trait Writing Rubric for grade 4	Proficiency on 6-Trait Writing Rubric for grade 8	Washington K-12 Learning Standards for ELA	SBA (grades 3-8)
Scholars will proficiently demonstrate strong understanding of relevant mathematical concepts conceptually and procedurally and will be able to apply mathematical knowledge to solve real-world problems.	End of course gateway assessment for grade 4 with performance task	End of course gateway assessment for grade 8 with performance task	Washington K-12 Learning Standards for Math	SBA (grades 3-8)
Scholars will proficiently demonstrate mastery on core history content standards and skills.	Proficiency on relevant portions of Catalyst Change-Makerspace/ Passion Project Rubrics	Proficiency on relevant portions of Catalyst Change-Makerspace/ Passion Project Rubrics	Washington K-12 Learning Standards for Social Studies	N/A
Scholars will be proficient at relevant science process skills, including skills of scientific inquiry and relevant science standards.	End of course gateway assessment for grade 4 with performance task	End of course gateway assessment for grade 8 with performance task	Washington K-12 Learning Standards for Science	Washington Comprehensive Assessment of Science (grade 8)

Exit Standard	Catalyst Assessments— Grade 4	Catalyst Assessments— Grade 8	State Standards	State Assessment
Scholars will demonstrate mastery of cross-curricular standards by completing an inter-disciplinary Passion Project	Proficiency on relevant portions of Catalyst Change-Makerspace/ Passion Project Rubrics	Proficiency on relevant portions of Catalyst Change-Makerspace/ Passion Project Rubrics	Teaching Tolerance Social Justice Standards	N/A
Scholars will complete a College and Career Passion Portfolio.	Proficiency on relevant portions of Catalyst Change-Makerspace/ Passion Project Rubrics	Proficiency on relevant portions of Catalyst Change-Makerspace/ Passion Project Rubrics	Teaching Tolerance Social Justice Standards	N/A



Catalyst: Bremerton

Section 7: Attachment 6

Contents:

- Year 1 of Operations School Calendar
- Daily and Weekly Schedule
- Narrative

Catalyst: Bremerton 2020-2021 School Calendar														Important Dates		Instructional Days per Month										
July							August							September							July 20: Launch (summer PD for staff) begins		August	8		
Su	M	Tu	W	Th	F	Sa	Su	M	Tu	W	Th	F	Sa	Su	M	Tu	W	Th	F	Sa	August 11-13: Family Orientation Nights		September	20		
			1	2	3	4							1			1	2	3	4	5	August 17-18: Intake Conferences and Dream Team Meetings		October	21		
5	6	7	8	9	10	11	2	3	4	5	6	7	8	6	7	8	9	10	11	12	August 19: First Day of School (all grades)		November	17		
12	13	14	15	16	17	18	9	10	11	12	13	14	15	13	14	15	16	17	18	19	September 7: Labor Day (no school)		December	13		
19	20	21	22	23	24	25	16	17	18	19	20	21	22	20	21	22	23	24	25	26	September 23: No School, Look Back/Step Forward (staff PD day)		January	19		
26	27	28	29	30	31		23	24	25	26	27	28	29	27	28	29	30				September 30: Change Maker Space Exhibition Night		February	18		
							30	31													October 12: Indigenous People's Day (no school)--Day of Service		March	22		
October							November							December							November 4: No School, Look Back/Step Forward (staff PD day)		April	15		
Su	M	Tu	W	Th	F	Sa	Su	M	Tu	W	Th	F	Sa	Su	M	Tu	W	Th	F	Sa	November 11: Veteran's Day		May	19		
				1	2	3	1	2	3	4	5	6	7			1	2	3	4	5	November 26-27: Thanksgiving Break		June	13		
4	5	6	7	8	9	10	8	9	10	11	12	13	14	6	7	8	9	10	11	12	December 14: Change Maker Space Exhibition Night		December 16: No School, Look Back/Step Forward (staff PD day)		Total	185
11	12	13	14	15	16	17	15	16	17	18	19	20	21	13	14	15	16	17	18	19	December 21-January 1: Winter Break					
18	19	20	21	22	23	24	22	23	24	25	26	27	28	20	21	22	23	24	25	26	January 4: School Resumes					
25	26	27	28	29	30	31	29	30						27	28	29	30				January 18: Dr. Martin Luther King, Jr. Day					
																					February 10: No School, Look Back/Step Forward (staff PD day)					
																					February 15: President's Day					
January							February							March							March 24: No School, Look Back/Step Forward (staff PD day)					
Su	M	Tu	W	Th	F	Sa	Su	M	Tu	W	Th	F	Sa	Su	M	Tu	W	Th	F	Sa	March 31: Change Maker Space Exhibition Night					
					1	2		1	2	3	4	5	6		1	2	3	4	5	6	April 1-2: Student-Led Confernces and Dream Team Meetings					
3	4	5	6	7	8	9	7	8	9	10	11	12	13	7	8	9	10	11	12	13	April 5-9: Spring Break					
10	11	12	13	14	15	16	14	15	16	17	18	19	20	14	15	16	17	18	19	20	May 12: No School, Look Back/Step Forward (staff PD day)					
17	18	19	20	21	22	23	21	22	23	24	25	26	27	21	22	23	24	25	26	27	May 31: Memorial Day					
24	25	26	27	28	29	30	28							28	29	30	31				June 16: Change Maker Space Exhibition Night					
31																					June 17: Last Day of School					
																					June 18 and 21: Make Up Weather Days, if needed					
April							May							June							*Note: Wednesdays are minimum days. Dismissal at 12:45					
Su	M	Tu	W	Th	F	Sa	Su	M	Tu	W	Th	F	Sa	Su	M	Tu	W	Th	F	Sa	Additional Important Dates for Assessments (dates are tentative):					
				1	2	3							1			1	2	3	4	5	January-March ELPA 21 Testing					
4	5	6	7	8	9	10	2	3	4	5	6	7	8	6	7	8	9	10	3	12	March-June SBA Testing (Grades 5-6)--ELA and Math					
11	12	13	14	15	16	17	9	10	11	12	13	14	15	13	14	15	16	17	18	19	April-June SBA Testing (Grade 5)--Science					
18	19	20	21	22	23	24	16	17	18	19	20	21	22	20	21	22	23	24	25	26	October-April WA-AIM (Grades 5 and 6)--Science, ELA, and Math					
25	26	27	28	29	30	31	23	24	25	26	27	28	29	27	28	29	30				WA Kids Gold Testing September-October					
							30	31																		

Catalyst: Bremerton Daily Schedule and Weekly Schedule 4 days/week			Catalyst: Bremerton Daily and Weekly Schedule--Early Release 1 day/week		
Time	Learning Experiences		Time	Learning Experiences	
8:00-8:30	Breakfast, Arrival, Targeted Learning Time (optional)		8:00-8:30	Breakfast, Arrival, Targeted Learning Time (optional)	
8:30-9:00	Sunrise (morning huddles and affinity groups)		8:30-9:15	Community Circle	
9:00-10:30	Deeper Learning Block: Humanities		9:15-10:15	Wellness + Leadership	
10:30-10:45	Break/Recess		10:15-10:30	Break	
10:45-12:15	Deeper Learning Block: Mathematics		10:30-12:00	Enrichment + Support Club	
12:15-1:00	Lunch and Recess		12:00-12:30	Lunch and Recess	
1:00-2:00	Change-Maker Space		12:30-12:45	Dismissal	
2:00-3:00	Wellness + Purpose Block				
3:00-3:45	Focus Period + Targeted Learning Time				
3:45-4:00	Sunset (afternoon huddle)				
Instructional Hours	6.75			4.25	

	Days/Year	Instructional Minutes	Instructional Hours		Instructional Days per Month		Early Release Per Month	Full Day Per Month
Full days (4x/week)	151	405	6.75		August	8	2	6
Early Release (1x/week)	34	255	4.25		September	20	4	16
					October	21	4	17
Total Instructional Hours	1163.75				November	17	2	15
Total Instructional Minutes	660				December	13	2	11
					January	19	4	15
					February	18	3	15
					March	22	4	18
					April	15	3	12
					May	19	3	16
					June	13	3	10
					Total	185	34	151

Guide to Daily and Weekly Calendar

- Summer Staff Orientation: All school staff will participate in yearly summer professional development. In our first year this will take place from 7/20 through 8/14, allowing 4 full weeks of professional development for our founding staff.
- Family Orientation Nights. Prior to the launch of school, families and scholars will be welcomed via family orientation. Families may choose 1 of 3 nights to attend, so that we can accommodate the schedules of all families. During orientation night families and scholars will meet teachers and we will review the school's contract for excellence as well as the school's mission, vision, and values.
- Intake conferences and Dream Team Meetings. Prior to the launch of school families and dream team members (faith leaders, relatives, friends of families, etc.) will convene with the school staff and the scholar to build relationships and begin goal setting for the year.
- Catalyst Kickstart. The first week of school will serve as an orientation for scholars. During this time students will learn about the mission, vision, and values of Catalyst and will participate in elements of our academic and social-emotional programs. Scholars will also participate in a variety of baseline assessments and participate in a joyful orientation to internalize school routines and procedures.
- Early Release Wednesdays. Wednesdays are early release days. On these days scholars participate in a variety of learning activities to foster their wholistic wellness and social-emotional health. Scholars participate in a school-wide community circle, an extended Wellness+Leadership block, and participate in arts and athletics based enrichment classes. Students who are in need of behavioral or social emotional support receive this via a weekly support club held at the same time.
- Teacher PD and Data Days. Six times throughout the year teachers participate in professional development and data days. Days that are chosen align with the interim assessment schedule used at the school. During these days teachers participate in a variety of professional development activities and have a structured data day to analyze interim assessment data and create action plans.
- Student Led Conferences and Dream Team Meetings. A second round of conferences and dream team meetings ensure that families and other stakeholders are apprised of student progress before the year concludes.

Guide to Daily and Weekly Schedule

- Targeted Learning Time (TLT). TLT provides students with small group academic supports that they need to thrive. During TLT a student can meet with a teacher or a small group instructor to receive data-driven and differentiated support to meet their needs. This is also a time when push-in and pull-out supports can be provided to students with disabilities and/or English Language Learners. TLT in the morning will be available for any students who arrive to the school before 8:30. TLT in the afternoon is available to all students.
- Sunrise and Sunset. Sunrise and Sunset times serve as the opening and closing of each day.
 - **Sunrise Huddle:** opening huddle portion of each day in which scholars goal set, share and build community. Sunrise Huddle happens each morning in different configurations to meet different needs:
 - **Classroom Huddle:** (2 times/week): Scholars meet with their class, goal set, build plans for success, and build community

- **Affinity Huddle:** (1 time/week): Scholars meet across grade levels in affinity groups by race, gender, interest, or birth order, to investigate and build alliances across grades
 - **Mentor Huddle:** (1 time/week): Older scholars meet with younger scholars as mentors to go through weekly/daily goals, give advice on how to meet goals, and to be sounding boards and solution generators for younger scholars. Older scholars teach content they are learning and mastering to their younger counterparts to build confidence in their content mastery. Older and younger scholars work together to solve problems and dilemmas, learning that everyone has something to contribute and important voice.
 - **Schoolwide Huddle:** (1 time/week): The whole school comes together to build community, celebrate and practice leadership.
 - **Sunset Huddle:** (5 times/week): Each scholar meets with his/her classroom huddle to review goals and to reflect on successes and opportunities for continued growth.
- **Deeper Learning Blocks.** Allows scholars the time required to learn, practice, and deeply master content and includes whole group mini-lesson, guided time in the scholar's zone of proximal development with a teacher, additional support from a small group instructor, independent practice time, collaborative practice time, and just-right practice using technological supports such as ALEKS (math) or NewsELA (ELA).
 - In the elementary grades, scholars will receive much of their instruction via small group academic rotations. In a given classroom the lead teacher may present a whole group mini-lesson related to a standard and then students will split into 3-4 small groups. One group will receive support from the lead teacher while another group of students receives support from the small group instructor. One independent group of students will practice recently learned standards via online programs while the 4th group either participates in a collaborative learning activity or has additional work and practice time.
 - In the middle school, academic rotations will continue, but the class will be student-led. Students will work in groups of 4, known as "crews" with one student being the crew captain. The teacher will introduce new content to the class and students will work through, practice, and demonstrate proficiency of content by working individually and collaboratively.
- **Change-Maker Space.** Every year, Catalyst scholars collaboratively identify a challenge in their community that they want to solve. In peer groups, scholars research the issue, the impact it has on the community, and conduct empathy interviews. The research inspires ideation and solution which scholars then present to the primary stakeholders and authentic audience.
- **Wellness + Purpose Block.** Students participate in daily specials courses, taught by small group instructors and/or teachers in training. Topics focus on either wellness, the arts or athletics and are chosen based on the interests of students and the skillsets of teachers.
- **Focus Period.** An academic support block held 4 days a week. During this time interventions are provided for students as well as academic and behavioral supports. It is also a time for students to complete independent work and/or jump-start their homework.
- **Wellness + Leadership.** In the elementary grades, students will participate in SEL courses where they explore elements of their identity and cultivate the habits of mind needed to be independent and collaborative learners with a focus on cultivating critical hope and optimism. By middle school, this course morphs into a course where students will learn leadership skills and apply these skills as they develop solutions to community issues about which they are passionate. The curricula in these courses will be aligned with that of our change-maker space courses and students' yearly passion projects.

- Enrichment. Teachers and community members have passions to share with scholars. Weekly, scholars will meet with teachers or community members to deeply immerse in a passion of his/her choice. Every student will participate in 4 enrichments over the course of the year, on topics such as arts, physical and mental wellness, cooking, gardening, etc. This time will also be when students can form clubs of interest and/or participate in athletic activities beyond what is offered in the school's physical education and wellness class.
- Support Club. A weekly block, held on early release days where students who are in need of behavioral and/or social-emotional supports have structured time in a smaller setting to work with appropriate school staff. This is also a time when support groups for different needs will be set up for scholar's benefit.



Catalyst: Bremerton

Section 11: Attachment 7

Contents:

- Enrollment Policy

Attachment 7: Student Recruitment and Enrollment Policy

Catalyst will be culturally inclusive and serve a diverse population in terms of race, ethnicity, national origin, gender, economic status, religion, home language, learning or physical disability, sexual orientation, or level of academic preparation.

Catalyst is open to all students at the appropriate age groups and grade levels who wish to attend without regard for the location of residence of students in Washington. There shall be no admission testing or other evaluation required of any applicant. Catalyst shall not charge tuition. If capacity is insufficient to enroll all students who apply to Catalyst, admission, except for existing students, shall be determined by a random, public lottery in accordance with any authorizer-approved enrollment preferences and the Open Public Meetings Act. Catalyst's enrollment policy and process is modeled, with permission, after the enrollment policies of Willow Public School and Ashé Preparatory Academy.

Catalyst will include, as part of its enrollment policy, a final timeline for application and enrollment periods. The table below contains tentative dates for enrolling Catalyst's founding class of scholars. This timeline provides families with ample time to decide and submit required enrollment paperwork, and the school, to ensure strong data collection systems are in place to warehouse and organize student enrollment data securely and efficiently.

a. Application and Enrollment Period

Action	Timeline/Deadline
Application Period	October 1, 2019 - February 5, 2020
Admissions Lottery (<i>if needed</i>)	Saturday, February 8, 2020
Notify Admitted Students	Monday, February 10, 2020
Intent to Enroll Forms Due	Monday, February 17, 2020
Waitlist Students Notified (<i>if applicable</i>)	Tuesday, February 18, 2020
Enrollment Packets Due	Saturday, February 29, 2020

Application and Enrollment Process

In the interest of reaching our target students, families, and communities, and minimizing any potential barriers to entry, the application process to Catalyst is designed to be as simple and accessible as possible. The application itself requires only information that is absolutely necessary, and it is available in languages predominantly spoken in Bremerton and the surrounding region. Catalyst staff is available and actively seek to assist any students or families in the application process.

Application and Enrollment Timeline

1. **October 1** – Applications for admission to Catalyst will be made available via the school website, mailings to current parents and community members, and through various community outreach efforts.
2. **February 5** – Final deadline for submission of applications from new applicants. Any applications received after this date and time will be placed at the end of the lottery-generated waitlist. All applications received in person will receive a confirmation receipt. Families are welcome to mail their application, complete it online, or submit it in person at the school's office. An acknowledgement letter will be sent upon receipt of the mail or online application. If a family does not receive or keep this receipt the school is not responsible for claims that an application was sent by mail but not received by the deadline. All receipts will be closely tracked but in the unlikely event that the record is lost, the school cannot take responsibility should an application be unaccounted for and the family does not have their record.
3. **February 8** – If applications exceed the number of available seats, a random lottery for each grade level will take place. The lottery will be conducted pursuant to Washington state's charter school law (RCW 28A.710.050) and the admissions policy, once approved by the authorizer. The lottery will be open to the public and attended by a representative of the Catalyst Board of Directors and a neutral auditor. After all seats have been filled for each grade level, a lottery-generated waiting list will be created for each grade level, placing students in the order which their ticket was drawn. The waitlist will be valid for one year.
4. **On-going** – If capacity is not reached by the application deadline, students will be enrolled to the school on a rolling basis. If and when the number of students surpasses the number of seats, students who submit applications after capacity is reached will be added to a waitlist, in the order that the school received their application.
5. **February 10** – After the lottery is complete, all parents will be notified of the results of the lottery within 48 hours. Parents of accepted children will receive an **Intent to Enroll form**, which can either be picked up at the school or mailed to the parent with a return envelope and postage included. School staff will be available to assist families with the completion of Intent to Enroll forms as necessary. Completion of the Intent to Enroll form guarantees the student a spot in the school; once a family submits an Intent to Enroll form, they will receive an **Enrollment Packet**. Students who have been placed on the waiting list will also be notified of such placement within 48 hours of the lottery.
6. **February 17** – Completed Intent to Enroll forms must be returned to the school. If mailed, the Intent to Enroll form must be postmarked by this date.
7. **February 10-17** – Before the due date for the Intent to Enroll forms, Catalyst will attempt to verify personally with each parent by phone or at home if they intend to accept a seat at the school and if yes, encourage them to submit their Intent to Enroll form. If the school is unsuccessful in contacting the family for verification or is not in receipt of an Intent to Enroll form, the family will then give up the seat and the student's name will be placed at the end of the lottery-generated waitlist.
8. **February 18** – If there are still seats available after the Intent to Enroll deadline, the school will begin accepting students on the waitlist. After all seats have been assigned, the lottery-generated waitlist will be utilized for remaining seats. In all cases, Catalyst will adhere to all schedules and requirements pursuant to Washington State law concerning the recruitment and enrollment of students.
9. **February 29** – Enrollment packets are due for lottery-selected students. If students are enrolled on a rolling basis, enrollment packet deadlines will be set accordingly to give families ample

time to gather the necessary documentation. Late paperwork for admission and enrollment shall result in loss of opportunity for enrollment preferences as listed below, and may result in loss of opportunity for admission, but will be reserved in the case that the waitlist is completely exhausted in each year. Catalyst will provide extensive support to families, including holding office hours, home visits, and Family Enrollment Events, to ensure all paperwork is received on time.

10. **On-going** – The McKinney-Vento Homeless Assistance Act for Homeless Children and Youth entitles all homeless school-aged children to the same free and appropriate public education that is provided to non-homeless students. If there is an available seat, Catalyst will immediately enroll any homeless student, and will not delay or prevent the enrollment of a homeless student due to the lack of school or immunization records. If enrollment is at capacity, the student will be placed at the top of the waitlist and admitted as soon as a seat opens.

b. Student Recruitment Plan for Admission to the 2020-2021 School Year

Catalyst seeks to recruit most heavily from West Bremerton neighborhoods, which include our target populations of systemically underserved students: students of color, students from low-income families, and students learning English. In addition, Catalyst seeks to recruit heavily from the African-American, biracial, multiracial and Latinx communities from across Bremerton and Kitsap County. We will also be actively recruiting military families and their children.

The information sessions, home visits, and the application packet for admission to Catalyst shall include information that allows students and parents to be informed about Catalyst's operation as a charter school, its educational program, the academic and behavioral expectations of students, and the rights and responsibilities of students and parents who wish to join the Catalyst community.

Community Communication and Notification (July 2019 – September 2020)

All communication from Catalyst will be in English and Spanish, whenever possible. Other languages will be added, as needed. The following will also be implemented:

1. Catalyst will place paid advertisements in local print media. The ads will announce that the school is public and tuition-free, accepting applications, contact information and dates, and times/locations for recruitment events.
2. Catalyst will seek to include recruitment events and application deadlines on community calendars (print and electronic when available).
3. If the addresses are available for students enrolled in target areas schools and preschools, Catalyst will mail postcards to each residence. The postcards will announce that Catalyst is accepting applications, contact information and dates, and times/locations for recruitment events.
4. Catalyst will have a table set up at all major community events, fairs, farmers markets, celebrations, and parades to spread the word about Catalyst.
5. Catalyst will be present in apartment buildings/complexes and in affordable housing communities, such as:
 - Bay Vista Housing Development
 - Knollwood Housing Development
 - Shadow Creek Apartments
 - Tamarack Apartments
 - Tara Heights

- Winfield Apartments
 - Wright Court
6. Catalyst will work with the faith-based community to present to congregations.
 7. Catalyst will run a digital media marketing campaign with quick access to the Catalyst charter application and maintain a website that includes detailed information and updates on the school, recruitment, application process, and deadlines.
 8. Catalyst will post flyers announcing recruitment events at various public facilities frequented by school-aged students and families, and set up tables at the entrances to share more information at the following locations:
 - Marvin Williams Community Center
 - Coffee Oasis locations
 - Kitsap Immigration Assistance Center
 - Local restaurants and other community services
 - Organizations that serve Catalyst's target populations (recreation centers, libraries, athletic venues, and schools)
 - If allowed, Catalyst will place announcements in the parent newsletters or other communications at preschools and elementary schools that will feed into Catalyst. The announcements will state that the school is accepting applications, contact information and dates, and times/locations for recruitment events.

Recruitment Events

Catalyst will host at least six recruitment open houses during the school year before school opens. See the following schedule and location of the events in preparation for the 2020 opening. Any events that take place after a facility for the school has been secured will be held at the school.

Each open house will include a presentation that provides a detailed description of Catalyst and its educational model. Participants will have an opportunity to provide feedback on defined aspects of the Catalyst program and ask questions in a large group setting or on a more individual basis. Participants will also have an opportunity to share ideas and ask questions through non-verbal means, to ensure all voices are given space to contribute. Participants will be given an application for admission and extensive written explanation of the school and its programs. The entire event and all written materials will be translated into Spanish and other languages as needed.

Beginning in November of 2019 and concluding in April, Catalyst will host a weekly small group question-and-answer session for the parents of prospective students. The session will be facilitated by a representative from the school. During the session, participants will be given the written materials and application provided at the open house. In subsequent years, they will have an opportunity to observe our classes in session and ask individual questions.

Catalyst will request to be one of the schools included in any annual preschool fairs in early childhood programs serving Bremerton families.

Catalyst will request the opportunity to present or be a part of any other elementary information opportunities or events hosted by the target schools or districts.

Conditions of Enrollment

Catalyst shall have the following requirements that must be met by each student and their family before enrollment is complete:

1. Complete enrollment/registration forms including student data sheet, emergency information cards, and other required documents.
2. Provide records documenting immunizations required by public schools.
3. Admission tests will not be required; however, assessments will be administered following enrollment to determine personalized learning plans. These tests will serve as diagnostics of students' reading, writing, and math skills. Catalyst will use a student information system to process enrollment as the student body grows.

c. Lottery Procedures

The lottery will, generally, follow the order below:

1. Current students are automatically re-enrolled to the next grade.
2. If spaces are available, and once an application is completed and duly submitted, siblings of currently enrolled students will be automatically enrolled. If a grade has more sibling applicants than openings, sibling applicants will be drawn at random.
3. New applicants are drawn completely for each grade, beginning with the lowest entry grade, until all applicants are placed in a grade or the waiting list. As applicants are drawn and enrolled, siblings will also be immediately enrolled.
4. After all spaces are filled, the drawing continues to determine the order of the waiting list.

Lottery rules, deadlines, dates, and times for the lottery will be communicated in the admission applications and on Catalyst's website. Public notice for the date and time of any lottery will be posted once the application deadline has passed. Catalyst will inform parents of all applicants and all interested parties of the rules to be followed during the lottery process, location, date, and time via mail or email at least two weeks prior to the lottery date.

d. Weighted Enrollment Preference

Catalyst will grant an enrollment preference to siblings of currently enrolled students, with any remaining enrollments allocated through a lottery per RCW 28A.710.050(3). Before Catalyst conducts the lottery, the school will work with the Commission to legally grant a weighted enrollment preference to children of full-time employees of Catalyst, as well as to at-risk students, to ensure that Catalyst is serving students in its target populations and adhering to lottery terms pursuant to the Charter School Program Grant.

e. Waiting Lists, Withdrawals, Reenrollment, and Transfers

Waiting Lists

Using the lottery and waitlist process outlined above, Catalyst will notify families of available spots in a timely, systematic way. Students will be taken off the waitlist in the order they are placed. This waitlist will allow students the option of enrollment in the case of an opening during the current school year. In no circumstance will a waitlist carry over to the following school year.

Re-Enrollments

Scholars are assumed to be returning to the school each fall unless the school is informed otherwise. Re-enrollment of currently enrolled scholars is automatic, and the school will issue Intent to Renew Enrollment forms to confirm scholar status. Re-enrollment of previously enrolled Catalyst scholar that have unenrolled will be dependent upon capacity. The scholar may be placed on the waitlist.

Withdrawals

To withdraw a scholar, the parent/guardian informs the school in writing that the scholar is transferring and indicates the school to which s/he is transferring. Catalyst is a school of choice and it is critical that all scholars and their parents review the school closely before deciding to enroll. We realize there may be circumstances in which a parent or guardian wishes to transfer their child to a different school. In these instances, Catalyst personnel will offer to meet with the family to discuss the reasons for the desired withdrawal from the school and seek solutions to any problems within the school community. If the parent or guardian still wishes to transfer their child to another school, staff at Catalyst will make every reasonable effort to help the student find a school that better serves the family's desires. Catalyst will ensure the timely transfer of any necessary school records to the student's new school.

Transfers

Students who wish to transfer to Catalyst will be placed on the waiting list and notified when an opening exists. Students that enter mid-year will be supported with acculturation (see **Section 8**).



Catalyst: Bremerton

Section 12: Attachment 8

Contents:

- Student Discipline Policy

Catalyst School Discipline Policy

Our mission is to ensure that our scholars cultivate the critical hope, optimism, and leadership essential to be catalysts in their community and world. This can only be achieved if all of our scholars are engaged in their education each and every day. Because of this, our core value of equity guides us as we develop an inclusive and culturally responsive approach to school discipline.

Catalyst utilizes a discipline policy that puts students and their needs at the center. Pillars of our discipline policy include:

- Clear and consistent behavioral expectations that are developmentally appropriate and documented via our Code of Conduct;
- Clear expectations of the student, school, and family documented via the Catalyst Contract for Excellence;
- A positive, tiered, school-wide approach to behavior management;
- Restorative practices;
- Trauma-informed practices; and
- Practices and structures to foster social-emotional learning and growth as well as the cultivation of critical hope and optimism.

a. Building a Foundation of Hope, Optimism, and Accountability

Catalyst utilizes a school-wide, positive behavioral system and discipline policy to support students to meet high behavioral expectations. Key components of our discipline plan include:

Catalyst Contract for Excellence

To ensure the success of our scholars, we begin our work early, and in partnership with scholars and their families, so that the culture and expectations of the school are clearly understood. As such, the Catalyst Contract for Excellence is a document that the school uses to onboard families into the school culture and to make sure that everyone is aligned around what high expectations look like within our school. The Contract for Excellence is a document that is reviewed with families annually during family orientation nights and during mid-year orientations with students that may enroll later in the school year. New students to the school receive home visits during which the Contract for Excellence is reviewed and discussed. A copy of the Catalyst Contract for Excellence is included at the end of this attachment.

Building a Culture of High Expectations and Joy

At Catalyst, we believe that scholars are most successful when clear boundaries are set and consistently maintained throughout the school day. We also believe that this can only be accomplished when school staff maintain a sense of humor, joy, and optimism as they consistently and equitably hold students to the highest of expectations. At Catalyst, the rules of school are the rules of life, thus the values that we instill in scholars are practiced in the classroom, school, and community. Expectations for scholars are set when it is clear that meeting them will lead them on a path to building a successful future.

We also recognize that our scholars will only be successful in meeting high behavioral expectations when teachers build deep and trusting relationships with students and families, and when teachers are masterful in cultivating a positive and joyful classroom culture. Because of this, we support our teachers to effectively manage classrooms by providing them with a school-wide approach to classroom management that is rooted in research-based best practices.

A Balanced, Positive Behavior System

Based on School Values and Restorative + Trauma Informed Practices

Our core values guide our approach to building culture and school discipline. Catalyst's expectations for scholars are aligned with our values and guide the feedback that students receive about the behavioral choices they make on a given day. School structures reinforce expectations and values, and both positive and negative consequences are leveraged to support students to make positive behavioral choices.

A school's culture will not be strong without effective systems to help manage student behavior and choices. Our discipline policy leverages both positive and negative incentives (consequences) to ensure that positive behaviors are reinforced, and scholars receive feedback to make informed behavioral choices in the future.

Catalyst leverages a positive behavior system that is built upon clear and positively framed behavioral expectations for scholars. These expectations, and the related system, are described below.

Catalyst Student Behavioral Expectations

- Create a safe space for the parent/guardian, self and others.

- Bring your best and bring out the best in others.
- Demonstrate the Catalyst core values in your words and actions.
- Do your best work.

Positive Behavioral Support System

At Catalyst, we have developed a discipline policy and behavioral support system that leverages both positive and negative incentives to foster appropriate student behavior. We leverage these incentives to foster both intrinsic and extrinsic motivation so that our scholars develop the agile mindset needed to make mission-appropriate behavioral choices whenever possible. This system includes:

Step 1: Setting and maintaining clear expectations with a focus on predictable routines

We know that we can only hold scholars accountable for their behavioral choices when we, as a school staff, are clear and consistent with our expectations. To this end, Catalyst adopts schoolwide routines and procedures for classroom and school operations. These are well documented in the school's School Culture Playbook, which serves as an anchor text for staff around building culture and implementing the school's discipline policy. Examples of consistent routines and procedures that will be taught and reinforced across the school are illustrated in the chart below. It is important to note that routines and procedures will be more crisply defined in lower elementary grades and at the beginning of the school year. As scholars grow, routines and procedures will morph to ensure that they are developmentally appropriate for scholars over time.

Routines	Procedures
Moving into/out of group work	Passing out papers
Transitioning in and out of classes	Monitoring classroom materials
Habits of Academic Discourse	Taking care of personal needs (tissues, bathroom trips, etc.)
Academic Calls + Response	Marking attendance

Step 2: Proactively Managing the Classroom to Foster Student Success

Once expectations, routines, and procedures are clearly established, the next step in building a positive school culture is ensuring that we, as a staff, are acting in one voice to proactively support students to be successful. This includes ensuring that each and every staff member, from classroom teachers to our office manager to our custodial staff, have internalized our expectations for students and take proactive measures to foster student success. Before the school year begins, and throughout the year as needed, we will convene our staff for professional development around our discipline policy and related routines and practices. Development in this area will include practice-based sessions on the following topics:

- Whole-brain teaching techniques such as calls and responses, choral responses, etc.
- *Teach Like a Champion* techniques such as 100%, Strong Voice, Ratio, and Do it Again¹

¹ Lemov, D. (2010). *Teach Like a Champion: 49 Techniques that Put Students on the Path to College*. San Francisco, United States: John Wiley & Sons.

- Trauma-informed practices such as predictable routines, constructivist listening techniques, and dyads

Step 3: Clear Incentive Systems Aligned with Expectations

Our discipline policy encourages positive behavior and asks that our staff recognize positive behavior consistently. Research has shown that praise dramatically exceeds negative criticism in high-performing teams². To this end the Catalyst discipline policy has a set of positive and negative incentives that are aligned with behavior expectations. When scholars exhibit positive behaviors, they earn points via an online behavior management system. When scholars exhibit negative behaviors, points are reduced. We will leverage an online system such as PBIS Rewards, Deans List, or Kickboard to gather and analyze this data throughout the school week.

Elements of this incentive system include:

- Incentive-based equity framework:** At Catalyst, we know that for scholars to thrive, each child must be deeply connected to school. All too often, behavioral systems that are meant to support end up marginalizing students who struggle with their behavior the most. To mitigate against this risk, Catalyst will leverage an incentive framework inspired by work at the KIPP network of schools. This framework ensures that all students, regardless of their behavior, are positively recognized for their contributions to the school at least monthly. This framework is described in more detail at the end of this attachment.
- Individualized weekly reports:** At the end of each week, scholars will receive a detailed Catalyst report that will go home to families. The report provides a detailed glimpse into the scholar's week and will showcase information such as attendance, positive behavior, negative behavior, and academic grades. A point system tied to each element will generate a weekly score for scholars. Scholars who earn above a certain threshold on the report are eligible for certain rewards and incentives while scholars who struggle receive additional behavioral and social-emotional supports. A description of the point system used for these reports is described in more detail at the end of this attachment.
- Class scores and values-based rewards and competitions:** At Catalyst, we foster an inclusive environment by ensuring that we support scholars to reach their individual goals, as well as focusing on collective success. To this end, our discipline policy and system encourages appropriate and ethical behavior by appealing to the individual as well as the group. Classes will end with students earning a class score—a way of measuring the extent to which the class demonstrated the school values during that instructional block. Individuals, classes, and grade levels will also earn rewards of various kinds by meeting specific benchmarks over the course of the year.
- A matrix of behaviors made transparent to all stakeholders with a focus on leveraging logical rewards and consequences.** This framework, which moves from Level 2 to Level -1, is shown below:

² Zenger, J., & Folkman, J. (2013, March 15). The Ideal Praise-to-Criticism Ratio. Retrieved January 28, 2019, from <https://www.rentonschools.us/Page/1644>

Catalyst Incentive System and Behavioral Framework: Level 2

Level 2: Change-Maker Behaviors: When scholars demonstrate change-maker behaviors they are acting in a way that not only exemplifies our mission and values, but they are going above and beyond to make our school environment an incredibly safe and special place for all. Change-maker behaviors are typically unprompted, are aligned to our core values, and scholars receive significant recognition when they are demonstrated.

Example Change-Maker Behaviors

- Equity
 - Helping a peer who was feeling left out
 - Calling out a perceived inequity in an appropriate manner
 - Seeing across lines of difference to make a positive impact
- Leadership
 - Seeing a problem and finding an appropriate solution
 - Working exceptionally well with a peer or team
 - Speaking one's truth in a way that brings others along and builds culture
- Joy
 - Facing challenges with enthusiasm
 - Expressing joy when engaged in an academic task
 - Expressing enthusiasm when trying a new skill or task
- Courage
 - Standing up for what is right, even when it's hard
 - Telling the truth
 - Trying a new athletic activity when a scholar is unsure if they can
- Achievement
 - Completing all assignments/homework for a week
 - Demonstrating perseverance to complete a challenging task
 - Helping peers so that a group can accomplish something great
- Wellness
 - Taking advantage of self-regulation support to make better choices in class
 - Journaling weekly to process thoughts and feelings
 - Supporting others to develop their wellness in unique ways

Reinforcement of Change-Maker Behaviors

- Precise Praise (verbal recognition of positive behavior)
- Earning of points via report system
- Shout-out cards
- Super merit (publicly given certificate of recognition with associated points in system)

Catalyst Incentive System and Behavioral Framework: Level 1

Level 1: Difference-Maker Behaviors: Difference-maker behaviors are behaviors that ensure that we are building a culture that is aligned to our mission and values. While they might not be as notable and exemplary as Change-Making behaviors, they are vital to the success of individual scholars and our school. These behaviors are beyond mere compliance and we positively recognize them when we see them.

Catalyst Incentive System and Behavioral Framework: Level 1

Example Difference-Maker Behaviors

- Equity
 - Giving another scholar a turn to go first
 - Finding a way to share materials fairly
 - Showing kindness in a fair manner
 - Encouraging others to participate
- Leadership
 - Speaking in class when nervous or shy
 - Helping a classmate
 - Voicing opinions and ideas appropriately
- Joy
 - Showing contagious enthusiasm
 - Encouraging a fellow student
 - Displaying exemplary participation
- Courage
 - Presenting a passion project with confidence
 - Making good choices, even when it's a challenge
- Achievement
 - Demonstrating exemplary organization
 - Showing pride in academic accomplishments
 - Completing excellent homework
 - Showing scholarly habits
 - Making an insightful question or comment
- Wellness
 - Making a healthy choice at lunch or snack
 - Organizing a game or race at recess
 - Journaling during free choice time

Positive Consequences for Demonstrations of Level I Expected Behaviors

- Precise Praise (verbal recognition of positive behavior)
- Earning of points via report system
- Shout-out cards

Catalyst Incentive System and Behavioral Framework: Level 0

Level 0 Behaviors: Level 0 behaviors are defined as basic expectations of the learning environment that the majority of scholars can meet with minimal redirections and support. Level 0 behaviors are also the behaviors that need to be demonstrated to ensure that our school environment is physically and emotionally safe. Level 0 behaviors are explicitly taught during Catalyst Kickstart and are reinforced over the course of the school year. Scholars internalize college and life rationale for the reasons why Level 0 behaviors are expected and can articulate these rationales. When scholars struggle to demonstrate Level 0 behaviors we first assume that the expectation is not clear and that the scholar may need a bit of support to meet the expectations. Reactions when scholars struggle to demonstrate these behaviors will illustrate this belief.

Catalyst Incentive System and Behavioral Framework: Level 0

Level 0: Expected Behaviors

- Following staff instructions to ensure classes run smoothly
- Attending school regularly, on time, and staying the full day
- Following the school dress code
- Demonstrating actions that are aligned with the school's values
- Demonstrating kindness and respect to others
- Respecting oneself, each other, and our school and community environment
- Respecting differences between self and other

Level 0: Violations of Expected Behaviors

- Name calling, teasing, inappropriate joking
- Rough-housing
- Cheating or lying
- Harming school or personal property
- Repeatedly refusing to follow staff instructions
- Using profane or other inappropriate language

Positive Consequences for Demonstrations of Level 0 Expected Behaviors

- Precise Praise (verbal recognition of positive behavior)
- Peer modeling of expected behaviors
- Earning of points via report system

Corrective Consequences for Violations of Level 0 Expected Behaviors

- Restating + reteaching the expectation
- Verbal correction + redirection
- Loss of points via report system
- Conference with staff member
- Call or other communication to the family

Catalyst Incentive System and Behavioral Framework: Level -1

Level -1 Behaviors: Level -1 behaviors are those that cause significant interruption to the learning environment and jeopardize safety.

Expected behaviors

- See Level 0

Positive Consequences for Demonstrations of Level -1 Behaviors

- See Level 0

Catalyst Incentive System and Behavioral Framework: Level -1

Corrective Consequences for Level -1 Behaviors

- Restorative circle with scholars and staff
- School behavioral and/or social-emotional supports
- Short removal from instructional space and/or loss of privileges
- Conference with staff member
- Call or other communication to the family
- Behavior contract
- Counseling check in with school administrator

Repeated Level -1 Behaviors: If scholars continue to demonstrate Level -1 behaviors and have participated in a variety of restorative and trauma-informed interventions, suspension and/or expulsion may be considered by the team. Policies and procedures related to suspension and expulsion are described later in this attachment.

Catalyst Incentive System and Behavioral Framework: Restorative and Trauma-Informed Practices

Restorative and Trauma-Informed Practices: At each of the levels of behavior (especially levels -1 to 0) we ensure that our responses to violations of expected behavior are aligned with building a schoolwide culture of hope and connection. Even when scholars struggle to meet behavioral expectations and demonstrate school values, we never want them to internalize shame or self-doubt. Because of this, we incorporate restorative and trauma-informed practices into procedures when scholars demonstrate violations to expected behaviors. These are outlined below.

Catalyst Incentive System and Behavioral Framework: Restorative and Trauma-Informed Practices

Examples of Practices and Structures

- Repeated Level 0 Violations
 - 1:1 conference with teacher during which affective statements are used to help the scholar self-regulate and process: During this interaction the scholar and staff will have a conversation to understand the impact of the behavior on others and attempt to identify causes of the behavior and solutions. This allows the relationship between the scholar and teacher to remain strong and reinforces trust.
 - Self-regulation supports: School leaders at Catalyst will offer small group self-regulation lunch bunches with scholars who struggle meeting level 0 expectations. These are not punitive, but rather they are proactive measures to meet students where they are and provide the supports they need to flourish.
- Repeated Level -1 Violations: The following supports will take place after any behavioral or disciplinary event has happened and will typically occur in a 1:1 setting or a setting where family of the scholar is engaged.
 - Integration of an adapted Listen, Protect, Connect—Model and Teach (LPC—MT) protocol: This protocol is often used in providing mental health first aid to individuals who have experienced extreme stress or trauma. For students who consistently demonstrate Level -1 violations, we will use this to help students process more severe behavioral incidents and discover and practice more appropriate and regulated ways to cope with stress or anxiety in the classroom.
 - Restorative Circles and Reparation Contracts: For events where significant trust between individuals in the school community has been damaged, restorative circles will be held. Holding circles is an integrated part of our approach to building culture at Catalyst; community circles and faculty circles are part of daily huddles and sunrise time. Restorative circles are a specific type of restorative practice aimed at rebuilding trust and ensuring that the scholar who has violated an expectation becomes reconnected to school, peers, and staff. During the circle, the scholar and their families will be invited, as well as, when appropriate, other individuals impacted by the incident.

Attendance Policy

Every day is important at Catalyst. Consistent school attendance is important to a scholar's ongoing progress. Our scholars are expected and required by law to attend school every day that school is in session, except for the following excused absences (RCW 28A.225.010):

- Student illnesses
- Family emergency
- Doctor or dental appointments
- Prearranged trip
- Reason of faith or conscience (2 days per year)

Tardies: Scholars are expected to be in the classroom and ready to learn by the time class starts. Students who are late to school must check in at the main office to get a pass to class. Teachers will record tardies in the student information system whenever a student is late to class.

Unexcused Absences: Parent/guardians are expected to notify the school office in case of an absence immediately. If the office is not notified by telephone or a note indicating the reason for the absence within three days, the absence will be considered truancy.

Pre-arranged Absences: For parents/guardians wishing to have a scholar released from school for reasons other than illness, permission will be granted subject to the following conditions:

- A request by parent/guardian should be made in advance of the absence either by sending a note or calling the school office.
- Make-up work is the scholar's responsibility. Classroom participation and project work are difficult to make up; therefore, a student's evaluation in a class or on a project may be affected by absences.

Attendance Procedure

For safety purposes, Catalyst is a closed campus. All scholars need to check in and out of school through the main office. Scholars are not allowed to leave campus at any time during the school day without a parent, guardian, or sibling named on the child's registration paperwork. This person will be required to sign in and provide valid identification. If a parent/guardian wishes to have an alternative person pick the scholar up, they must notify the school in advance. The school will also maintain a "Do Not Release" list based on named people from scholars' registration paperwork in the main office. If a scholar is reported absent by school staff, an attempt will be made to contact the parent/guardian by telephone as soon as possible. The staff will take attendance at the beginning of every school day via the school's student information system. The main office will call the parents/guardians of any scholars for whom there was no prior notice of absenteeism.

b. Suspensions and Expulsions from School

Catalyst believes that the vast majority of disciplinary issues that arise at school can be addressed via methods that do not involve suspensions or expulsions. In the rare cases that these consequences are warranted, the following policies, aligned with Washington state law, will guide our decision making.

Student Discipline and Corrective Action Policy

Rules of student conduct are essential for maintaining a safe and supporting learning environment for all students. A student's refusal to comply with written rules and regulations established for the governing of the school will constitute sufficient cause for disciplinary action.

Staff are responsible for supervising student behavior, employing effective classroom management methods, and enforcing the rules of student conduct in a fair, consistent, and non-discriminatory manner. Disciplinary action must be reasonable, culturally responsive, and necessary under the circumstances, while reflecting the Catalyst's priority to maintain a safe and positive learning environment for all students and staff. Catalyst will administer disciplinary action in a way that responds to the needs and strengths of students, supports students in meeting behavioral expectations, and keeps them within the classroom to the maximum extent possible.

When administering discipline under this policy and the related procedure, Catalyst staff must not:

- Unlawfully discriminate against a student on the basis of sex, race, creed, religion, color, national origin, age, veteran or military status, sexual orientation, gender expression or identity, disability, or the use of a trained dog guide or service animal;
- Deprive a student of constitutional rights to: freedom of speech, press, peaceable assembly; petition the government and its representatives for a redress of grievances; free exercise of religion; freedom from sectarian control or influence; subject to reasonable time, place, and manner limitations on exercising such rights;
- Deprive a student of the constitutional right to be secure in the person, papers, and effects against unreasonable searches and seizures;
- Unlawfully interfere in a student's pursuit of an education while in the custody of the Charter School; or
- Deprive a student of the right to an equal educational opportunity, in whole or in part, without due process of law.

Catalyst will distribute its discipline policy and procedure to scholars, their parents/guardians, and the community on an annual basis. Catalyst will provide scholars and/or their parents/guardians with all required substantive and procedural due process concerning grievances, hearings, and/or appeals of corrective action. Catalyst will ensure that it provides such information with language assistance for students and parents with limited English proficiency under Title VI of the Civil Rights Act of 1964.

Catalyst will also strive to provide trainings regarding policies and procedures related to student discipline for appropriate school and Catalyst staff whose duties require them to interact with students and enforce or implement components of student discipline.

Catalyst will assist long-term suspended and expelled scholars in returning to school as soon as possible by providing them with a re-engagement plan tailored to the scholar's individual circumstances, including consideration of the incident that led to the scholar's long-term suspension or expulsion.

Catalyst, however, may preclude a scholar from returning to the scholar's regular educational setting following the end date of a suspension or expulsion for the purpose of protecting victims of certain offenses, as follows:

- A student committing an offense under RCW 28A.600.460 (2), when the activity is directed toward the teacher, shall not be assigned to that teacher's classroom for the duration of the student's attendance at that school or any other school where the teacher is assigned; and
- A student who commits an offense under RCW 28A.600.460 (3), when directed toward another student, may be removed from the classroom of the victim for the duration of the student's attendance at that school or any other school where the victim is enrolled.

In consultation with Catalyst staff, scholars, families, and the community, Catalyst will periodically review and update this policy and its accompanying procedure. The following policies has been modeled after the Washington State School Directors Association model policies 3241 and 3241P regarding Classroom Management, Discipline, and Corrective Action.

Procedures for Classroom Management, Discipline, and Corrective Action

Definitions

1. "Behavioral violation" means a student's behavior that violates the Charter School's discipline policies.
2. "Classroom exclusion" means the exclusion of a student from a classroom or instructional or activity area for behavioral violations, subject to the requirements of WAC 392-400-330 and 392-400-335. Classroom exclusion does not include action that results in missed instruction for a brief duration when:
 - i. A teacher or other school personnel attempts other forms of discipline to support the student in meeting behavioral expectations; and
 - ii. The student remains under the supervision of the teacher or other school personnel during such brief duration.
3. "Corrective action" means discipline, classroom exclusion, suspension, emergency expulsion, or expulsion.
4. "Culturally responsive" has the same meaning as "cultural competency" in RCW 28A.410.270.
5. "Discipline" and "other forms of discipline" mean all forms of corrective action used in response to behavioral violations other than classroom exclusion, suspension, expulsion, or emergency expulsion, which may involve the use of best practices and strategies included in the state menu for behavior developed under RCW 28A.165.035.
6. "Discretionary discipline" means any disciplinary action taken in response to student misconduct that violates the rules, policies, or procedures adopted by the board of directors, other than the misconduct listed in one or more of the categories in this procedure set forth below in the section entitled "Suspension, Expulsions, and Discretionary Discipline." Discretionary discipline cannot include long-term suspension or expulsion.
7. "Disruption of the educational process" means the interruption of classwork, the creation of disorder, or the invasion of the rights of a student or group of students.
8. "Emergency expulsion" means an emergency removal from school for up to, but not exceeding, ten (10) consecutive school days from the student's current school placement by the school principals or designee. An emergency expulsion requires the school principals or designee to have good and sufficient reason to believe that the student's presence poses an immediate and continuing danger to other students or school staff or an immediate and continuing threat of substantial disruption of the educational process. An emergency expulsion must end or be converted to another form of corrective action within ten (10) school days from the date of the emergency removal from school. If the Charter School converts the emergency expulsion to

another form of corrective action, it must provide notice and an explanation of due process rights to the student and parent/guardian.

9. "Expulsion" means a denial of attendance for a period of time up to but no longer than length of an academic term (as defined by the board of directors) from the time the student is removed from their current school placement by a Charter school principal or designee. An expulsion may not be for an indefinite period of time and may not be imposed as a form of discretionary discipline. An expulsion may be extended beyond the length of an academic term if: 1) the school principal petitions the Charter School board for an extension; and 2) the Charter School principal authorizes the extension pursuant to the school principals of public instruction's rules adopted for this purpose (see Petition for Extension of Length of Expulsion below). An expulsion may also include a denial of admission to, or entry upon, real or personal property that is owned, leased, rented, or controlled by the Charter School.
10. "Length of an academic term" means the total number of school days in a single trimester or semester, as defined by the board of directors.
11. "Parent" means a biological, adoptive, or foster parent, or a guardian generally authorized to act as parent or specifically authorized to make education decisions. The definition of parent does not include the state, if the student is a ward of the state. When more than one party meets the qualifications to act as a parent, the biological or adoptive parent must be presumed to be the parent unless the biological or adoptive parent does not have legal authority to make educational decisions for the student or if a judicial decree or order identifies a specific person or persons. See WAC 392-172A-01125.
12. "School business day" means any calendar day except Saturdays, Sundays, and any federal and school holidays upon which the office of the school principal is open to the public for business. A school business day concludes or terminates upon the closure of the school principal's office for the calendar day.
13. "School day" means a calendar day, except school holidays, on which enrolled students are afforded the opportunity to be engaged in educational activity planned, supervised, and conducted by or under the supervision of certificated staff, and on which day all or any portion of enrolled students participate in such educational activity.
14. "Suspension" means the denial of attendance in response to a behavioral violation from any subject or class, or from any full schedule of subjects or classes, but not including classroom exclusions, expulsions, or emergency expulsions. Suspension may also include denial of admission to, or entry upon, real and personal property that is owned, leased, rented, or controlled by the Charter School.
15. "Short-term suspension" means suspension for any portion of a calendar day up to and not exceeding ten (10) consecutive school days.
16. "Long-term suspension" means a suspension that exceeds ten (10) consecutive school days. A long-term suspension may not exceed the length of an academic term (as defined by the Charter School's board of trustees), cannot be imposed beyond the school year in which the alleged misbehavior occurs, and may not be imposed except for the offenses listed below in the section entitled "Suspension, Expulsions, and Discretionary Discipline."
17. Note that in the first two years of the school's operation the school's co-founders will act as the leaders of the school. Beginning in Year 3 a principal will be hired for the school. The term "principal" in these policies refers to the school leader(s) in charge for the grade level where any behavioral need has occurred.

Authority of School Principals

The school principals will have the authority to discipline, suspend, or expel scholars. The school principals will:

- Identify the conditions under which a teacher may exclude a student from their class; and

- Designate which staff members have the authority to initiate or to impose discipline, suspensions, or expulsions.

No scholar will be expelled, suspended, or disciplined in any manner for the performance of or failure to perform any act not related to the orderly operation of the school or school-sponsored activities or any other aspect of the educational process.

No form of discipline will be enforced in such a manner as to prevent a student from accomplishing a specific academic grade, subject, or graduation requirements.

Notification of suspensions of students eligible for special education services

The principal will notify special education staff of any suspensions to be imposed on a student who is currently eligible for special education services or any student who might be deemed eligible for special education. To the extent that suspensions may cumulatively or consecutively exceed ten (10) days, the principal will notify relevant special education staff so that the Charter School can ensure compliance with special education discipline procedures.

Notification of procedures relating to student behavior

Principals in the school will annually publish and make available to students, parents/ guardians, staff, and the community the rules, policies, and procedures of the Charter School that establish misconduct, and the written procedures for administering corrective action. The publication will also define student rights and responsibilities relating to student behavior.

Pursuant to the Drug-Free Schools and Communities Act (Amendments of 1989), students and parents/guardians will be given annual notice of the standard of conduct the Charter School requires regarding controlled substance and alcohol use, and a statement of the disciplinary sanctions for violations of that standard.

The Charter School will also, in consultation with staff, scholars, scholars' families, and the community, periodically review and update the Charter School's rules, policies, and procedures related to student discipline.

Fundamental rights

When administering discipline under this chapter, the Charter School must not:

- (1) Unlawfully discriminate against a student on the basis of sex, race, creed, religion, color, national origin, age, veteran or military status, sexual orientation, gender expression or identity, disability, or the use of a trained dog guide or service animal;
- (2) Deprive a student of the student's constitutional right to freedom of speech and press, the constitutional right to peaceably assemble and to petition the government and its representatives for a redress of grievances, the constitutional right to the free exercise of religion and to have the student's school free from sectarian control or influence, subject to reasonable limitations upon the time, place, and manner of exercising the right;
- (3) Deprive a student of the student's constitutional right to be secure in the student's person, papers, and effects against unreasonable searches and seizures;
- (4) Unlawfully interfere in a student's pursuit of an education while in the custody of the Charter School; or

(5) Deprive a student of the student's right to an equal educational opportunity, in whole or in part, by a Charter School without due process of law.

Rights and responsibilities of certificated staff

Certificated staff will have the right to:

- Expect students to comply with school rules.
- Develop and/or review building rules relating to student conduct and behavioral expectations at least once each year.
- Receive any complaint or grievance regarding corrective action of students. Certificated staff will be given the opportunity to present their version of the incident and to meet with the complaining party, in the event that a conference is arranged.
- Use such reasonable action as is necessary to protect himself/ herself, a student, or others from physical abuse or injury.

Teachers have the right to exclude any student from the teacher's classroom, instructional area, or activity area for behavioral violations that disrupt the educational process while the student is under the teacher's immediate supervision, subject to the requirements of WAC 392-400-335 and the section below (see Classroom Exclusions).

Certificated staff will have the responsibility to:

- Observe the rights of students.
- Supervise student behavior and enforce the rules of student conduct fairly, consistently, and without discrimination. Any infractions will be reported orally and in writing to the principal as soon as possible, regardless of any corrective actions taken by the teacher.
- Maintain good order in the classroom, in the hallways, on the playgrounds, or other common areas of the school, and on school buses (i.e., during field trips).
- Maintain accurate attendance records and report all cases of truancy.
- Set an appropriate example of personal conduct and avoid statements that may be demeaning or personally offensive to any student or group of students.
- Meet with a parent(s) within five (5) school days upon request to hear a complaint regarding the use of classroom materials and/or teaching strategies that are being employed in the classroom.

Principals will have the responsibility to:

- Impose suspension or expulsion when appropriate;
- Notify parents when students are suspended or expelled; and
- Confer with certificated staff at least once per year, to develop and/or review rules of conduct to be employed in the school and corrective actions that may be employed in the event of rule infractions.

Restrictions on corrective action: Educational services

The Charter School will not suspend the provision of educational services as a disciplinary action, nor will schools suspend the provision of educational services to a student in response to behavioral violations.

Schools will provide the student the opportunity to receive educational services during a suspension, expulsion, or emergency expulsion. The educational services must enable the student to:

- Continue to participate in the general education curriculum;
- Meet the educational standards established within the Charter School; and
- Complete subject, grade-level, and graduation requirements.

Such services may be provided in an alternative setting, provided that such setting is comparable, equitable, and appropriate to the regular educational services a student would have received in the absence of exclusionary discipline. Examples of alternative setting may include, but not be limited to, alternative schools or classrooms, one-on-one tutoring when available, and online learning.

When providing a student with the opportunity to receive educational services under this section, the school must consider:

- Meaningful input from the student, parents, and the student's teachers;
- Whether the student's regular educational services include English language development services, special education, accommodations and related services under Section 504 of the Rehabilitation Act of 1973, or supplemental services designed to support the student's academic achievement; and
- Access to any necessary technology, transportation, or resources the student needs to participate fully in the educational services.

For students subject to suspension or emergency expulsion up to five (5) days, a school must provide at least the following:

- Coursework, including any assigned homework, from all of the student's regular subjects or classes;
- Access to school personnel who can offer support to keep the student current with assignments and coursework for all of the student's regular subjects or classes; and
- An opportunity for the student to make up any assignments and tests missed during the period of suspension or emergency expulsion.

For students subject to suspension or emergency expulsion for six (6) to ten (10) consecutive school days, a school must provide at least the following:

- Coursework, including any assigned homework, from all of the student's regular subjects or classes.
- An opportunity for the student to make up any assignments and tests missed during the period of suspension or emergency expulsion.
- Access to school personnel who can offer support to keep the student current with assignments and coursework for all of the student's regular subjects or classes. School personnel will make a reasonable attempt to contact the student or parents within three (3) school business days following the start of the suspension or emergency expulsion and periodically thereafter until the suspension or emergency expulsion ends to:
 - Coordinate the delivery and grading of coursework between the student and the student's teacher(s) at a frequency that would allow the student to keep current with assignments and coursework for all of the student's regular subjects or classes; and
 - Communicate with the student, parents, and the student's teacher(s) about the student's academic progress.

For students subject to expulsion or suspension for more than ten (10) consecutive school days, a school will make provisions for educational services in accordance with WAC 392-121-107.

Unexcused absences and tardiness

Students will not be suspended or expelled from school for absences or tardiness.

Denial or Delay of a Nutritionally Adequate Meal Prohibited

Students will not be subjected to correction action in a manner that would result in the denial or delay of a nutritionally adequate meal to a student.

Language Assistance

The Charter School will ensure that notices and communications required in connection with any corrective action are provided in a language the student and parents understand, which may require language assistance for students and parents with limited English proficiency under Title VI of the Civil Rights Act of 1964.

Corporal Punishment

Charter staff may not administer corporal punishment, including any act that willfully inflicts or willfully causes the infliction of physical pain on a student. Corporal punishment does not include:

- The use of reasonable physical force by a school administrator, teacher, school personnel, or volunteer as necessary to maintain order or to prevent a student from harming themselves, other students, school personnel, or property;
- Physical pain or discomfort resulting from or caused by training for or participation in athletic competition or recreational activity voluntarily engaged in by a student; or
- Physical exertion shared by all students in a teacher-directed class activity, which may include, but is not limited to, physical education exercises, field trips, or vocational educational projects.

Restraint and Isolation

Charter staff may not use isolation, restraint, or a restraint device on any student, except as provided for in RCW 28A.155.210, 28A.600.485, WAC 392-172A-02105, and 392-172A-02110.

Alternative forms of corrective action

The board encourages the use of alternative forms of correction action when possible and practicable in light of the duty to maintain safe and orderly school environments conducive to student learning. Charter School administrators may consider alternative forms of corrective action, including programs intended to lessen the time of exclusion from class attendance, which have been approved by the board and/or school principals.

Except in cases involving exceptional misconduct, charter school administrators must impose alternative forms of corrective action for incidents of misbehavior prior to imposing a suspension or expulsion for the same type of misbehavior.

Student disciplinary boards

The board recognizes that a student's behavior may be positively influenced when an incident giving rise to corrective action is reviewed by a panel of the student's peers. The board may, in its discretion, authorize the establishment of one or more student disciplinary boards composed of students, which may also include teachers, administrators, parents or any combination thereof. The student disciplinary board may be authorized to prescribe reasonable discipline and may recommend suspension or expulsion to the appropriate school authority. The school authority will be authorized to set aside or modify the student disciplinary board's recommendation.

Student discipline

The Charter School will administer student discipline to maintain a safe and supportive school environment that is conducive to student learning.

The methods employed in administering the rules of student conduct involve professional judgment. Such judgment should:

- Provide due process and ensure fairness and equity in administration;

- Implement the policy and procedure in a culturally responsive manner;
- Responds to the needs and strengths of students;
- Facilitate collaboration between school personnel, students, and families; and
- Provide a safe and supportive learning environment for all students.

No form of discipline will be administered in such a manner as to prevent a student from accomplishing specific academic grade, subject, or graduation requirements. Appeal procedures have been established in order to provide for an opportunity for every corrective action to be reviewed by someone in authority and to instill confidence among students and parents as to the essential fairness of staff.

Detention

For minor infractions of school rules or regulations, or for minor misconduct, staff may assign students detention during after school hours for not more than 60 minutes on any given day.

Preceding the assignment of detention, the staff member will inform the student of the nature of the offense charged and of the specific conduct that allegedly constitutes the violation. The student will be afforded an opportunity to explain or justify their actions to the staff member.

Students assigned detention for corrective action will be under the direct supervision of the staff member or another member of the professional staff.

Grievance and appeal process for student discipline

Any parent/guardian or student who is aggrieved by the imposition of discipline will have the right to an informal conference with the principal for resolving the grievance. The employee whose action is being grieved will be notified of the grievance as soon as reasonably possible.

At such conference, the student and parent/guardian will be subject to questioning by the principal and will be entitled to question staff involved in the matter being grieved.

After exhausting this remedy, the parent/guardian and student will have the right, upon two (2) school business days' prior notice, to present a written and/or oral grievance to the school principals or designee.

If the grievance is not resolved, the parent/guardian and student, upon two (2) school business days' prior notice, have the right to present a written or oral grievance to the board during its next regular meeting, or at a meeting held within 30 days, whichever is earlier. A closed meeting may be held for considering the grievance. The board will notify the parent and student of its response to the grievance within ten (10) school business days after the date when the grievance was presented. The disciplinary action will continue notwithstanding implementation of the grievance procedure, unless the principal, school principals, or board elects to postpone such action.

Alternatively, the board may delegate its authority to hear and decide discipline and short-term suspension grievance appeals to a charter school disciplinary appeal council established pursuant to WAC 392-400-310(1).

Classroom Exclusions

A teacher may exclude a student from the teacher's classroom, instructional area, or activity area for behavioral violations that disrupt the educational process while the student is under the teacher's immediate supervision. A Charter School may authorize other school personnel to exclude a student from a classroom or instructional or activity area for behavioral violations of the Charter School's discipline

policy. The teacher or other school personnel must first attempt one or more other forms of discipline to support the student in meeting behavioral expectations, unless the student's presence poses an immediate and continuing threat of material and substantial disruption of the educational process.

In administering other forms of discipline, the teacher or other school personnel may consider using best practices and strategies included in the state menu for behavior developed under RCW 28A.165.035.

A classroom exclusion may be administered for all or any portion of the balance of the school day in which the student was excluded from the student's classroom, instructional area, or activity area. When a student is excluded from the student's classroom, instructional area, or activity area for longer than the balance of the school day, the Charter School will provide the student and the student's family notice and due process for a suspension, expulsion, or emergency expulsion, as appropriate. A student may not be removed from school during a classroom exclusion unless the charter school provides such notice and due process for a suspension, expulsion, or emergency expulsion.

The school will provide the student an opportunity to make up any assignments and tests missed during a classroom exclusion.

A student may be removed immediately from a class or subject by a teacher or other authorized personnel without first attempting other forms of corrective action provided that the student's presence poses an immediate and continuing danger to other students or school personnel or an immediate and continuing threat of substantial disruption of the educational process.

Classroom Exclusion: Notice

Following the classroom exclusion of a student, the teacher or other school personnel must report the classroom exclusion, including the behavioral violation that led to the classroom exclusion, to the principal or the principal's designee as soon as reasonably possible.

The teacher, principal, or the principal's designee must notify the student's parents regarding the classroom exclusion as soon as reasonably possible. The Charter School must ensure that this notification is in a language the parents understand, which may require language assistance for parents with limited English proficiency under Title VI of the Civil Rights Act of 1964.

When the teacher or other authorized school personnel administers a classroom exclusion on the grounds that the student's presence poses an immediate and continuing danger to other students or school personnel, or an immediate and continuing threat of material and substantial disruption of the educational process:

- (a) the teacher or other school personnel must immediately notify the principal or the principal's designee; and
- (b) the principal or the principal's designee must meet with the student as soon as reasonably possible and administer appropriate discipline.

Suspensions, Expulsions, and Discretionary Discipline

Suspensions (including long-term suspensions) and expulsions may be imposed for any of the following student behaviors:

- Having a firearm on school property or school transportation in violation of RCW 28A.600.420
- Any of the following offenses listed in RCW 13.04.155, including:
 - Any violent offense as defined in RCW 9.94A.030, including:

- Any felony that Washington law defines as a class A felony or an attempt, criminal conspiracy, or solicitation to commit a class A felony
 - Manslaughter
 - Indecent liberties committed by forcible compulsion
 - Kidnapping
 - Arson
 - Assault in the second degree
 - Assault of a child in the second degree
 - Robbery
 - Drive-by shooting
 - Vehicular homicide or vehicular assault caused by driving a vehicle while under the influence of intoxicating liquor or any drug, or by operating a vehicle in a reckless manner
- Any sex offense as defined in RCW 9A.030, which includes any felony violation of chapter 9A.44 RCW (other than failure to register as a sex offender in violation of 9A.44.132), including rape, rape of a child, child molestation, sexual misconduct with a minor, indecent liberties, voyeurism, and any felony conviction or adjudication with a sexual motivation finding
- Inhaling toxic fumes in violation of chapter 9.47A RCW
- Any controlled substance violation of chapter 69.50 RCW
- Any liquor violation of RCW 66.44.270
- Any weapons violation of chapter 9.41 RCW, including having a dangerous weapon at school in violation of RCW 9.41.280
- Any violation of chapter 9A.36 RCW, including assault, malicious harassment, drive-by shooting, reckless endangerment, promoting a suicide attempt, coercion, assault of a child, custodial assault, and failing to summon assistance for an injured victim of a crime in need of assistance
- Any violation of chapter 9A.40 RCW, including kidnapping, unlawful imprisonment, custodial interference, luring, and human trafficking
- Any violation of chapter 9A.46 RCW, including harassment, stalking, and criminal gang intimidation
- Any violation of chapter 9A.48 RCW, including arson, reckless burning, malicious mischief, and criminal street gang tagging and graffiti
- Two or more violations of the following within a three-year period:
 - Criminal gang intimidation in violation of RCW 9A.46.120
 - Gang activity on school grounds in violation of RCW 28A.600.455
 - Willfully disobeying school administrative personnel in violation of RCW 28A.635.020
 - Defacing or injuring school property in violation of RCW 28A.635.060
- Any student behavior that adversely affects the health or safety of other students or educational staff

Unless otherwise required by law, school administrators are not required to impose a long-term suspension or expulsion for the misconduct listed above, and whenever reasonable, school administrators should first consider alternative sanctions.

For student behaviors—including specific offenses contained in Policy 3240 and procedure 3240P—that do not fall within one or more of the categories listed above, schools may only impose discretionary discipline as defined in this procedure. Schools may not impose long-term suspension or expulsion as a

form of discretionary discipline but may impose other sanctions up to and including short-term suspension in a manner consistent with this procedure.

Short-term suspension: Conditions and limitations

The nature and circumstances of the student conduct violation must reasonably warrant a short-term suspension. As a general rule, no student will be suspended for a short term unless other forms of corrective action reasonably calculated to modify their conduct have previously been imposed upon the student as a consequence of misconduct of the same nature.

No student in grades kindergarten through fourth grade will be suspended for more than a total of ten (10) school days during any single semester or trimester and no loss of academic grades or credit will be imposed by reason of the suspension.

No student in fifth grade and above will be suspended for more than a total of fifteen (15) school days during any single semester or ten (10) school days during any single trimester.

Short-term suspension: Continuation of educational services

The Charter School will not suspend the provision of educational services during a period of short-term suspension and will provide the student the opportunity to receive such services. Educational services may be provided in an alternative setting, provided that such setting is comparable, equitable, and appropriate to the regular educational services a student would have received in the absence of a short-term suspension. Examples of alternative setting may include, but not be limited to, alternative schools or classrooms, one-on-one tutoring when available, and online learning.

The principal will notify special education staff of any short-term suspensions to be imposed for a student who is currently eligible for special education services or those who might be deemed eligible for special education. To the extent that short-term suspensions may cumulatively or consecutively exceed ten school (10) days, (see Procedure 2161P, Special Education and Related Services for Eligible Students, Discipline section) the principal will notify relevant special education staff so that the Charter School can ensure that special education discipline procedures are in place, in addition to general education discipline procedures.

Short-term suspension: In-school suspension

Students who are denied attendance at school are denied the opportunity to learn. The Charter School has therefore created an in-school suspension program which temporarily removes the student from their regular learning environment but permits the student to maintain their educational progress. An in-school suspension is no different from any other suspension as defined by WAC 392-400-205, and therefore triggers the same substantive and procedural due process, including student and parent/guardian notification.

Students who are assigned to in-school suspension are expected to comply with the expectations of staff. The school principals will establish guidelines for the operation of the in-school suspension program.

Short-term suspension: Exceptional misconduct

A student may be short-term suspended for exceptional misconduct, other than absenteeism, when such misconduct is of such frequent occurrence or is so serious in nature and/or is so serious in terms of disruption to the operation of the school that immediate suspension is warranted. In cases of exceptional misconduct, the Charter School may impose a short-term suspension without first attempting alternative forms of corrective action. The school principals, following consultation with a representative ad hoc citizens' committee, will recommend for board adoption, the nature and extent of the corrective actions

that may be imposed as a consequence of exceptional misconduct (see Procedure 3240P). An administrator may grant an exception when warranted by extenuating circumstances.

Short-term suspension: Prior notice and conference

Prior to the short-term suspension of a student, the principals or designee will conduct a conference with the student and provide:

- An oral or written notice of the charges;
- An oral or written explanation of the evidence in support of the allegation(s); **and**
- An oral or written explanation of the short-term suspension that the Charter School may impose.

The Charter School will provide the student with an opportunity to present their explanation of the allegation(s).

If the short-term suspension is to exceed one (1) calendar day, the principal or designee will notify the student's parent/guardian of the reason for the suspension and its duration either orally or by written electronic communication as soon as reasonably possible. The notice will also address the parent/guardian's right to an informal conference pursuant to WAC 392-400-255 and the fact that the Charter School may reduce the student's suspension as a result of such conference.

Short-term suspension: Grievance and appeal process

Any parent/guardian or student who is aggrieved by the imposition of a short-term suspension will have the right to an informal conference with the principals or designee for resolving the grievance. At such conference, the student and parent will be subject to questioning by the principal and will be entitled to question staff involved in the matter being grieved.

The parent/guardian and student after exhausting this remedy will have the right, upon two (2) school business days' prior notice, to present a written and/or oral grievance to the school principals.

If the grievance is not resolved, the parent/guardian and student, upon two (2) school business days' prior notice, will have the right to present a written or oral grievance to the board at its next regular meeting, or at a meeting held within 30 days, whichever is earlier. Such a meeting is not subject to the Open Public Meetings Act and need not to be noticed or open to the public.

The board will notify the parent/guardian and student of its response to the grievance within ten (10) school business days after the date when the grievance was presented. The short-term suspension will continue notwithstanding implementation of the grievance procedure, unless the principal, school principals, or board elects to postpone such action.

Short-term suspension: Readmission

The Charter School will allow any student who has been short-term suspended to make application for readmission at any time in accordance with charter school policy and procedure (see also **Readmission Application Process and Re-engagement** below).

Short-term suspension: Reporting

School principals will record all short-term suspensions that are issued and will report this data to the board of trustees at least quarterly, along with other disciplinary data.

Emergency expulsion: Limitations

An emergency expulsion may not be imposed solely for the purposes of investigating student conduct.

The Charter School principals or a designee may immediately expel and remove a student from school prior to a hearing without other forms of corrective action if the school principals or designee has good and sufficient reason to believe that the student's presence poses:

- An immediate and continuing danger to students or school staff; **or**
- An immediate and continuing threat of substantial disruption of the educational process.

Such emergency expulsion must end or be converted to another form of corrective action within ten (10) school days of the date of the expulsion. If the Charter School converts an emergency expulsion to another form of corrective action, the Charter School will provide the student and/or parents/guardians with notice and due process rights appropriate to the new corrective action.

Emergency expulsion: Notice of hearing

The Charter School will notify the student and their parents/guardians of the emergency expulsion and of their opportunity for a hearing by:

- Hand-delivery of written notice within twenty-four hours of expulsion (charter schools must document delivery of the notice by obtaining the signature of the student's parents/guardians acknowledging receipt or the written certification of the person making the delivery); OR
- Certified letter mailed within twenty-four hours of the expulsion (reasonable attempts to contact the parents/guardians by phone or in person will also be made as soon as reasonably possible).
- The Charter School's written and oral notice of emergency expulsion and opportunity for hearing will:
 - Be provided in a language the student and/or a parent/guardian can understand, if other than English;
 - Specify the alleged reasons that the student's presence poses an immediate and continuing danger to students, school staff, or poses an immediate and continuing threat of substantial disruption of the educational process;
 - Set forth the date on which the emergency expulsion began and when it will end;
 - Set forth the right of the student and/or the student's parents/guardians to a hearing for purposes of contesting the allegations as soon as is reasonably possible; and
 - Set forth the facts that:
 - A written or oral request for hearing must be received by a designated school employee or the employee's office on or before the end of the third school business day after receipt of the notice of opportunity for hearing; AND
 - If the request is not received within three school business days, then the right to a hearing may be deemed waived and the emergency expulsion may be continued, if deemed necessary, for up to ten (10) school days from the date of the student's emergency expulsion from school without any further opportunity for the student or their parent/guardian to contest it.

As a best practice, the Charter School should provide a schedule of school business days with the notice.

The student and/or their parents/guardians must request a hearing within three (3) school business days after receipt of the notice of opportunity for hearing. The family may request the hearing in writing or orally but must make or provide the request to the Charter School employee specified in the notice or their office. If the Charter School does not receive a hearing request within the required period, the

Charter School may deem the right to hearing waived and the Charter School may impose the emergency expulsion for up to ten (10) school days from the date of the expulsion from school.

Emergency expulsion: Prehearing and hearing

If the Charter School receives a request for hearing within three (3) school business days after receipt of notice, the charter school will immediately schedule and give notice of a hearing to commence as soon as reasonably possible and no later than the second school business day after receipt of the request for hearing.

The student and their parents/guardians have the right to:

- Be represented by legal counsel;
- Inspect in advance of the hearing any documentary and physical evidence that the Charter School intends to introduce at hearing;
- Question and confront witnesses (see WAC 392-400-305 for procedure if a charter school witness does not appear);
- Explain the alleged misconduct; and
- Present relevant affidavits, exhibits, and witnesses.

The Charter School and/or its representative have the right to inspect in advance of the hearing evidence that the student and their parents/guardians intend to introduce at the hearing.

The hearing will be conducted before a hearing officer appointed by the school principals. Such hearing officer will not be a witness to the alleged conduct. Ideally, the individual selected to be the hearing officer will possess both charter school administration experience and/or legal training and/or prior experience conducting quasi-judicial hearings. Either a tape-recorded or verbatim record of the hearing will be made.

When students are charged with violating the same rule and have acted in concert and the facts are essentially the same for all students, a single hearing may be conducted for them if the hearing officer believes that the following conditions exist:

- A single hearing will not likely result in confusion; AND
- No student will have their interest substantially prejudiced by a group hearing.

If the hearing officer finds that during the hearing a student's interests will be substantially prejudiced by the group hearing, the hearing officer may order a separate hearing for that student. The parent and student have the right to petition for an individual hearing.

The hearing officer will determine, based solely on the evidence presented at hearing, and set forth in their written decision:

- Findings of fact as to whether the student has been afforded appropriate procedural due process (e.g., notice, opportunity to inspect evidence prior to hearing);
- Findings of fact as to the alleged misconduct;
- A conclusion as to whether the student's immediate and continuing danger to students and/or school staff OR immediate and continuing threat of substantial disruption of the educational process giving rise to the emergency expulsion has terminated; AND
- A conclusion as to whether the emergency expulsion shall be converted to another form of corrective action or stand as imposed.

Within one (1) school business day after the date upon which the hearing concludes, the hearing officer will issue the decision and the Charter School will provide notice of such decision to the student and the student's parents/guardians and legal counsel, if any, by depositing a letter in certified U.S. mail.

If the hearing officer concludes in their decision that the emergency expulsion shall be converted to another form of corrective action, the Charter School must provide notice of all due process rights to the student and parent/guardian for the appropriate corrective action. For appeals from a hearing officer decision regarding an emergency expulsion, see **Appeals of long-term suspension and expulsion** below.

Long-term suspension: Conditions and limitations

Schools may not impose a long-term suspension unless the student's misconduct falls within one or more of the categories listed in this procedure above ("Suspension, Expulsions, and Discretionary Discipline"). If the student's behavior falls within one or more of such categories, a student may be long-term suspended for violation of charter school rules provided that the long-term suspension does not exceed the length of an academic term as defined by the school board. A long-term suspension may not be imposed as a form of discretionary discipline, as defined in this procedure.

The nature and circumstances of the violation must reasonably warrant a long-term suspension. As a general rule, no student will be long-term suspended unless other forms of corrective action reasonably calculated to modify their conduct have previously been imposed upon the student as a consequence of misconduct of the same nature.

No student in grades kindergarten through fourth grade will be long-term suspended during any single semester or trimester and no loss of academic grades or credit will be imposed by reason of the suspension.

No student in fifth grade and above will be long-term suspended in a manner that causes the student to lose academic grades or credit for longer than one semester or trimester during the same school year.

The principal will notify special education staff of any long-term suspension to be imposed for a student who is currently eligible for special education services or those who might be deemed eligible for special education. To the extent that suspensions may cumulatively or consecutively exceed ten (10) days, the principal will notify relevant special education staff so that the Charter School can ensure that special education discipline procedures are in place, in addition to general education discipline procedures.

Long-term suspension: Exceptional misconduct

A student may be long-term suspended for exceptional misconduct, other than absenteeism, when such misconduct is of such frequent occurrence or is so serious in nature and/or is so serious in terms of disruptive effect on the operation of the school that an immediate resort to a long-term suspension is warranted. In cases of exceptional misconduct, a long-term suspension may be imposed without first attempting alternative forms of corrective action. The school principals, following consultation with a representative ad hoc citizens' committee, will recommend for board approval, the nature and extent of the corrective actions which may be imposed as a consequence of exceptional misconduct. (See Procedure 3240P). An exception may be granted by an administrator and/or hearing officer when warranted by extenuating circumstances.

Long-term suspension: Notice of hearing

Prior to imposing a long-term suspension, the Charter School will provide the student and/or their parents/guardians a written notice of opportunity for hearing. The notice will be delivered in person or by certified mail. The notice will:

- Be provided in a language the student and their parents/guardians can understand, if other than English;
- Specify the alleged misconduct and the charter school rule(s) alleged to have been violated;
- Set forth the proposed long-term suspension;
- Set forth the right to a hearing for the purpose of contesting the allegation(s); AND
- Set forth the facts that:
 - A written or oral request for hearing must be received by (*insert designated staff member*) or their office on or before the end of the third school business day after the notice is received; and
 - If such a request is not received within that period, the hearing will be deemed waived and the proposed long-term suspension may be imposed without further opportunity for the student and/or their parent/guardian to contest it.

As a best practice, the Charter School should provide a schedule of school business days with the notice.

The student and/or their parents/guardians must request a hearing within three (3) school business days after receipt of the notice of opportunity for hearing. The request may be provided in writing or orally but must be provided to the Charter School employee specified in the notice or their office. If a request for hearing is not received within the required period, the Charter School may deem the right to hearing waived and the long-term suspension may be imposed.

Long-term suspension: Pre-hearing and hearing

If a request for hearing is received within three (3) school business days after receipt of notice, the charter school will schedule a hearing to begin within three (3) school business days after the date of receiving the request.

The student and parent/guardian have the right to:

- Be represented by legal counsel;
- Inspect in advance of the hearing any documentary and physical evidence that the Charter School intends to introduce at hearing;
- Question and confront witnesses (see WAC 392-400-305 for procedure if a charter school witness does not appear);
- Explain the alleged misconduct; and
- Present relevant affidavits, exhibits, and witnesses.

The Charter School and/or its representative have the right to inspect in advance of the hearing evidence that the student and their parents/guardians intend to introduce at the hearing. Either a tape-recorded or verbatim record of the hearing will be made.

The hearing will be conducted before a hearing officer appointed by the school principals. Such hearing officer will not be a witness to the alleged conduct. Ideally, the individual selected to be the hearing officer will possess both charter school administration experience and/or legal training and/or prior experience conducting administrative hearings.

When students are charged with violating the same rule and have acted in concert and the facts are essentially the same for all students, a single hearing may be conducted for them if the hearing officer believes that the following conditions exist:

- A single hearing will not likely result in confusion; AND

- No student will have their interest substantially prejudiced by a group hearing.

If the hearing officer finds that during the hearing a student's interests will be substantially prejudiced by the group hearing, the hearing officer may order a separate hearing for that student. The parent and student have the right to petition for an individual hearing.

The hearing officer will determine, based solely on the evidence presented at hearing, and set forth in their written decision:

- Findings of fact as to whether the student has been afforded appropriate procedural due process (e.g., notice, opportunity to inspect evidence prior to hearing);
- Findings of fact as to the alleged misconduct; AND
- A conclusion as to whether the nature and duration of the proposed long-term suspension is appropriate or whether a lesser form of corrective action should be imposed.

The hearing officer will issue the decision and the Charter School will provide notice of such decision to the student's legal counsel, or, if none, to the student's and their parents/guardians.

If the hearing officer decides that a long-term suspension is appropriate, the parent/guardian and student will have the right to appeal that decision to the school board or Charter School disciplinary appeal council by filing a written or oral notice of appeal at the office of the school principals or the hearing officer within three (3) school business days after the date of receipt of the decision.

If a timely notice of appeal is not provided to the Charter School, the long-term suspension may be imposed as of the calendar day following expiration of the three (3) school business day period (see **Appeal Process for Long-Term Suspension or Expulsion**, below).

Long-term suspension: Readmission

Any student who has been long-term suspended will be allowed to make application for readmission at any time in accordance with charter school policy and procedure. (See also **Readmission Application Process and Re-engagement**, below)

Long-term suspension: Reporting

Principals will report all long-term suspensions and the reasons therefor to the school principals or designee within twenty-four (24) hours after the imposing the expulsion.

Expulsion: Conditions and limitations

Schools may not expel a student unless the student's misconduct falls within one or more of the categories listed in this procedure above ("Suspension, Expulsions, and Discretionary Discipline"). If the student's behavior falls within one or more of such categories, a student may be expelled for a violation of Charter School rules, provided that the expulsion does not exceed the length of an academic term as defined by the school board. An emergency expulsion may not be imposed as a form of discretionary discipline, as defined in this procedure.

The nature and circumstances of the alleged violation must reasonably warrant the harshness of expulsion. No student will be expelled unless other forms of corrective action reasonably calculated to modify the student's conduct have failed or there is good reason to believe that other forms of corrective action would fail if used.

The Charter School will make reasonable efforts to assist students in returning to an educational setting prior to, and no later than, the end date of the expulsion.

An expulsion may not exceed the length of the academic term unless:

- The school petitions the school board for an extension; AND
- The school board authorizes the extension in compliance with the Superintendent of Public Instruction's rules adopted for this purpose (see **Petition for extension of expulsion** below).

Once a student is expelled in compliance with charter school policy, the expulsion will be brought to the attention of appropriate local and state authorities, including, but not limited to, juvenile authorities acting pursuant to the Basic Juvenile Court Act, so that such authorities may address the student's educational needs.

Any elementary or secondary school student who is determined to have carried a firearm onto, or to have possessed a firearm on, public elementary or secondary school premises, public school-provided transportation, or areas of facilities while being used exclusively by public schools, will be expelled from school for not less than one calendar year pursuant to RCW 28A.600.420 with notification to parents/guardians and law enforcement. The school principals may modify the expulsion of a student on a case-by-case basis.

Expulsion: Firearm Exception

In accordance with RCW 28A.600.420, a charter school must expel a student for no less than one year if the Charter School has determined that the student has carried or possessed a firearm on school premises, school-provided transportation, or areas of facilities while being used exclusively by public schools. The school principals may modify the expulsion on a case-by-case basis.

Charter School may also suspend or expel a student for up to one year if the student acts with malice (as defined under RCW 9A.04.110) and displays an instrument that appears to be a firearm on school premises, school-provided transportation, or areas of facilities while being used exclusively by public schools.

These provisions do not apply to:

- Any student while engaged in military education authorized by the Charter School in which rifles are used;
- Any student while involved in a convention, showing, demonstration, lecture, or firearms safety course authorized by the Charter School; or
- Any student while participating in a rifle competition authorized by the Charter School.

Expulsion: Notice of hearing

Prior to the expulsion of a student, the Charter School will provide the student and/or their parents/guardians a written notice of opportunity for hearing. The notice will be delivered in person or by certified mail. The notice will:

- Be provided in a language the student and their parents/guardians can understand, if other than English;
- Specify the alleged misconduct and the charter school rule(s) alleged to have been violated;
- Set forth the proposed expulsion;
- Set forth the right to a hearing for the purpose of contesting the allegation(s); AND

- Set forth the facts that:
 - A written or oral request for hearing must be received by (*insert designated staff member*) or their office on or before the end of the third school business day after the notice is received; and
 - If such a request is not received within that period, the hearing will be deemed waived and the proposed long-term suspension may be imposed without further opportunity for the student and/or their parent/guardian to contest it.

Expulsion: Prehearing and hearing

If a request for hearing is received within three (3) school business days after receipt of notice, the Charter School will schedule a hearing to begin within three (3) school business days after the date of receiving the request. The student and parent/guardian have the right to:

- Be represented by legal counsel;
- Inspect in advance of the hearing any documentary and physical evidence that the Charter School intends to introduce at hearing;
- Question and confront witnesses (see WAC 392-400-305 for procedure if a charter school witness does not appear);
- Explain the alleged misconduct; and
- Present relevant affidavits, exhibits, and witnesses.

The Charter School and/or its representative have the right to inspect in advance of the hearing evidence that the student and their parents/guardians intend to introduce at the hearing. Either a tape-recorded or verbatim record of the hearing will be made.

The hearing will be conducted before a hearing officer appointed by the school principals. Such hearing officer will not be a witness to the alleged conduct. Ideally, the individual selected to be the hearing officer will possess both charter school administration experience and/or legal training and/or prior experience conducting quasi-judicial hearings.

The hearing is a quasi-judicial process exempt from the Open Public Meetings Act (OPMA). To protect the privacy of student(s) and others involved, the hearing will be held without public notice and without public access unless the student(s) and/or the parent(s)/guardian(s) or their counsel requests an open hearing. Regardless of whether the hearing is open or closed, the Charter School will comply with the Family Educational Rights and Privacy Act (FERPA) in regard to confidentiality of student education records.

When students are charged with violating the same rule and have acted in concert and the facts are essentially the same for all students, a single hearing may be conducted for them if the hearing officer believes that the following conditions exist:

- A single hearing will not likely result in confusion; AND
- No student will have their interest substantially prejudiced by a group hearing.

If the hearing officer finds that during the hearing a student's interests will be substantially prejudiced by the group hearing, the hearing officer may order a separate hearing for that student. The parent and student have the right to petition for an individual hearing.

The hearing officer will determine, based solely on the evidence presented at hearing, and set forth in their written decision:

- Findings of fact as to whether the student has been afforded appropriate procedural due process (e.g., notice, opportunity to inspect evidence prior to hearing);
- Findings of fact as to the alleged misconduct; AND
- A conclusion as to whether the expulsion is appropriate OR whether a lesser form of corrective action should be imposed.

The hearing officer will issue the decision and the Charter School will provide notice of such decision to the student's legal counsel, or, if none, to the student's and their parents/guardians.

The student and parent/guardian will have the right to appeal the hearing officer's decision to the school board or charter school disciplinary appeal council by filing a written or oral notice of appeal at the office of the school principals or the hearing officer within three (3) school business days after the date of receipt of the decision. If a timely notice of appeal is not provided to the Charter School, the expulsion may be imposed as of the calendar day following expiration of the three (3) school business day period.

If a timely notice of appeal is received, see **Appeal Process for Long-Term Suspension or Expulsion**, below.

Expulsion: Readmission

Any student who has been expelled will be allowed to make application for readmission at any time in accordance with Charter School enrollment and lottery policy and procedure. (See also **Readmission Application Process and Re-engagement**, below)

Expulsion: Reporting

Principals will report all long-term suspensions and the reasons therefor to the school principals or designee within twenty-four (24) hours after the imposing the expulsion.

Expulsion: Petition for extension of expulsion

The principal or designee may petition the school board for authorization to exceed the length of one academic term for a student's expulsion when warranted because of a perceived risk to public health and safety. The petition may be submitted any time after final imposition of the expulsion and prior to the end of the expulsion. The petition will include:

- A detailed description of the student's misconduct, the school rules that were violated, and the public health or safety concerns of the Charter School;
- A detailed description of the student's academic, attendance and discipline history, if any;
- A description of the lesser forms of corrective action that were considered and the reasons why they were rejected;
- A description of all alternative learning experiences, vocational programs and/or other educational services that may be available to the student;
- The proposed extended length of the expulsion;
- Identification of special education services or accommodations pursuant to Section 504 of the Rehabilitation Act of 1973, if appropriate; and
- A proposed date for the re-engagement meeting.

A copy of the petition will be delivered in person or by certified mail to the student and their parents/guardians in a language they can understand, if other than English, if feasible. The student and/or parents/guardians may submit a written or oral response to the petition within ten (10) school business days of receipt of the petition.

Within eleven (11) school business days, but no later than twenty (20) school business days from delivery of the petition to the student and parent/guardians, the school principals will issue a written decision granting or denying the petition. The school principals, in their discretion, may grant the petition if evidence exists that if a student was to return at or before one calendar year, they would pose a risk to public health or safety. The written decision will include a description of rights and procedures for appeal.

The student and/or parents/guardians may appeal the decision within ten (10) school business days of receipt of the decision to the school board.

The Charter School will report the number of petitions submitted, approved, and denied to the office of the school principals of public instruction annually.

Board option to delegate authority to hear appeals for long-term suspension and expulsion

The board may delegate its authority to hear and decide long-term suspension and expulsion appeals to a charter school disciplinary appeal council established by the board. Members of such councils will be appointed by the board for fixed terms and shall consist of no less than three persons. If such a council is established, the student and/or their parents/guardians have the right to appeal the hearing officer decision to the board or the disciplinary appeal council.

Appeal process for long-term suspension and expulsion

If a timely notice of appeal is received, the long-term suspension or expulsion may be imposed during the appeal period if:

- The long-term suspension or **non-emergency** expulsion is imposed for no more than ten (10) consecutive days or until the appeal is decided, whichever is the shortest period.
- Any days that the student is suspended or expelled before the appeal is decided are applied to the term of suspension or expulsion and will not limit or extend the term of the suspension or extend the term of suspension or expulsion; and
- A suspended student who returns to school before the appeal is decided will be provided the opportunity upon return to make up assignments and tests missed by reason of suspension if:
 - Such assignments or tests have a substantial effect on the student's semester or trimester grade or grades; OR
 - Failure to complete such assignment or tests would result in denial of course credit.

The board will schedule and hold a meeting to informally review the matter within ten (10) school business days from receipt of such appeal. The purpose of the meeting will be to confer with the parties in order to decide upon the most appropriate means of handling the appeal. At that time the student, parent/guardian, and/or counsel will be given the right to be heard and will be granted the opportunity to present such witnesses and testimony as the board deems reasonable.

Prior to adjournment, the board will agree to one of the following procedures:

- Study the hearing record or other materials submitted and record its findings within ten (10) school business days; OR
- Schedule and hold a special meeting to hear further arguments on the case and record its findings within fifteen (15) school business days; OR
- Hear and try the case de novo before the board within ten (10) school business days.

Any decision by the board to impose or to affirm, reverse or modify the imposition of suspension or expulsion upon a student will be made only by:

- Those board members who have heard or read the evidence;
- Those board members who have not acted as a witness in the matter; AND
- A majority vote at a meeting at which a quorum of the board is present.

Within thirty (30) days of receipt of the board's final decision, any parent and student desiring to appeal any action upon the part of the board regarding the suspension or expulsion may serve a notice of appeal upon the board and file such notice with the Superior Court Clerk of the County.

Readmission Application Process

Any student who has been suspended or expelled will be allowed to make application for readmission at any time. If a student desires to be readmitted to the school from which the student has been suspended/expelled, the student will submit a written application to the principal, who will recommend admission or non-admission. If a student wishes admission to another school, the student will submit the written application to the school principals. The application will include:

- Reasons the student wants to return and why the request should be considered;
- Evidence which supports the request; AND
- A supporting statement from the parent or others who may have assisted the student.

The school principals will advise the student and parent/guardian of the decision within seven (7) school days of the receipt of such application

Re-engagement Meeting and Plan

For any student who has been subjected to a long-term suspension or expulsion, the Charter School will convene a re-engagement meeting with the student and their parent(s)/guardian(s) to discuss a plan to re-engage the student. The re-engagement meeting does not replace an appeal hearing to challenge the suspension or expulsion, nor does it replace a petition for readmission. Before convening a re-engagement meeting, the Charter School will communicate with the student and parents to schedule the meeting time and location.

The re-engagement meeting must occur:

- Within twenty (20) calendar days of the start of the student's long-term suspension or expulsion, but no later than five (5) calendar days before the student's return to school; or
- As soon as reasonably possible, if the student or parents request a prompt re-engagement meeting.

The Charter School will collaborate with the student and parents to develop a culturally sensitive and culturally responsive re-engagement plan tailored to the student's individual circumstances to support the student in successfully returning to school.

In developing a re-engagement plan the Charter School must consider:

- The nature and circumstances of the incident that led to the student's suspension or expulsion;
- As appropriate, students' cultural histories and contexts, family cultural norms and values, community resources, and community and parent outreach;
- Shortening the length of time that the student is suspended or expelled;

- Providing academic and nonacademic supports that aid in the student's academic success and keep the student engaged and on track to graduate; and
- Supporting the student parents, or school personnel in taking action to remedy the circumstances that resulted in the suspension or expulsion and preventing similar circumstances from recurring.

The Charter School must document the re-engagement plan and provide a copy of the plan to the student and parents. The Charter School must ensure that both the re-engagement meeting and the re-engagement plan are in a language the student and parents understand, which may require language assistance for students and parents with limited English proficiency under Title VI of the Civil Rights Act of 1964.

Behavior Agreements

The Charter School authorizes staff to enter into behavior agreements with students and parents in response to behavioral violations, including agreements to reduce the length of a suspension conditioned on the participation in treatment services, agreements in lieu of suspension or expulsion, or agreements holding a suspension or expulsion in abeyance.

A behavior agreement does not waive a student's opportunity to participate in a re-engagement meeting under WAC 392-400-710, or waive the opportunity to receive educational services as provided under WAC 392-400-610. The duration of a behavior agreement must not exceed the length of an academic term. The Charter School is not precluded from administering discipline for behavioral violations that occur after the Charter School enters into an agreement with the student and parents.

The Charter School must ensure that any behavior agreement is provided in a language the student and parents understand, which may require language assistance for students and parents with limited English proficiency under Title VI of the Civil Rights Act of 1964.

Exceptions for protecting victims

The Charter School may preclude a student from returning to the student's regular educational setting following the end date of a suspension or expulsion to protect victims of certain offenses as follows:

- **Teacher victim:** A student committing an offense under RCW [28A.600.460](#)(2), when the activity is directed toward the teacher, shall not be assigned to that teacher's classroom for the duration of the student's attendance at that school or any other school where the teacher is assigned;
- **Student victim:** A student who commits an offense under RCW [28A.600.460](#) (3), when directed toward another student, may be removed from the classroom of the victim for the duration of the student's attendance at that school or any other school where the victim is enrolled.

c. Rights of Students with Disabilities

Catalyst will follow the procedural safeguards found in the Office of the Superintendent's Notice of Special Education Procedural Safeguards for Students and Their Families.

Discipline Procedures for Students Eligible for Special Education

There are special education protections afforded to a child when the child is disciplined. These protections are in addition to discipline procedures that apply to all students. These protections also apply to students who have not yet been found eligible for special education if the Charter School should have known that the student would be eligible.

Authority of School Personnel

School personnel may consider any unique circumstances on a case-by-case basis, when determining whether a change of placement, made in accordance with the following requirements related to discipline, is appropriate for a child who violates a school code of student conduct.

General

To the extent that they also take such action for students without disabilities, school principals may, for not more than **ten (10) school days** in a row, remove a child from their current placement to an appropriate interim alternative educational setting, another setting, or suspend a child, when the child violates a code of student conduct. School personnel may also impose additional removals of a child of not more than **ten (10) school days** in a row in that same school year for separate incidents of misconduct; as long as those removals do not constitute a change of placement (see **Change of Placement Because of Disciplinary Removals** for the definition, below).

Once a child has been removed from their current placement for a total of **ten (10) school days** in the same school year, the Charter School must, during any subsequent days of removal in that school year, provide services to the extent required below under the sub-heading **Services**.

Additional Authority

If the behavior that violated the student code of conduct was not a manifestation of a child's disability (see **Manifestation Determination**, below) and the disciplinary change of placement would exceed **ten (10) school days** in a row, school personnel may apply the disciplinary procedures to a child in the same manner and for the same duration as it would to students without disabilities, except that the school must provide services to a child as described below under **Services**. A child's IEP team determines the interim alternative educational setting for the services to a child in this situation.

Services

The services that must be provided to a child, when the child has been removed from their current placement may be provided in an interim alternative educational setting.

A charter school is not required to provide services to a child if the child has been removed from their current placement for **ten (10) school days or less** in that school year, unless it provides services to students without disabilities who have been similarly removed.

If a child has been removed from their current placement for **more than ten (10) school days** a child must:

- Continue to receive educational services, so as to enable a child to continue to participate in the general education curriculum, although in another setting, and to progress toward meeting the goals set out in the child's IEP; **and**,
- If a child's behavior was not a manifestation of their disability, the child must receive, as appropriate, a functional behavioral assessment, and behavioral intervention services and

modifications, which are designed to address the behavior violation so that it does not happen again.

After a child has been removed from their current placement for **ten (10) school days** in that same school year, and **if** the current removal is for **ten (10) school days** in a row or less, **and**, if the removal is not determined to be a change of placement (see definition below), **then**, school personnel, in consultation with at least one of a child's teachers, will determine the extent to which services are needed to enable a child to continue to participate in the general education curriculum, although in another setting, and to progress toward meeting the goals set out in a child's IEP.

If the removal is a change of placement (see definition below), a child's IEP team determines the appropriate services to enable a child to continue to participate in the general education curriculum, although in another setting, and to progress toward meeting the goals set out in the child's IEP.

Change of Placement Because of Disciplinary Removals

A child's removal from their current educational placement is a **Change of Placement** if:

- The removal is for more than ten (10) school days in a row; **or**
- a child has been subjected to a series of removals that constitute a pattern because:
 - The series of removals total more than ten (10) school days in a school year;
 - A child's behavior is substantially similar to their behavior in previous incidents that resulted in the series of removals; **and**
 - There are additional factors considered such as the length of each removal, the total amount of time a child has been removed, and the proximity of the removals to one another.

The Charter School determines whether a pattern of removals constitutes a change of placement on a case-by-case basis and, if challenged by the parent, is subject to review through due process and judicial proceedings.

Notification

On the date the Charter School makes the decision to make a removal that is a change of placement for a child because of a violation of a code of student conduct, it must notify the parent of that decision, and provide the parent with a procedural safeguards notice.

Manifestation Determination

Within **ten (10) school days** of any decision to change the placement (see **Change of Placement Because of Disciplinary Removals**) of a child because of a violation of a code of student conduct, the Charter School, and relevant members of the IEP team, determined by the parent and the charter school, must review all relevant information in a child's file, including their IEP, any teacher observations, and any relevant information provided by the parent to determine:

- If the conduct in question was caused by, or had a direct and substantial relationship to, a child's disability; **or**
- If the conduct in question was the direct result of the charter school's failure to implement a child's IEP.

If the relevant members of a child's IEP team, including the parent, determine that either of those conditions was met, the conduct must be determined to be a manifestation of a child's disability.

If the group described above determines that the conduct in question was the direct result of the Charter School's failure to implement the IEP, the Charter School must take immediate action to remedy those deficiencies.

Determination that Behavior Was a Manifestation of the Student's Disability

When this group, that includes the parent, determines that the conduct was a manifestation of a child's disability, the IEP team must either:

- Conduct a functional behavioral assessment, unless the Charter School had conducted a functional behavioral assessment before the behavior that resulted in the change of placement occurred, and implement a behavioral intervention plan for a child; **or**
- If a behavioral intervention plan already has been developed, review the behavioral intervention plan, and modify it, as necessary, to address a child's behavior.

Except as described below under the sub-heading **Special Circumstances**, the Charter School must return a child to the placement from which the child was removed, unless the parent and the Charter School agree to a change of placement as part of the modification of the behavioral intervention plan.

Special Circumstances

School personnel may remove a child to an interim alternative educational setting (determined by the student's IEP team), regardless of whether or not a child's behavior was a manifestation of the child's disability, for up to 45 school days, if he or she:

- Carries a weapon (see the definition below) to school or has a weapon at school, on school premises, or at a school function under the jurisdiction of a charter school;
- Knowingly has or uses illegal drugs (see the definition below), or sells or solicits the sale of a controlled substance, (see the definition below), while at school, on school premises, or at a school function under the jurisdiction of a charter school; **or**
- Has inflicted serious bodily injury (see the definition below) upon another person while at school, on school premises, or at a school function under the jurisdiction of a charter school.

Definitions

- Controlled substance means a drug or other substance identified under schedules I, II, III, IV, or V in section 202(c) of the Controlled Substances Act (21 U.S.C. 812(c)).
- Illegal drug means a controlled substance; but does not include a controlled substance that is legally possessed or used under the supervision of a licensed health-care professional or that is legally possessed or used under any other authority under that Act or under any other provision of Federal law.
- Serious bodily injury means a bodily injury that involves: a substantial risk of death; extreme physical pain; protracted and obvious disfigurement; or protracted loss or impairment of the function of a bodily member, organ or faculty.
- Weapon means a weapon, device, instrument, material, or substance, animate or inanimate, that is used for, or is readily capable of, causing death or serious bodily injury, except that such term does not include a pocket knife with a blade of less than two and one-half inches in length.

Determination of Setting

The IEP team must determine the interim alternative educational setting for removals that are **Changes of Placement**, and removals under the headings **Additional Authority** and **Special Circumstances**, above.

Due Process Hearing Procedures for Discipline

The parent may file a due process hearing request if the parent disagree with:

- Any decision regarding placement made under these discipline provisions; **or**
- The manifestation determination described above.

The Charter School may file a due process hearing request if it believes that maintaining the current placement of a child is substantially likely to result in injury to a child or to others.

See the **Due Process Hearing Procedures** section for more information on filing a due process hearing request.

Authority of Administrative Law Judge (ALJ)

An ALJ must conduct the due process hearing and make a decision. The ALJ may:

- Return a child to the placement from which the child was removed if the ALJ determines that the removal was a violation of the requirements described under the heading **Authority of School Personnel**, or that a child's behavior was a manifestation of their disability; **or**
- Order a change of placement of a child to an appropriate interim alternative educational setting, for not more than 45 school days if the ALJ determines that maintaining a child's current placement is substantially likely to result in injury to a child or to others.

These hearing procedures may be repeated if the Charter School believes that returning a child to the original placement is substantially likely to result in injury to a child or to others.

Whenever the parent or the Charter School requests a due process hearing, the request must meet the requirements described under the headings **Due Process Hearing Request Procedures** and **Due Process Hearings**, except as follows:

- The due process hearing is expedited and must occur within **twenty (20)** school days of the date the hearing is requested. The ALJ must issue a decision within **ten (10)** school days after the hearing.
- Unless the parent and the charter school agree in writing to waive the meeting, or agree to use mediation, a resolution meeting must occur within **seven (7)** calendar days of the date the parent filed the due process hearing request with OSPI and the charter school. The hearing may proceed unless the matter has been resolved to the satisfaction of both parties within **fifteen (15)** calendar days of receipt of the due process hearing request.
- OSPI has established a **two (2)** business day timeline for production of evidence when the parent or the charter school files an expedited due process hearing request (for discipline).

The parent or the Charter School may initiate a civil action, contesting the decision in an expedited due process hearing the same way as they contest decisions in non-disciplinary special education due process hearings (see **Appeals**, above).

Placement During Due Process Expedited Hearings

When the parent or the Charter School has filed a due process hearing request related to disciplinary matters, unless the parent and the charter school agree to a different arrangement, a child must remain in the interim alternative educational setting pending the decision of the hearing officer, or until the expiration of the time period of removal, described under the heading **Authority of School Personnel**, whichever occurs first.

Protections for Students Not Yet Eligible for Special Education and Related Services

General

If a child has not been determined eligible for special education and related services, and violates a code of student conduct, the parent may assert a child's procedural protections if it is determined that the Charter School had knowledge that a child should have been evaluated and determined eligible for special education services before the behavior that brought about the disciplinary action occurred.

Basis of Knowledge for Disciplinary Matters

A charter school must be deemed to have knowledge that a child is eligible for special education if, before the behavior that brought about the disciplinary action occurred:

- The parent expressed concern in writing that a child is in need of special education and related services to supervisory or administrative personnel of the charter school, or to a teacher of a child;
- The parent requested an evaluation related to eligibility for special education and related services under Part B of IDEA; **or**
- a child's teacher, or other charter school personnel, expressed specific concerns about a pattern of behavior demonstrated by a child directly to the charter school's director of special education, or to other supervisory personnel of the charter school.

Exception

A charter school would not be deemed to have such knowledge if:

- the parent did not allow an evaluation of a child or the parent refused special education services; **or**
- a child has been evaluated and determined to not be eligible for special education services.

Conditions That Apply if There is No Basis of Knowledge

If a charter school does not have knowledge that a child is eligible for special education, prior to taking disciplinary measures against a child, as described above under the sub-headings **Basis of Knowledge for Disciplinary Matters** and **Exception**, a child may be subjected to the disciplinary measures that are applied to students without disabilities who engaged in the same types of behaviors.

However, if the parent or the Charter School requests an evaluation of a child during the time period in which the child is subjected to disciplinary measures, the evaluation must be conducted in an expedited manner.

Until the evaluation is completed, a child remains in the educational placement determined by school authorities, which can include suspension or expulsion without educational services.

If a child is determined to be eligible for special education services, taking into consideration information from the evaluation conducted by the Charter School, and information provided by the parent, the Charter School must provide special education and related services to a child and follow the disciplinary requirements described above.

d. Addressing Discipline Disproportionality

Catalyst will annually collect and review data on disciplinary actions taken against students within each school. The data will be disaggregated into subgroups as required by RCW 28A.300.042, including race, ethnicity, and gender, and will include students protected by the Individuals with Disabilities Education Act and Section 504 of the Rehabilitation Act of 1973. The review must include short-term suspensions, long-term suspensions, and expulsions. In reviewing the data, the Catalyst will determine whether it has disciplined a substantially disproportionate number of students within any of the disaggregated

categories. If Catalyst finds disproportionality, Catalyst will take action to ensure that it is not the result of discrimination. This action includes teacher professional development about bias, classroom management, and coaching for any teachers for whom data shows are disciplining at disproportionate rates.

e. See previous sections for information about procedures for due process when a student is suspended or expelled, as a result of a code of conduct violation, including the appeal process and service provision.



Catalyst: Bremerton

Section 13: Attachment 9

Contents:

- Proposed School Leader Resumes
 - Amanda Gardner, Chief Executive Officer, Co-Principal
 - Tatiana Epanchin-Troyan, Chief Academic Officer, Co-Principal
- Letter of Support from Washington State Charter Schools Association

Amanda Gardner

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Education and Certification	Harvard University Graduate School of Education, Cambridge, MA	<i>June, 2004</i>
	Master's in Education, School Leadership	
	Office of Superintendent of Public Instruction, Olympia, WA	<i>July, 2016</i>
	<ul style="list-style-type: none">• Residency Administrator Certificate, Principal	
	Massachusetts Department of Education Malden, MA	<i>June, 2004</i>
	<ul style="list-style-type: none">• Professional Administrative License, Grades PreK-5• Professional Administrative License; Grades 6-8• ESL Teaching License; Grades 6-8	
	Louisiana State University/The New Teacher Project Baton Rouge, LA	<i>May 2002</i>
	<ul style="list-style-type: none">• Completed coursework and portfolio required for teacher preparation program; received middle school science teaching license	
	Tulane University Newcomb College, New Orleans, LA	<i>May, 2000</i>
Bachelor of Arts, Anthropology		

Experience	Innovate Public Schools, San Jose, CA	<i>August 2014 to present</i>
	Vice President, Schools <ul style="list-style-type: none">• Founding member of the leadership team of an education reform nonprofit started as a supporting organization of the Silicon Valley Community Foundation• Developed and lead a year-long leadership development program, the Start-Up Schools Fellowship, for charter and district leaders who are preparing to start or restart new, high performing schools for low income students and students of color• Designed and launched one of the Bay Area's only school incubators, the Charter School Entrepreneur-in-Residence program, aimed at supporting the research, development, and launch of innovative new school models• Manage the overall strategic planning and development of Innovate's Schools team, including managing a team of 5 and maintaining program budget• Provide 1:1 leadership coaching for Fellows, including school principals, chief academic officers, and directors of schools• Assist with the strategic planning and development of organizational culture for Innovate Public Schools	
	UP Academy Charter School of Boston South Boston, MA	<i>July 2011-July 2013</i>
	Founding Principal <ul style="list-style-type: none">• Founding school leader of Massachusetts' first school restart within the Boston Public Schools• Doubled Math MCAS proficiency and nearly doubled ELA MCAS proficiency rates in founding year; school has continued to make dramatic gains in achievement in subsequent years• Median Student Growth Percentile (SGP) in Mathematics was highest in state; median SGP for English was highest for all Boston Public Schools and has consistently been at or near the top of state since the school's founding• Directly managed a team of 7 school leaders and staff and provided instructional leadership and strategy support for a staff of 60 school leaders and teachers• Successfully managed relationships with the Massachusetts Department of Elementary and Secondary Education, the Boston Public Schools and the school's home office, UP Education Network• Acted as a principal mentor for principals in residence and provided supplemental professional development for leaders in residence• Successes of the school's founding year allowed UP Education Network to found additional turnaround schools in Boston, Lawrence and Springfield, Massachusetts	

UP Education Network South *Boston, MA*

February-June, 2011

School Leader Consultant

- Managed the school's founding leadership team
- Oversaw recruitment efforts for a founding team of 57 individuals. Selectivity rate of successful applicants was less than 1%
- Oversaw implementation of the school's charter application and opening procedures with the Massachusetts Department of Education
- Create school culture, curricular, and operating systems and procedures for a school serving nearly 500 students

Boston Preparatory Charter Public School *Boston, MA*

March 2004-June 2011

Co-Founder and Founding Principal

- Student achievement rates were consistently above state averages in all grade levels and all content areas. School's proficiency rates on standardized tests were consistently well above 80% and were near 100% for high school students
- 100% of the school's graduating seniors accepted to 4 year colleges and universities; student college persistence rate is over 85% for all graduates
- Provided day to day instructional and cultural leadership for more than 300 students in grades 6-12
- Recruited, supported and evaluated an instructional staff of 50 teachers and school leaders.
- Designed, developed, and facilitated schoolwide, departmental, and individualized professional development for staff
- Managed all federal and state compliance and grants

Northeast High School *Pride, LA*

August 2000-May 2003

Math and Science Teacher

- Teach for America corps member placed at a middle and high school in rural Louisiana
- Taught middle and high school science and math including accelerated courses for some students
- Over 80% of students made significant academic gains as measured by multiple indicators including state mandated standardized science test

**Awards and
Recognition**

Featured in the Following Publications

- "Storming and Norming: Creating a Shared Mindset Among Staff," XQ Super Schools Project Nuts and Bolts website, to be published, 2017.
- ["Keys to Radical Classroom Change,"](#) EdWeek, written by Amanda Gardner, 2013.
- *Character Compass: How Powerful School Culture Can Point Students Toward Success*, written by Scott Seider, 2012.
- ["Failing South Boston School Makes a Turnaround,"](#) The Boston Globe, written by Yvonne Abraham, 2012.
- [Boston's Embattled Superintendent Begins School Year Chastened But Determined;](#) National Public Radio, 2012.
- "Rejuvenated School Helps Kids Reach New Heights," The Boston Herald, written by Jessica Heslam.
- ["Life Lessons from the Philosophers,"](#) Educational Leadership, written by Scott Seider and Sarah Novick, 2011.
- **Expanded Learning Time: Making Every Minute Matter at Boston Preparatory Charter Public School and Other Charter Schools in Massachusetts**, written by Piel Hollingsworth and Kim Wechtenhiser, 2009.

2009 Boston Preparatory Charter Public School recognized as a **Gold Gain school** by the **Effective Practice Incentive Community (EPIC)**. EPIC ranked BPCPS as one of top 5 public charter schools in the nation.

2002 Selected as the Northeast High School Teacher of the Year

Related Experience

2013-2016 Provide ongoing leadership development support and mentoring to a variety of senior level education leaders, principals, assistant principals, and deans at high performing charter organizations including the UP Education Network (Boston, MA), New Orleans College Prep (New Orleans, LA), KIPP MA (Boston, MA) and Kauffman Schools (Kansas City, MO)

2015 Selected to present a series of workshops at the upcoming state conference for the California Charter School Association. The series, "Common Sense School Design: 3 Super Levers for Academic Excellence," will teach start-up charter school leaders best practices related to instructional rigor and coaching, developing and maintaining a positive school culture, and parent leadership and engagement

2014 Member of the Board of Trustees, Cornerstone Academy Preparatory School, San Jose, CA

2013 to present Provide 1:1 leadership coaching and mentorship to current principals and assistant principals of the UP Education Network to ensure they meet licensure requirements and are adequately prepared to lead schools of excellence

2010 Guest lecturer at Boston University's School of Education on building effective classroom culture and instructional practice

2009 to 2013 Participated in charter prospectus review and charter application review for the Massachusetts Department of Education

2009 Coordinated a grant application and program spotlighting effective practices in charter public schools, "Expanded Learning Time: Making Every Minute Matter." Worked with the Massachusetts Charter School Association to organize study tours around expanded learning time in several charter public schools.

2008 Participated in a panel at the National Charter School Conference in New Orleans, Louisiana to speak on a brief, "African American Achievement in Public Charter Schools." The brief was commissioned by the National Alliance of Public Charter Schools.

2004 Completed 500+ hour school leadership internship at the Philbrick School in the Boston Public Schools

Other Workshops Presented

- *Support Structures at Boston Preparatory Charter Public School*, presented at the annual conference of the Massachusetts Charter Public School Association.
 - *Preventative Discipline and Creating A Positive Classroom Culture*, presented at Brandies University.
 - *Engaging Students Through Inquiry Based Learning*, presented at the Teach Baton Rouge Summer Institute
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Tatiana Epanchin-Troyan
tepanchin@gmail.com
510.388.7925

EDUCATION

MS.Ed. California State University, East Bay / New Leaders for New Schools
Educational Leadership
M.S.W. California State University, Sacramento
Community Organizing, Planning, Administration
B.A. University of California, Santa Barbara
Sociology

PROFESSIONAL EXPERIENCE

2016-
Present ***Partner and Program Founder: School Leader Lab***
Design, develop and deliver programming to school leaders across the school site leadership trajectory: teacher leader through principal manager to build leadership capacity and to create retention strategy across the DC charter sector

- Build and author business and content program from creation through launch
- Design and develop the leadership program as it aligns to instructional leadership in partnership with Relay GSE
- Construct and facilitate Learning Labs for deep and authentic practice opportunities for school leaders
- Coach school leaders in instructional and adaptive leadership challenges bi-weekly
- Own and codify learning for the organization as pertains to Diversity, Equity and Inclusiveness

2014-2015 ***Senior Vice President: Regional Operations, Teach For America***
Provided critical strategic and operations support on the fiscal, academic, teaching, and leadership outcomes of 8 regions across the United States to ensure that educational inequities are addressed

- Oversaw and approved development plans and fiscal year budgeting for the regions
- Managed and coached executive directors and their regional leadership teams on culture, financials, adaptive leadership, data-driven decision making, action planning, work stream execution
- Built relationships with local boards, community members, and TFA Alumni and Corps Members
- Synthesized, analyzed, and managed data from multiple national teams ; collaborated with national team members in support of regions
- Participated on TFA's operating committee to develop the strategic plan for the organization

2010-2014 ***Superintendent: Bay Area, Aspire Public Schools***

Responsible for the academic, logistic, and fiscal results of 10 schools in Oakland and East Palo Alto

- Member of Aspire Public Schools' Senior Leadership Team
- Created and disseminated professional development centered on equity for Senior Leadership Team, Principals, Directors, Lead Teachers and 37 schools. As Aspire's Equity Priority Owner, these efforts promoted and increased the retention of a diverse and culturally competent work force to better meet the needs of our diverse student body, and to more competently serve in the areas we have presence. Modeled and promoted using an equity lens when considering data, patterns, issues of access and equity for students.
- Selected, developed and evaluated 13 principals, 2-4 resident principals; developed and supported 45-50 lead teachers in their roles as instructional leaders and site managers to ensure high quality implementation of instruction and service.
- Determined cultural, staffing, financial and academic priorities for the 10 school regions and managed the regional office team to achieve deliverables.
- Managed the opening of new schools in the region including all operations, from charter petition to first day (procurement, hiring, contracts, student recruitment, and principal capacity building).
- Cultivated and maintained relationships with local district officials and community leaders to further Aspire and individual school goals within four charter authorizing districts including collaborations on literacy, best practices and teacher effectiveness.
- Collaborated with University of California faculty to provide strategic leadership to Cal Prep.
- Defended existing and new charter petitions through renewal/approval process at district and county levels: 100% success rate: 7 renewals; 2 new charters

2009-2010

Founding Principal: *Aspire ERES Academy, Aspire Public Schools*

Principal and instructional leader to ensure academic growth of 220 students grades K- 8 (100% students of color, 95% free/reduced lunch, 90% ELL)

- Academic Performance Index Point growth from 2009-2010: 101 points (state average in same time period: 13 points)
- Projected resource needs and hired 100% of staff and faculty for schools in partnership with families and the community; 90% of staff and faculty retained through year two.
- Planned and executed all professional development for staff and teaching faculty.
- Established school wide systems and traditions for culture including that of student, faculty, and family; 93% of families stated that they would give the school an A or B and 95% of families stated that they would recommend the school to family or friends.
- Partnered with departments within Aspire Public Schools, Dolores Huerta Learning Academy, and Oakland Unified School District to ensure smooth transition from the existing charter school to a new charter school.
- Fostered the practice of using various data to drive instruction and create a culture of continuous improvement.

2005-2009

Principal: *Aspire Monarch Academy, Aspire Public Schools*

Principal and instructional leader at an Aspire Public School, located in East Oakland,

serving 352 students (100% students of color, 95% free/reduced lunch, 80% ELL)

- Academic Performance Index Point growth from 2005 – 2008: 150 points (state average in same time period: 46 points)
- Served as Mentor Principal for New Leaders for New Schools, 2008-2009
- National Title 1 award recipient: strongest gains in closing the achievement gap in the state of California, 2007.
- Planned and led all professional development for staff and teaching faculty
- Developed and implemented interim assessments to ensure constant improvement
- Designed and implemented systems to use data to drive instruction and a cycle of continuous improvement in the school.

2004-2005 ***New Leaders for New Schools Fellow and Principal Resident: Aspire Lionel Wilson College Preparatory Academy, Aspire Public Schools***

Administrator and instructional leader at Wilson Prep, located in East Oakland, serving approximately 450 Latino and African American students in grades 6 – 12

- Observed and coached teachers toward mastery across the grades in all areas of curriculum
- Created and implemented professional development for high school literacy
- Managed data collection and analysis for various metrics to inform improvement efforts developed in collaboration with staff, students, and families
- Led math team and fulfilled lead educator responsibilities for team of mathematics educators
- Modeled teaching strategies and Aspire Guidelines for teachers in their classes
- Communicated with students and families about policy, college, discipline, and social pragmatics
- Coordinated and scheduled school-wide testing, Saturday Schools, Exhibitions, 8th grade promotion, celebrations, and school events

2001-2004 ***Middle School Teacher and Founding Lead Teacher: Aspire Monarch Academy and Lionel Wilson College Preparatory Academy, Aspire Public Schools***

Founding Lead Teacher and model classroom in a new Aspire Public School, Lionel Wilson College Preparatory Academy serving students grades 6 – 12

- Facilitated the collaboration of the middle school Humanities teachers
- Observed and coached teachers in middle school Humanities
- Wrote policy, school-wide rubrics, and family communication for the school
- Developed school-wide exhibitions protocols and implementation
- Taught 6th & 7th grade Humanities, Challenge class, Entrepreneurship and Advisory
- Modeled lessons providing examples of differentiation and EL strategy

1997-2001 ***Family Preservation Therapist: Families First, Inc.***

Worked on intensive family preservation cases and provided in-home services to

families involved with Probation and Social Services in Contra Costa County

- Provided in-home services to families
- Supervised support counselors assigned to cases
- Managed referrals of children and their families to non-profit agencies throughout Contra Costa and Alameda Counties
- Created and implemented a variety of safety plans for members of client families
- Provided crisis management to children and families, conducted needs assessment
- Advocated for children and families in court, schools, and therapeutic institutions and oversaw reunification and visitation
- Authored reports for Contra Costa County court and probation systems

1996- 1997 ***Coordinator: October 9th Organizing Committee***

Coordinated activities and secured speakers, including Howard Zinn and Ronald Takaki, for a series of conferences, information sessions, and rallies created to stop Proposition 209 and to support continuation of Affirmative Action in California

- Organized and managed a series of conferences around Affirmative Action, gender, and diversity on the CSUS campus including set-up and maintenance of publicity
- Created and managed database of event participants and public relations activities
- Co-authored a procedure manual for organizing on the CSU campus

1993–1995 ***Teach for America Corps Member: Middle School Teacher (English, History, Special Education 6th, 7th, 8th grades): Orleans Parish and Jefferson Parish, LA***

CREDENTIALS

Residency Administrator Principal WA	527570F
Residency Elementary Teacher WA	527570F
Administrative Services CLEAR Credential CA	140060856
Multiple Subject CLEAR Teaching Credential CA	123206484

CONTRACTS and BOARD MEMBERSHIP

1/2017-present	<p><i>Impact Public Schools- Founding Board Member</i></p> <ul style="list-style-type: none"> • Advise and provide charter, school leadership, and academic program expertise
10/2016-5/2017	<p><i>Educate 78- Leadership Coach</i></p> <ul style="list-style-type: none"> • Mentor and coach a School Design Fellow
8/2014 – 6/2017	<p><i>University of Washington, Danforth School of Education Advocate</i></p> <ul style="list-style-type: none"> • Mentor and advocate for principal interns as they earn School Leadership Credentials
3/2013-Present	<p><i>One Purpose Charter School- Advisory Board Member</i></p> <ul style="list-style-type: none"> • Consulted on educational program for charter petition as it is authored
3/2013-6/2014	<p><i>Startup:Education- Independent Contractor</i></p> <ul style="list-style-type: none"> • Advised and provided expertise around the charter landscape in the Bay Area – and educational equity, school operation and impact • Shared expertise on vulnerable children / foster care, curriculum and instruction, political landscape of starting a charter, etc.
8/2010-6/2011	<p><i>School Leaders Network- Facilitator</i></p> <ul style="list-style-type: none"> • Facilitated a School Leaders Network in Oakland, CA for principals serving students in Oakland Unified School District and in local charter schools

MEMBERSHIPS, AWARDS, PUBLICATIONS and PRESENTATIONS

2016-17 2015	<p>Relay Graduate School of Education: Leverage Leadership Institute Fellow</p> <p>Darwish, Elise and Epanchin, Tatiana: Achieving College Dreams: The Face of Opportunity; Oxford University Press (2016) Chapter 16 From Parallel Tracks to Intertwined Efforts.</p>
2014	<p>Aspen Institute Faculty Contributor-</p> <p>Principled Leadership: Understanding the Work and Impact of Effective Public School Principals</p>
2009	<p>Rainwater Leadership Alliance-</p> <p>A convergence of thought leaders examining principal preparation programs and the roles they play in reforming education across the country</p>
2009	<p>EPIC Award</p> <p>Effective Practice Incentive Community Silver Gains grant recipient</p>
2008	<p>ASCD Whole Child Pod Cast Participant-</p> <p>“How Urban Schools Work Beyond the Boundaries of Social and Economic Conditions”</p>
2008	<p>EPIC Award</p> <p>Effective Practice Incentive Community Gold Gains grant recipient</p>
2008	<p>NAESP: Diverse Learning Communities Today-</p> <p>“Monarch Academy, an Urban School Where All Students Achieve”</p>
2007	<p>National Title I Award</p>

2007 Making the most progress in the state to decrease the achievement gap in California
Teach For America Alumni Summit Presenter-
“Leading the Bay Area's Best Schools: Lessons Learned From Some of the Top Performing Schools that Serve Low-income and Minority Children”
2007 **Title I National Conference Presenter-**
“Distinguished School Leader Panel: Principal Leadership”

Spanish, *Proficient Speaker*



Washington State Charter Schools Association

210 S Hudson St, Suite 324 | Seattle, WA 98134

206.832.8505 | info@wacharters.org

March 1, 2019

Ms. Cindi Williams, Chairperson
Washington State Charter School Commission
P.O. Box 40996
Olympia, WA 98504-0996

Dear Chair Williams and Members of the Commission:

On behalf of the Washington State Charter Schools Association (WA Charters), I am writing to pledge my full support for **Catalyst Public Schools: Bremerton** and the leadership of Amanda Gardner and Tatiana Epanchin, two of our state's most innovative educators and promising charter school leaders. WA Charters is a statewide nonprofit organization that advocates for and supports the startup of high-quality charter public schools, with a focus on serving systemically underserved communities. Since July 2018, WA Charters has worked with Ms. Gardner and Ms. Epanchin through the School Leadership and Design Fellowship (SLDF), as they and their school design team have developed a proposal for a high-quality K-8th grade charter public school in Kitsap County.

The SLDF is a highly selective, year-long program (July 2018 – June 2019) in which talented leaders explore diverse educational models, visit high-performing schools, and conduct deep, authentic community engagement with stakeholders to understand a particular local context to inform the design of a school. Ms. Gardner and Ms. Epanchin were selected for the Fellowship based on their track record of successfully launching and operating opportunity gap-closing charter schools in Boston and California, their commitment to serving an “at-risk” student population, and their proposal for a community-responsive, innovative school model that aligns to state standards and will prepare students to be college and career-ready.

Guided by WA Charters' core values of Partnership, Community, Innovation, Excellence, and Diversity, Fellows are encouraged to build partnerships with community-based organizations and local school districts, conduct focus groups with community stakeholders to get input about their school model, imagine inclusive, rigorous school models that meet the needs of the whole child, build leadership teams that reflect the students and communities they will serve, set ambitious goals for the student outcomes they seek to achieve—and build excellent operational and academic systems to attain them.

In **Catalyst: Bremerton**, Amanda Gardner and Tatiana Epanchin offer a K-8 public school committed to diversity, equity, inclusion, and self-empowerment at every level—from racial affinity groups for its youngest students to foster positive identity development to classes for parents to build their leadership capacity and advocacy skills. Over the past year, Ms. Gardner, Ms. Epanchin, and their school design team have engaged student, parent, and community-based organizations in Bremerton to understand their needs and desires for a high-quality public elementary school option in a region of the state where there are currently no charter options. They have traveled to California, Colorado, and Tennessee to observe some of the country's highest-performing schools that are disseminating impactful social-emotional and instructional practices, and they have worked diligently to build a talented board that is committed to equity, educational excellence, and the critical governance responsibilities required of a founding charter school board.

On behalf of WA Charters, I have the utmost confidence in Ms. Gardner's and Ms. Epanchin's abilities to plan, launch, and operate a rigorous, inclusive school model that meets the needs of its community. WA Charters is committed to continuing to work with **Catalyst: Bremerton**, Amanda Gardner and Tatiana Epanchin, other members of its design team, as well as its board of directors throughout the start-up phase and beyond. The authorization of Ms. Gardner's and Ms. Epanchin's school is critical to realizing our vision for empowered communities with high-quality public schools for all students. I urge you to give the families and students of Kitsap County the option and opportunity to attend **Catalyst: Bremerton**.

Respectfully yours,

A handwritten signature in black ink, appearing to read 'Pat D'.

Patrick D'Amelio
CEO, WA Charters



Catalyst: Bremerton

Section 13: Attachment 10

Contents:

- Leadership Team Job Descriptions
 - Director of Finance and Operations
 - Office Manager
 - Community Engagement Coordinator



Director of Finance and Operations

About Catalyst Public Schools:

Catalyst Public Schools: Bremerton will serve 224 scholars from South Kitsap, Central Kitsap, and Bremerton beginning with grades K, one, five, and six in 2020. At Catalyst, we believe that it is every adult's job to cultivate the critical hope, optimism, and leadership required for scholars to envision and access the future of their dreams. We place **diversity, equity, and inclusion** at the center of all we do; provide **rigorous academics and dynamic supports** to our scholars; support them as they find their **purpose and passion** in life; and provide **world class staff development** to continuously improve.

Our Vision:

Catalyst: Bremerton's graduates build a strong understanding of themselves, envision the world in which they want to live, and develop the agency to access the future of their dreams. We consider equity first as we develop a network of schools that serves as a national model for how schools can be catalysts of positive community change when families, schools, and community come together to put the interests of scholars first.

Our Mission:

Catalyst: Bremerton supports our diverse scholars to live full lives and to succeed in college, career, and life. Catalyst scholars find their purpose and passion so that they can cultivate the critical hope, optimism, and leadership essential to be catalysts in their community and world.

Our Values:

Catalyst Public Schools' culture is rooted in **six core values**. At the center is **equity** around which we aim to exemplify **achievement, joy, wellness, courage, and leadership**. These values are the foundation upon which all aspects of Catalyst Public Schools are set.

The Opportunity:

Catalyst Public Schools is searching for a full time Director of Finance and Operations.

Catalyst Public Schools is a growing, mission-driven, nonprofit organization. To accommodate that growth, we are seeking our first Director of Finance and Operations to lead Catalyst's implementation of the business processes, systems, and procedures required to achieve our mission and goals. This position's primary responsibility is ensuring organizational effectiveness and sustainability by providing leadership for the organization's financial and operational functions.

The Director of Finance and Operations reports to the school co-founder/CEO and oversees Catalyst's financial and operational activities. In that capacity, the priority is to enhance and implement processes to support our expanding business activities, while ensuring excellence that is consistent with Catalyst's culture and values. The Director of Finance and Operations will play a key role translating financial and operational data into strategic insights that inform day-to-day tactical decisions and long-term planning.

Essential Duties and Responsibilities:

The Director of Finance and Operations will supervise all activities related to school finance and operations including managing the relationship with Catalyst's back-office support provider. The Director of Finance and Operations will also focus on these areas:

Leadership

- Discuss and provide input on top-level management decisions related to financial and operational concerns
- Develop and improve efficiency in business processes across the organization
- Participate in strategic planning, including serving as the lead on researching and selecting systems needed to support Catalyst's continuing growth
- Improve the definition, understanding and sustainability of the organization's business model
- Oversee the creation and understanding of appropriate organizational quality and performance metrics
- Mentor and develop staff using a supportive and collaborative approach aligned with Catalyst's mission and culture

Financial Management

- Maintain complete and accurate records of all financial aspects of Catalyst Public Schools
- Lead budgeting, financial modeling and cash flow-forecasting
- Review and approve financial reporting activities, including organizational revenue/expense and balance sheet reports, and development and monitoring of organizational and contract/grant budgets in order to communicate monthly and annual financial statements
- Engage Catalyst school leaders in developing and tracking their program budgets
- Attend and report at Board of Director meetings when needed
- Develop, update, and communicate fiscal policies and procedures, ensuring compliance and strong internal controls
- Oversee the audit process with Catalyst auditors and back-office service provider

Operational Management

- Manage external vendors for a variety of business and school services, including IT, transportation, food service, student health services, etc.
- Oversee technology and telecommunication systems and record retention;
- Manage Catalyst's human resource functions, including updating and maintaining Catalyst's Employee Handbook, operational policies, and procedures

- Ensure that Catalyst staff are informed of organizational operating procedures and work with the directors of Catalyst to ensure that staff consistently implement procedures effectively and efficiently

Qualifications:

- Minimum BS/BA degree in finance, accounting, business administration, economics or a related field
- MBA Preferred
- 3+ years of financial management experience
- Knowledge of not-for-profit accounting
- Exceptional financial and analytical abilities, with demonstrated experience using metrics to inform decision-making
- Experience implementing both financial and process discipline in past roles, including in-depth knowledge of forecasting and financial planning
- Strategic growth/planning experience and proven ability to guide execution
- Strong leadership skills with a focus on listening, collaboration and respect and an enthusiasm for coaching others
- Commitment to a collaborative, inclusive, and transparent culture with a learning orientation
- Excellent judgment and creative problem-solving skills
- Clear and compelling communications and interpersonal skills
- Mature and proactive attitude with experience serving as a business partner to senior management
- Proven commitment to the mission of Catalyst Public Schools

Compensation:

Salary for this position is competitive and commensurate with experience. We offer a comprehensive benefits plan as well as the opportunity to have a deep impact on a growing, mission-driven organization that believes that all scholars in our region can achieve their full potential and live the lives of their dreams.

Application Procedure:

Please submit an application by email to jobs@catalystpublicschools.org by March 15, 2019. The application should include a resume as well as a cover letter highlighting both your experience and your proven commitment to our mission and vision. Please include contact information for three (3) professional references.



Office Manager

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The Opportunity:

Catalyst Public Schools is searching for a full time Office Manager.

This role will primarily support our two school co-founders, managing their busy schedules with both internal and external stakeholders, coordinating travel (as needed), and managing reimbursements. As our office manager, you'll manage our main school office in Bremerton. You'll help scale our office space and manage planning as we grow our team, keeping supplies stocked, and providing logistical support for our teams. This position reports to the school co-founder/CEO.

We need a passionate and organized self-starter, who can multitask while keeping calm and maintaining order in a sometimes-chaotic environment. Excellent communication skills and general friendliness mandatory.

Essential Duties and Responsibilities:

- Manage school co-founders' calendars, including scheduling internal and external meetings and school events
- Ensure the smooth operation of school office, including monitoring and ordering needed office supplies and maintaining a productive space and working environment
- Leading our efforts to effectively gather, track, and analyze student enrollment data as well as other logistical information
- Coordinate logistical arrangements for staff, job candidates, and occasionally volunteers or external partners, as directed by the co-founders
- Complete expense reports for school co-founders & school credit card
- Assist as needed in coordinating logistics for large school events and meetings, which typically includes securing a location, printing and collating materials, ordering food, and other related logistical support as needed
- Track and manage school logistics including attendance, meal-tracking, and transportation management
- Participate in fundraising and administrative activities as required
- Support the team in other ways as required

Qualifications:

- Associate's, BA/BS degree or equivalent practical experience
- Minimum 2 years full-time experience as an office manager or equivalent relevant experience
- Demonstrated strength in managing complex schedules
- Demonstrated ability to contribute to a team in a very dynamic learning environment
- Demonstrated ability to write and speak clearly and persuasively
- Ability to maintain confidentiality of extremely sensitive and private data
- Exceptional interpersonal skills, a customer service orientation, and the ability to establish and maintain effective and appropriate working relationships with staff, volunteers, and outside organizations
- Experienced with and able to work effectively in a multicultural work environment
- Spanish language proficiency desired
- Work experience in low-income communities desired
- A valid driver's license and reliable vehicle is required to fulfill job requirements

Compensation:

Salary for this position is competitive and commensurate with experience. We offer a comprehensive benefits plan as well as the opportunity to have a deep impact on a growing, mission-driven organization that believes that all scholars in our region can achieve their full potential and live the lives of their dreams.

Application Procedure:

Please submit an application by email to jobs@catalystpublicschools.org by March 15, 2019. The application should include a resume, cover letter, and contact information for three (3) professional references.



Community and Family Engagement Coordinator

About Catalyst Public Schools:

Catalyst Public Schools: Bremerton will serve 224 scholars from South Kitsap, Central Kitsap, and Bremerton beginning with grades K, one, five, and six in 2020. At Catalyst, we believe that it is every adult's job to cultivate the critical hope, optimism, and leadership required for scholars to envision and access the future of their dreams. We place **diversity, equity, and inclusion** at the center of all we do; provide **rigorous academics and dynamic supports** to our scholars; support them as they find their **purpose and passion** in life; and provide **world class staff development** to continuously improve.

Our Vision:

Catalyst: Bremerton's graduates build a strong understanding of themselves, envision the world in which they want to live, and develop the agency to access the future of their dreams. We consider equity first as we develop a network of schools that serves as a national model for how schools can be catalysts of positive community change when families, schools, and community come together to put the interests of scholars first.

Our Mission:

Catalyst: Bremerton supports our diverse scholars to live full lives and to succeed in college, career, and life. Catalyst scholars find their purpose and passion so that they can cultivate the critical hope, optimism, and leadership essential to be catalysts in their community and world.

Our Values:

Catalyst Public Schools' culture is rooted in **six core values**. At the center is **equity** around which we aim to exemplify **achievement, joy, wellness, courage, and leadership**. These values are the foundation upon which all aspects of Catalyst Public Schools are set.

The Opportunity:

Catalyst Public Schools seeks an exceptional Community Engagement Coordinator. This position requires a self-motivated, collaborative professional who has proven ability to successfully work with diverse stakeholders.

The Community Engagement Coordinator will lead our student recruitment and enrollment efforts, ensuring that the school is robustly enrolled and able to thrive. The Coordinator will also lead recruitment for Catalyst's Community Advisory Council, a community-driven leadership team for Catalyst families. The

Coordinator will support our instructional staff to ensure that they are well-equipped to foster deep relationships with the families of our scholars.

This position reports to the School Co-Founder.

Essential Duties and Responsibilities:

- Effectively communicating the mission, vision, and values of Catalyst Public Schools
- Building relationships with students, families and the community
- Recruiting and following up with students and families
- Attending recruiting events
- Supporting parents through the registration process
- Communicate components of academic program
- Successfully tailor their recruiting pitches to different audiences
- Identifying and implementing effective recruitment strategies
- Translation of documents into languages of Catalyst families

Qualifications:

- Associate's degree or BA/BS
- Relevant experience working in a similar position
- Strong written and oral communication skills
- Fluency in Spanish preferred
- Ability to thrive in a high-paced working environment
- Enthusiasm to work a flexible schedule and to attend events on evenings and weekends
- Proven experience and in planning and implementing results-based outreach efforts

Compensation:

Salary for this position is competitive and commensurate with experience. We offer a comprehensive benefits plan as well as the opportunity to have a deep impact on a growing, mission-driven organization that believes that all scholars in our region can achieve their full potential and live the lives of their dreams.

Application Procedure:

Please submit an application by email to jobs@catalystpublicschools.org by March 15, 2019. The application should include a resume, cover letter, and contact information for three (3) professional references.



Catalyst: Bremerton

Section 14: Attachment 11

Contents

- Articles of Incorporation
- Proof of Non-Profit Status and Tax-Exempt Status (copies of filings for tax-exempt status)
- Bylaws
- Board Chair Statement of Assurances
- Catalyst Public Schools Business Plan

ARTICLES OF INCORPORATION FOR CATALYST PUBLIC SCHOOLS

ARTICLE I NAME

The name of this Corporation is “Catalyst Public Schools”.

ARTICLE II DURATION

The period of its duration shall be perpetual.

ARTICLE III PURPOSES

3.01 The Corporation is organized exclusively for charitable, educational and scientific purposes, including, for such purposes, the making of distributions to organizations that qualify as exempt organizations within the meaning of §501(c)(3) of the Internal Revenue Code or corresponding section of any future federal tax code.

3.02 Subject to the foregoing, the purpose of forming this nonprofit Corporation shall be to provide education to students in the State of Washington in any combination of grades ranging from kindergarten through twelve (12).

3.03 The Corporation shall admit and assist any race, color, national and ethnic origin to all the rights, privileges, programs, and activities generally accorded or made available to its general membership. It shall not discriminate on the basis of race, color, national and ethnic origin in administration of its policies.

3.04 The foregoing notwithstanding, the Corporation shall be entitled to serve any other purpose, as determined by its Board of Directors, consistent with the limitations set forth in paragraph 3.01 of this Article.

ARTICLE IV POWERS

4.01 The Corporation shall have all powers conferred on, or not prohibited of, non-profit organizations organized pursuant to Chapter 24.03 of the Revised Code of Washington; provided, however, the Corporation shall have no power or authority to carry on any activity not permitted to be carried on by (1) an organization exempt from federal income tax pursuant to §501(c)(3) of the Internal Revenue Code or corresponding section of any future federal tax code, or (2) an organization, contributions to which are deductible under §170(c)(2) of the said Code.

4.02 No substantial part of the activities of the Corporation shall be the carrying on of propaganda, or otherwise attempting to influence legislation, and the Corporation shall not participate in, nor intervene in (including the publishing or distribution of statements) any political campaign on behalf of or in opposition to any candidate for public office.

ARTICLE V NON-PROFIT CORPORATION

5.01 The Corporation shall be organized and operated as a non-profit, non-stock Corporation pursuant to Chapter 24.03 of the Revised Code of Washington.

5.02 No part of the net earnings of the Corporation shall inure to the benefit of, or be distributable to, its members, trustees, officers, directors, or other private persons, except that the Corporation shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth above.

ARTICLE VI BOARD OF DIRECTORS

6.01 The Corporation shall be managed by its Board of Directors, which shall be no less than five (5) and no greater than nine (9) in number, as determined from time to time by majority vote of the Board of Directors.

6.02 Unless otherwise provided in the Corporation's Bylaws, vacancies on the Board of Directors shall be filled by majority vote of the remaining Board of Directors.

ARTICLE VII INCORPORATOR

The name and address of the incorporators are:

Amanda Gardner
603 Klickitat Place NE
Bainbridge Island, WA 98110

Tatiana Epanchin
12612 Kaligren Road NE
Bainbridge Island, WA 98110

ARTICLE VIII INDEMNIFICATION

The Corporation shall indemnify its officers and directors to the full extent permitted by law.

ARTICLE IX
BYLAWS

The Board of Directors shall adopt, by majority vote, such bylaws as it deems appropriate and as not inconsistent with these Articles, for the internal governance of the Corporation.

ARTICLE X
AMENDMENT

These Articles may be amended by majority vote of the members of the Board of Directors.

ARTICLE XI
DISSOLUTION

Upon the dissolution of the Corporation, its assets shall be distributed to one or more organizations or entities exempt from taxation pursuant to § 501(c)(3) of the Internal Revenue Code, or corresponding section of any future federal tax code, or shall be distributed to the federal government, or to a state or local government, for a public purpose.

ARTICLE XII
REGISTERED OFFICE AND AGENT

The registered agent and registered office address of the Corporation shall be as follows:

Steven O. Anderson
Stamper Rubens, P.S.
720 W. Boone, Suite 200
Spokane, WA 99201

DATED this 20th day of November, 2018.



AMANDA GARDNER



TATIANA EPANCHIN

BYLAWS OF CATALYST PUBLIC SCHOOLS

ARTICLE I OFFICES

1.01 Registered Office and Registered Agent. The registered office of the Corporation shall be located in the state of Washington at such place as may be fixed from time to time by the Board of Directors upon filing of such notices as may be required by law. The registered agent shall have a business office identical with such registered office.

ARTICLE II CHARITABLE PURPOSES/NEGATION OF PECUNIARY GAIN

2.01 Charitable purposes. The Corporation is organized exclusively for charitable, scientific, literary, or educational purposes within the meaning of §501(c)(3) of the Internal Revenue Code of 1986, as amended, or corresponding provisions of any subsequent federal tax laws, as designated in the Restated Articles of Incorporation, filed with the Secretary of State on _____, and as amended thereafter.

Notwithstanding any provisions of these Bylaws to the contrary, this Corporation shall not conduct or carry on any activities not permitted to be conducted or carried on by an organization qualified for tax-exempt status under §501(c)(3) of the Internal Revenue Code of 1986, as amended, or corresponding provisions of any subsequent federal tax laws. Furthermore, this Corporation shall neither conduct nor carry on any activities which subject the Corporation to liability for excise taxes imposed pursuant to §§4941, 4942, 4943, 4944, or 4945 of the Internal Revenue Code of 1986, as amended, or corresponding provisions of any subsequent federal tax laws.

The Corporation shall not devote any part of its activities to carrying on propaganda, or otherwise attempting to influence legislation; nor shall the Corporation participate or intervene in any political campaign (including the publishing or distributing of statements) on behalf of any candidate for public office.

2.02 Negation of pecuniary gain. No part of the net earnings of this Corporation shall ever inure to or for the benefit of or be distributable to its directors, officers, or other private persons, except that the Corporation shall be empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the exempt purposes for which it was formed.

ARTICLE III
MEMBERS

3.01 Membership. The Corporation shall have no members.

ARTICLE IV
BOARD OF DIRECTORS

4.01 Number and Powers. The management of all the affairs, property, and interests of the Corporation shall be vested in a Board of Directors. The Board of Directors shall consist of no fewer than five (5) and no more than nine (9) Members. The terms of the directors shall be two (2) year, expiring at the annual meeting following their election, except that at least half of the initial Members of the Board of Directors shall be elected to serve an initial one (1) year terms to ensure that approximately half of the Board is elected in any given year thereafter. At each annual meeting, the directors shall be elected to succeed the directors whose terms expire at such meeting. In addition to the powers and authorities expressly conferred upon it by these Bylaws and Articles of Incorporation, the Board of Directors may exercise all such powers of the Corporation and do all such lawful acts and things as are necessary to carry out the business of the Corporation.

4.02 Term Limits. Directors may serve up to a maximum of five (5) terms or a total of ten (10) years, after which he or she may not be re-elected for one (1) term. Such term limits shall be calculated from the adoption date of these Bylaws forward (i.e., past terms will not be counted in the term limits, whereas any term currently being served as of the adoption date will be counted in the term limits) regardless of how many terms a Director may have served in the past. Notwithstanding the foregoing, in the event the Corporation cannot find a new member to fill the vacant position on the Board of Directors, the remaining members of the Board of Directors may, by unanimous vote, elect to waive the term limits provision for such period.

4.03 Change of Number.

a. The current number of directors serving may at any time be increased or decreased, between five (5) and nine (9) Members, by a majority of the entire Board of Directors, but no decrease shall have the effect of shortening the term of any incumbent director.

b. The number of directors authorized to serve on the Board of Directors under these Bylaws may at any time be increased or decreased by an amendment of these Bylaws, but no decrease shall have the effect of shortening the term of any incumbent director.

4.04 Vacancies. All vacancies in the Board of Directors, whether caused by resignation, death or otherwise, may be filled by the affirmative vote of a majority of the remaining directors. At such time as the Board of Directors may drop below the minimum number of five (5), whether by resignation, death or otherwise, the Board of Directors shall be authorized to carry out business with that reduced number for the maximum period required to fill the vacant position(s). A director elected to fill any vacancy shall hold office for the unexpired term of the predecessor director and until a successor is elected and qualified.

4.05 Regular Meetings. Regular meetings of the Board of Directors may be held at the Corporation's business office or at such other place or places, either within or without the state of Washington, as the Board of Directors may from time to time designate. The annual meeting shall be held each year during the month of December at a date, time and place as the Board of Directors shall designate by written notice. In addition to the annual meeting, there shall be regular meetings of the Board of Directors held, with proper notice, not less frequently than once each calendar quarter. Minutes shall be kept at all meetings of the Board of Directors.

4.06 Special Meetings. Special meetings of the Board of Directors may be called at any time by the President or upon written request by any two directors. Such meetings shall be held at the registered office of the Corporation or at such other place or places as the directors may from time to time designate. When called by written request of any two directors, such directors shall be charged with providing proper notice of the special meeting in accordance with §4.07. Minutes shall be kept of all Special Meetings.

4.07 Notice. Notice of all meetings of the Board of Directors (regular, annual and special) shall be given to each director by seven (7) days prior service of the same by email, letter, or personal delivery. Such notice shall designate the time and place of the meeting, but need not specify the business to be transacted at, nor the purpose of, the meeting.

4.08 Posting Electronic Notice. Notice may be provided to directors by posting the notice on an electronic network and delivering to such directors a separate record of the posting, together with comprehensible instructions regarding how to obtain access to the posting on the electronic network. Notice is effective when it has been posted to an electronic network and a separate record of the posting has been delivered to the recipient as provided by this §4.08.

4.09 Waiver of Notice. Waiver of notice can be made in one of the following two ways:

a. Attendance of a director at a meeting shall constitute a waiver of notice of such meeting, except where a director attends for the express purpose of objecting to the transaction of any business because the meeting is not lawfully called or convened; or

b. A waiver of notice signed by the director or directors, whether before or after the time stated for the meeting.

4.10 Quorum. A majority of the Members of the entire Board of Directors shall be necessary and sufficient at all meetings to constitute a quorum for the transaction of business.

4.11 Manner of Acting. The act of the majority of the directors present at a meeting at which there is a quorum shall be the act of the Board of Directors, unless the vote of a greater number is required by these Bylaws, the Articles of Incorporation or applicable Washington law.

4.12 Voting by Electronic Transmission. Votes for successor directors may be cast by electronic transmission, provided that the Corporation has designated an address, location or system to which the ballot may be electronically transmitted.

4.13 Meetings by Telephone. Members of the Board of Directors or any committee designated by the Board of Directors may participate in a meeting of such Board of Directors or committee via conference telephone or similar communications equipment by means of which all persons participating in the meeting can hear each other at the same time. Participation via such equipment shall constitute presence in person at a meeting.

4.14 Registering Dissent. A director who is present at a meeting of the Board of Directors at which action on a corporate matter is taken shall be presumed to have assented to such action unless the director's dissent or abstention shall be entered in the minutes of the meeting, or unless the director shall file a written dissent or abstention to such action with the person acting as the secretary of the meeting before the adjournment thereof, or shall forward such dissent by registered mail to the Secretary of the Corporation immediately after the adjournment of the meeting. Such right to dissent or abstain shall not apply to a director who voted in favor of such action.

4.15 Remuneration. No stated salary shall be paid to directors, as such, for their service, but by resolution of the Board of Directors, a fixed sum and expenses of attendance, if any, may be allowed for attendance at each annual, regular or special meeting of such Board of Directors; provided that nothing herein contained shall be construed to preclude any director from serving the Corporation in any other capacity and receiving compensation therefore. Members of ad hoc or standing committees may be allowed like compensation for attending committee meetings.

4.16 Loans. No loans shall be made by the Corporation to any director.

4.17 Removal. Any director may be removed at any time, with or without cause, by the affirmative vote of two-thirds (2/3) of the whole Board of Directors. Notice stating that a named director shall be considered for removal and the cause, if any, for such removal must be mailed to the director prior to a duly called meeting of the Board of Directors at the same time and in the same manner prescribed for the notice of the meeting.

4.18 Action by Directors without a Meeting. Any action required or permitted to be taken at a meeting of the directors, or of a committee thereof, may be taken without a meeting by a written consent setting forth the action so to be taken, signed by all the directors, or all of the Members of the committee, as the case may be, before such action is taken. Such consent shall have the same effect as a unanimous vote. Any such action may also be ratified after it has been taken, either at a meeting of the directors or by unanimous written consent.

ARTICLE V
OFFICERS

5.01 Designations. The officers of the Corporation may be a President, Vice Presidents, Treasurer, Secretary and Assistant Secretary, and such other officers as the Board of Directors may designate. The Corporation shall have a President and Secretary. All officers shall be elected at the annual meeting for terms of one (1) year by the Board of Directors. Such officers shall hold office until their successors are elected and qualify. Any two or more offices may be held by the same person, except the offices of President and Secretary.

5.02 The President. The President shall preside at all meetings of the Board of Directors, shall perform such other duties as are incident to the office or are properly required of the President by the Board of Directors.

5.03 Vice President. During the absence or disability of the President, the Vice President shall exercise all the functions of the President. The Vice President shall have such powers and discharge such duties as may be assigned to the Vice President from time to time by the Board of Directors.

5.04 Secretary and Assistant Secretary. The Secretary, or his/her designee, shall issue notices for all meetings, except for notices of special meetings of the Board of Directors which are called by the requisite number of directors, such directors being charged with giving proper notice, shall keep minutes of all meetings, shall have charge of the corporate books, shall make such reports and perform such other duties as are incident to the office, or are properly required of the Secretary of the Board of Directors and shall maintain all committee reports.

5.05 Treasurer. The Treasurer, or his/her designee, shall have the custody of all monies and securities of the Corporation and shall keep financial records. The Treasurer, or his/her designee, shall disburse the funds of the Corporation in payment of the just demands against the Corporation or as may be ordered by the Board of Directors (taking proper vouchers for such disbursements) and shall render to the Board of Directors from time to time as may be required, an account of all transactions undertaken as Treasurer and of the financial condition of the Corporation. The Treasurer shall perform such other duties as are incident to the office or are properly required by the Board of Directors. The Treasurer shall provide a monthly report of the financial condition of the Corporation to the Board of Directors.

5.06 Delegation. If any officer of the Corporation is absent or unable to act and no other person is authorized to act in such officer's place by the provisions of these Bylaws, the Board of Directors may from time to time delegate the powers or duties of such officer to any other officer or any director or any person it may select.

5.07 Vacancies. Vacancies in any office arising from any cause may be filled by the Board of Directors at any regular or special meeting of the Board of Directors.

5.08 Other Officers. The Board of Directors may appoint or retain such other officers or agents as it shall deem necessary or expedient, who shall hold their offices for such terms and

shall exercise such powers and perform such duties as shall be determined from time to time by the Board of Directors.

5.09 Loans. No loan shall be made by the Corporation to any officer.

5.10 Term – Removal. The officers of the Corporation shall hold office until their successors are chosen and qualified. Any officer or agent elected or appointed by the Board of Directors may be removed at any time, with or without cause, by the affirmative vote of a majority of the whole Board of Directors, but such removal shall be without prejudice to the contract rights, if any, of the person so removed.

5.11 Bonds. The Board of Directors may, by resolution, require any and all of the officers to provide bonds to the Corporation, with surety or sureties acceptable to the Board of Directors, conditioned for the faithful performance of the duties of their respective offices, and to comply with such other conditions as may from time to time be required by the Board of Directors.

5.12 Salaries. The officers of the Corporation shall receive no salary. However, officers shall be reimbursed for reasonable expenses actually incurred in the performance of their duties. The President may recommend to the Board of Directors the salary of the Executive Director, if any, and the Executive Director shall recommend salaries for other employees, if any, and the Board of Directors shall approve or amend any such recommendations.

5.13 Repayment. Any payments made to a director, officer, or other employee of the Corporation for compensation, salary, bonus, interest, rent, or expense incurred by the party which shall be determined to be unreasonable in whole or in part by the Internal Revenue Service pursuant to §4941(d)(2)(E) of the Internal Revenue Code of 1986, as amended, shall be reimbursed by such director, officer, or employee to the Corporation to the full extent of such determination of unreasonableness. It shall be the duty of the Board of Directors to enforce repayment of each such amount. In lieu of repayment by the director, officer, or employee, subject to the determination of the Board of Directors, amounts may be withheld from future compensation or expense reimbursement payments of the director, officer, or employee, to the extent permitted by law, until the amount owed to the Corporation shall have been recovered.

ARTICLE VI EXECUTIVE DIRECTOR/EX OFFICIO

6.01 Executive Director. The Board of Directors may select an Executive Director who shall be responsible for the administration and conduct of the business and affairs of the Corporation pursuant to guidelines established by the Board of Directors. The Executive Director, if selected, may be compensated for services in that capacity in such amount and manner as the Board of Directors shall determine.

6.02 Board Service. The Executive Director or other designed of the Board of Directors may serve on the Board of Directors in a, Ex-Officio nonvoting capacity at the direction of the Board of Directors.

6.03 Liaison. The Executive Director shall act as a liaison between the Board of Directors and the staff and employees of the Corporation. The Executive Director shall have full exclusive authority with respect to employees of the Corporation, pursuant to any personnel or other policies adopted by the Board of Directors. The Executive Director shall also make salary recommendations for the employees of the Corporation. See §5.20.

6.04 Removal. The Executive Director may be removed at any time, with or without cause, by the affirmative vote of a majority of the whole Board of Directors.

6.05 Loans. No loan shall be made by the Corporation to the Executive Director.

ARTICLE VII COMMITTEES

7.01 Creation. The Board of Directors may appoint, from time to time, standing or ad hoc committees. Such committees may be vested with such powers as the Board of Directors may determine by resolution passed by a majority of the full Board of Directors. Provided that no such committee shall have the authority of the Board of Directors in reference to amending, altering, or repealing these Bylaws; electing, appointing, or removing any Member of any such committee or any director or officer of the Corporation; amending the Articles of Incorporation; adopting a plan of merger or adopting a plan of consolidation with another Corporation; authorizing the sale, lease, or exchange of all or substantially all of the property and assets of the Corporation other than in the ordinary course of business; authorizing the voluntary dissolution of the Corporation or adopting a plan for the distribution of the assets of the Corporation; amending, altering or repealing any resolution of the Board of Directors which by its terms provides that it shall not be amended, altered, or repealed by such committee or such other act(s) as only the Board of Directors may perform under the Corporation's Articles of Incorporation and Bylaws or otherwise under law. All committees so appointed shall keep regular minutes of the transactions of their meetings and shall cause them to be recorded in books kept for that purpose in the office of the Corporation. The designation of any such committee and the delegation of authority thereto, shall not relieve the Board of Directors, or any Board Member of any responsibility imposed by law.

7.02 Standing and Ad Hoc Committees.

a. **Standing Committee.** A committee designated as a Standing Committee shall serve continuously until such time as the Board of Directors dissolves such committee by a majority vote of the full Board of Directors. Standing Committees will be charged with assisting the Board of Directors with the continuous management and operation of the Center.

b. **Ad Hoc Committee.** A committee designated as an Ad Hoc Committee shall serve on a temporary basis for the purpose of assisting the Board of Directors in any particular matter as the Board of Directors may designate and shall be automatically dissolved at the conclusion of the matter for which they were created or upon a majority vote of the full Board of Directors.

7.03 Membership. Membership on Standing or Ad Hoc Committees shall be by appointment of the Board of Directors. Upon formation of a committee, at least one Board Member or officer shall be designated to serve on such committee. The Board Member or officer serving on the committee shall be the liaison between the Board of Directors and the committee. If at any time no Board Member or officer is serving on a committee, such committee shall designate one among its membership to make reports to the Board of Directors at each Board meeting as to the activities, progress, needs and concerns of the committee.

7.04 Duties – Communication with Board of Directors. Committees shall be charged with whatever duties the Board of Directors may designate in accordance with the purposes for which the committee was created. All committees shall have an obligation to ensure that the minutes of committee meetings are kept and regular reporting is made to the Board of Directors.

7.05 Nomination of Board Members. All committees shall have the ability to nominate Members to serve on the Board of Directors. The Board of Directors shall consider the nominations made by committees at each regular election of the Board of Directors. If a vacancy occurs, for whatever reason, with respect to a Board Member who was charged with acting as a committee liaison, the committee upon which that Board Member served shall nominate a replacement from among the committee membership. The Board of Directors shall have full discretion to elect or reject candidates nominated by committees.

7.06 Dissolution. The Board of Directors shall have the ability to dissolve any Standing or Ad Hoc Committee at any time by a majority vote of the full Board of Directors. Ad Hoc Committees may also be automatically dissolved upon completion of the purposes for which they were created. Standing Committees shall serve indefinitely until dissolution by the Board of Directors.

ARTICLE VIII RULES OF PROCEDURE

The rules of procedure at meetings of the Board of Directors and committees of the Board of Directors shall be rules as adopted by the Board of Directors, so far as applicable and when not inconsistent with these Bylaws, the Articles of Incorporation or any further resolution of the Board of Directors.

ARTICLE IX DEPOSITORIES

The monies of the Corporation shall be deposited in the name of the Corporation in such bank or banks or trust company or trust companies as the Board of Directors shall designate, and shall be drawn from such accounts only by check or other order for payment of money signed by such persons, and in such manner, as may be determined by resolution of the Board of Directors.

ARTICLE X NOTICES

Except as may otherwise be required by law, any notice to any director or officer may be delivered personally or by mail or e-mail. If mailed, the notice shall be deemed to have been delivered when deposited in the United States mail, addressed to the addressee at his or her last known address in the records of the Corporation, postage prepaid. If e-mailed, the notice shall be deemed to have been delivered when sent, unless returned by an automated notification of failure to deliver.

ARTICLE XI INDEMNIFICATION OF OFFICERS, DIRECTORS, EMPLOYEES, AND AGENTS

The Corporation shall indemnify its officers, directors, employees, and agents to the greatest extent permitted by law. The Corporation shall have power to purchase and maintain insurance on behalf of any person who is or was a director, officer, employee, or agent of the Corporation or who is or was serving at the request of the Corporation as an officer, employee, or agent of another Corporation, partnership, joint venture, trust, other enterprise, or employee benefit plan, against any liability asserted against such person and incurred by such person in any such capacity or arising out of any status as such, whether or not the Corporation would have the power to indemnify such person against such liability under the provisions of this Article.

ARTICLE XII CONTRACTS AND CONVEYANCES

All contracts, deeds, conveyances, negotiable instruments, and other instruments of like character which have first been approved by the Board of Directors shall be signed by the president or vice president and by the secretary or as otherwise directed by the Board of Directors. No contract of any officer of the Corporation shall be valid without previous authorization or subsequent ratification of the Board of Directors.

ARTICLE XIII BOOKS AND RECORDS

The Corporation shall keep correct and complete books and records of account and shall keep minutes of the proceedings of its Board of Directors; and shall keep at its registered office or principal place of business, or at the office of its transfer agent or registrar, a record of its directors, giving the names and addresses of all directors.

ARTICLE XIV
AMENDMENTS

A majority of the entire Board of Directors shall have power to make, alter, amend, and repeal the Bylaws of this Corporation.

Adopted by resolution of the Corporation's Board of Directors on 20 November 2018 .



AMANDA GARDNER, President



TATIANA EPANCHIN, Secretary/Treasurer

UNITED STATES OF AMERICA

The State of



Washington

Secretary of State

I, KIM WYMAN, Secretary of State of the State of Washington and custodian of its seal, hereby issue this

ARTICLES OF INCORPORATION

to

CATALYST PUBLIC SCHOOLS

A WA NONPROFIT CORPORATION, effective on the date indicated below.

Effective Date: 11/26/2018

UBI Number: 604 358 570



Given under my hand and the Seal of the State
of Washington at Olympia, the State Capital

Kim Wyman, Secretary of State

Date Issued: 11/26/2018



EIN Assistant

Your Progress: 1. Identity ✓ 2. Authenticate ✓ 3. Addresses ✓ 4. Details ✓

**5. EIN
Confirmation**

Congratulations! The EIN has been successfully assigned.

EIN Assigned: **83-2652050**

Legal Name: **CATALYST PUBLIC SCHOOLS**


The confirmation letter will be mailed to the applicant. This letter will be the applicant's official IRS notice and will contain important information regarding the EIN. Allow up to 4 weeks for the letter to arrive by mail.

We strongly recommend you print this page for your records.

Click "Continue" to get additional information about using the new EIN.

[Continue >>](#)

Help Topics

 [Can the EIN be used before the confirmation letter is received?](#)

ARTICLES OF INCORPORATION

UBI NUMBER

UBI Number:
604 358 570

BUSINESS NAME

Business Name
CATALYST PUBLIC SCHOOLS

PURPOSE OF CORPORATION

THE CORPORATION IS ORGANIZED EXCLUSIVELY FOR CHARITABLE, EDUCATIONAL AND SCIENTIFIC PURPOSES, INCLUDING, FOR SUCH PURPOSES, THE MAKING OF DISTRIBUTIONS TO ORGANIZATIONS THAT QUALIFY AS EXEMPT ORGANIZATIONS WITHIN THE MEANING OF 501(C)(3) OF THE INTERNAL REVENUE CODE. SUBJECT TO THE FOREGOING, THE PURPOSE OF FORMING THIS NONPROFIT CORPORATION SHALL BE TO PROVIDE EDUCATION TO STUDENTS IN THE STATE OF WASHINGTON IN ANY COMBINATION OF GRADES RANGING FROM KINDERGARTEN THROUGH TWELVE (12).

PURPOSE OF CORPORATION - STAFF CONSOLE CONFIRMATION

Customer provided purpose of corporation? - Yes

ANY OTHER PROVISIONS

Required by IRS for Tax Exempt Status <https://www.irs.gov/>:

REGISTERED AGENT

Registered Agent Name	Street Address	Mailing Address
STEVEN ANDERSON	720 W BOONE AVE STE 200, SPOKANE, WA, 99201-2560, UNITED STATES	720 W BOONE AVE STE 200, SPOKANE, WA, 99201-2560, UNITED STATES

REGISTERED AGENT CONSENT

Customer provided Registered Agent consent? - Yes

DURATION

Duration:
PERPETUAL

EFFECTIVE DATE

Effective Date:
11/26/2018

INITIAL BOARD OF DIRECTOR

Title	Initial Board of Director Type	Entity Name	First Name	Last Name	Address
INITIAL BOARD OF DIRECTORS	INDIVIDUAL		AMANDA	GARDNER	210 S. HUDSON STREET STE 324, SEATTLE, WA, 98134, UNITED STATES
INITIAL BOARD OF DIRECTORS	INDIVIDUAL		TATIANA	EPANCHIN	210 S HUDSON STREET STE 324, SEATTLE, WA, 98134, UNITED STATES
INITIAL BOARD OF DIRECTORS	INDIVIDUAL		TYKERA	WILLIAMS	210 S. HUDSON STREET STE 324, SEATTLE, WA, 98134, UNITED STATES
INITIAL BOARD OF DIRECTORS	INDIVIDUAL		JULIE	KENNEDY	210 S. HUDSON STREET STE 324, SEATTLE, WA, 98134, UNITED STATES
INITIAL BOARD OF DIRECTORS	INDIVIDUAL		AMY	KLYOTA	210 S. HUDSON STREET STE 324, SEATTLE, WA, 98134, UNITED STATES
INITIAL BOARD OF DIRECTORS	INDIVIDUAL		KATIE	NESMITH-SINGH	210 S. HUDSON STREET STE 324, SEATTLE, WA, 98134, UNITED STATES

INCORPORATOR

Title	Incorporator Type	Entity Name	First Name	Last Name	Address
INCORPORATOR	INDIVIDUAL		AMANDA	GARDNER	210 S HUDSON ST STE 324, SEATTLE, WA, 98134-2417, UNITED STATES

DISTRIBUTION OF ASSETS

DISTRIBUTION OF ASSETS:

UPON THE DISSOLUTION OF THE CORPORATION, ITS ASSETS SHALL BE DISTRIBUTED TO ONE OR MORE ORGANIZATIONS OR ENTITIES EXEMPT FROM TAXATION PURSUANT TO 501(C)(3) OF THE INTERNAL REVENUE CODE, OR CORRESPONDING SECTION OF ANY FUTURE FEDERAL TAX CODE, OR SHALL BE DISTRIBUTED TO THE FEDERAL GOVERNMENT, OR TO A STATE OR LOCAL GOVERNMENT, FOR A PUBLIC PURPOSE.

DISTRIBUTION OF ASSETS PROVIDED

Customer provided information on distribution of assets? - Yes

RETURN ADDRESS FOR THIS FILING

Attention:

STEVEN ANDERSON

Email:

SANDERSON@STAMPERLAW.COM

Address:

720 W BOONE AVE STE 200, SPOKANE, WA, 99201-2560, UNITED STATES

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AUTHORIZED PERSON - STAFF CONSOLE

☒ Document is signed.

Person Type:

INDIVIDUAL

First Name:

STEVEN

Last Name:

ANDERSON

Title:



SOS

Office of the Secretary of State
Corporations & Charities Division

James M. Dolliver Building
801 Capitol Way South • PO Box 40234
Olympia, WA 98504-0234
Tel: 360.725.0377
www.sos.wa.gov/corps

Congratulations:

You have completed the initial filing to create a new business entity. **The next step in opening your new business is to complete a Business License Application.** You may have completed this step already. The Business License Application can be completed online or downloaded at:
<http://www.bls.dor.wa.gov/>.

If you have any questions about the Business License Application, or would like a Business License Application package mailed to you, please call Business License Services at 1-800-451-7985.

IMPORTANT

You have completed the initial filing to create a new entity. To keep your filing status active and avoid administrative dissolution, you must:

1. **File an Annual Report** and pay the annual license fee each year before the anniversary of the filing date for the entity. A notice to file your annual report will be sent to your registered agent. It is the corporation or LLC's responsibility to file the report even if no notice is received.
2. **Maintain a Registered Agent** and registered office in this state. You must notify the Corporations Division if there are any changes in your registered agent, agent's address, or registered office address. Failure to notify the Corporations Division of changes will result in misrouted mail, and possibly administrative dissolution.

STEVEN ANDERSON
720 W BOONE AVE STE 200
SPOKANE WA 99201-2560

If you have questions about report and registered agent requirements, please contact the Corporations Division at 360-725-0377 or visit our website at:
www.sos.wa.gov/corps.



STAMPER RUBENS, P.S.
ATTORNEYS AT LAW

STEVEN O. ANDERSON
sanderson@stamperlaw.com
admitted in WA and ID

January 4, 2019

**VIA CERTIFIED MAIL; RETURN
RECEIPT REQUESTED**

Internal Revenue Service
P.O. Box 12192
Covington, Kentucky 41012-0192

Re: Catalyst Public Schools
EIN: 83-2652050

Dear Sir or Madam:

Enclosed is a Form 1023 Application for Tax Exempt Status together with all attachments and additional forms. In addition, I am providing a check payable to the Internal Revenue Service in the amount of \$600.00 for the application fee.

Very truly yours,

STEVEN O. ANDERSON

SOA:1/4/2019
Enclosures
H:\Clients\Catalyst Public Schools\Ltr IRS 01042019.docx

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FAQs (<https://www.usps.com/faqs/uspstracking-faqs.htm>)

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***NOTE: Black and white (grayscale) images show the outside, front of letter-sized envelopes and mailpieces that are processed through USPS automated equipment.**

Feedback

STATEMENT OF ASSURANCES

=====

This Statement of Assurances must be signed by a duly authorized representative of the charter school.

As the duly authorized representative of the charter public school (the school), I hereby certify under the penalty of perjury that all information and statements submitted for or on behalf of Catalyst Public Schools are accurate and true to the best of my knowledge and belief; and further, I certify and assure that:

1. The School shall have a fully independent governing board that will exercise autonomy in all matters, to the extent authorized by chapter 28A.710 RCW, in such areas as budget, personnel and educational programs;
2. The School is either a public benefit nonprofit corporation as defined in RCW 24.03.490, or a nonprofit corporation as defined in RCW 24.03.005 that has applied for tax exempt status under section 501(c)(3) of the internal revenue code of 1986 (26 U.S.C. Sec. 501(c)(3)), shall not be a sectarian or religious organization, shall meet all of the requirements for a public benefit nonprofit corporation before receiving any funding under RCW 28A.710.220, shall be governed by an independent governing board, and shall be operated according to the terms of a charter contract executed with the Washington State Charter School Commission;
3. The School shall function as a local education agency under applicable federal laws and regulations, shall be responsible for meeting, and shall meet the requirements of local education agencies and public schools under those federal laws and regulations, including but not limited to:
 - a. Compliance with the individuals with disabilities education improvement act (IDEA, 20 U.S.C. Sec. 1401 et seq.);
 - b. Compliance with the federal educational rights and privacy act (FERPA, 20 U.S.C. Sec. 1232g);
 - c. Compliance with the elementary and secondary education act (ESEA, 20 U.S.C. Sec. 6301 et seq.);
 - d. Compliance with requirements that ensure a student's records, and, if applicable, a student's individualized education program, will follow the student, in accordance with applicable federal and state law;
 - e. Compliance with the Every Child Succeeds Act and the No Child Left Behind Act, to the extent that NCLS provisions remain active, including but not limited to, provisions on school prayer, the Boy Scouts of America Equal Access Act, the Armed Forces Recruiter Access to Students and Student Recruiting Information, the Unsafe School Choice Option and assessments;
 - f. Compliance with Title IX of the Education Amendments of 1972 (20 U.S.C. § 1681);
 - g. Compliance with Section 504 of the Rehabilitation Act of 1973 (29 U.S.C. § 794); and
 - h. Compliance with Title II of the Americans with Disabilities Act of 1990 (42 U.S.C. § 12101).
 - i. McKinney-Vento homeless assistance act of 1987 (42 U.S.C. Sec. 11431 et seq.
4. The School shall hire, manage, and discharge any charter school employee in accordance with the terms of Chapter 28A.710 RCW and the school's charter contract;
5. The School shall receive and disburse funds solely in accordance with the purposes of the charter school;

6. To the extent it enters into contracts with any school district, educational service district, or other public or private entity for the provision of real property, equipment, goods, supplies, and services, including educational instructional services and including for the management and operation of the charter school, the School shall do so to the same extent as other non-charter public schools, as long as the School's board maintains oversight authority over the charter school;
7. The School shall not enter into any contracts for management operation of the charter school except with nonprofit organizations;
8. To the extent it enters into contracts with other entities regarding real property, the School shall include provisions regarding the disposition of the property if the charter school fails to open as planned or closes, or if the charter contract is revoked or not renewed;
9. To the extent it issues secured and unsecured debt, including pledging, assigning, or encumbering its assets to be used as collateral for loans or extensions of credit to manage cash flow, improve operations, or finance the acquisition of real property or equipment, the School shall not pledge, assign, or encumber any public funds received or to be received pursuant to RCW 28A.710.220;
10. The School shall ensure that no debt incurred by the School is a general, special, or moral obligation of the state or any other political subdivision or agency of the state;
11. The School shall not pledge either the full faith and credit or the taxing power of the state or any political subdivision or agency of the state for the payment of the debt;
12. To the extent it solicits, accepts, and administers for the benefit of the charter school and its students, gifts, grants, and donations from individuals or public or private entities, the School shall not solicit, accept, and administer any such gifts, grants or donations from sectarian or religious organizations and shall not accept any gifts or donations the conditions of which violate Chapter 28A.710 RCW or any other state laws;
13. The School shall issue diplomas to students who meet state high school graduation requirements established under RCW 28A.230.090 even though the charter school board may establish additional graduation requirements;
14. The School shall not levy taxes or issue tax-backed bonds and shall not acquire or attempt to acquire property by eminent domain;
15. The School shall operate according to the terms of its charter contract and the provisions of Chapter 28A.710 RCW;
16. The School shall comply with local, state, and federal health, safety, parents' rights, civil rights, and nondiscrimination laws applicable to school districts and to the same extent as school districts, including but not limited to chapter 28A.642 RCW (discrimination prohibition), chapter 28A.640 RCW (sexual equality), RCW 28A.605.030 (student education records, RCW 28A.320.125 (safe school plans), and chapter 28A.210 RCW (health and screening requirements);
17. The School shall provide basic education, as provided in RCW 28A.150.210, including instruction in the essential academic learning requirements and shall participate in the statewide student assessment system as developed under RCW 28A.655.070 and in accordance with the requirements of chapter 28A.710 RCW;
18. The School shall employ certificated instructional staff as required in RCW 28A.410.025, provided that the Schools may hire non-certificated instructional staff of unusual competence and in exceptional cases as specified in RCW 28A.150.203 (7);
19. The School shall comply with the employee record check requirements in RCW 28A.400.303;
20. The School shall adhere to generally accepted accounting principles and be subject to financial examinations and audits as determined by the state auditor, including annual audits for legal and fiscal compliance;
21. The School shall comply with the annual performance report under RCW 28A.655.110;

.....

22. The School shall be subject to the performance improvement goals adopted by the state board of education under RCW 28A.305.130;
23. The School shall comply with the open public meetings act in chapter 42.30 RCW and public records requirements in chapter 42.56 RCW;
24. The School shall be subject to and comply with all legislation governing the operation and management of charter schools;
25. The School shall comply with all state statutes and rules made applicable to the charter school in the school's charter contract;
26. The School shall not engage in any sectarian practices in its education program, admissions or employment policies, or operations;
27. The School shall be subject to the supervision of the superintendent of public instruction and the state board of education, including accountability measures, to the same extent as other public schools, except as otherwise expressly provided by law;
28. The School shall not limit admission on any basis other than age group, grade level, or capacity and must enroll all students who apply within these bases and shall be open to any student regardless of his or her location of residence;
29. The School shall not charge tuition, but may charge fees for participation in optional extracurricular events and activities in the same manner and to the same extent as do other public schools;
30. If capacity is insufficient to enroll all students who apply to the charter school, the School must select students through a lottery to ensure fairness, however, the School must give an enrollment preference to siblings of already enrolled students;
31. The School's Board shall annually determine the capacity of the School in consultation with the Commission and with consideration of the School's ability to facilitate the academic success of its students, achieve the objectives specified in the charter contract, and assure that its student enrollment does not exceed the capacity of its facility;
32. The School shall comply with all health and safety laws, rules and regulations of the federal, state, county, region, or community that may apply to its facilities and property;
33. The School has disclosed any real, potential or perceived conflicts of interest that could impact the approval or operation of the School;
34. The School shall meet any reasonable preopening and/or reopening requirements or conditions imposed by the Commission, including but not limited to requirements or conditions to monitor the start-up progress of the School and to ensure that the School is prepared to open smoothly on the date agreed, and to ensure that the School meets all building, health, safety, insurance, and other legal requirements for school opening;
35. The School shall comply with, and fully participate in, any activity by the Commission that the Commission deems necessary for it to monitor, engage in oversight, and/or engage in corrective action pursuant to RCW 28A.710.180;
36. The School shall comply with any corrective actions or sanctions imposed upon it by the Commission pursuant to Chapter 28A.710 RCW;
37. The School shall comply with all renewal and nonrenewal actions required of it by the Commission or by law, including but not limited to the requirements imposed by RCW 28A.710.190 and .200;
38. The School shall comply with any nonrenewal of termination actions imposed by the Commission pursuant to Chapter 28A.710 RCW and duly adopted rules of the Commission;
39. The School shall report student enrollment in the same manner and based on the same definitions of enrolled students and annual average full-time equivalent enrollment as other public schools;

.....

40. The School shall comply with applicable reporting requirements to receive state or federal funding that is allocated based on student characteristics;
41. The School shall, at all times, maintain all necessary and appropriate insurance coverage;
42. The School shall indemnify and hold harmless the Commission and its officers, directors, agents and employees, and any successors and assigns from any and all liability, cause of action, or other injury or damage in any way relating to the School or its operation;
43. The School has not been assisted by any current or former employee of the state of Washington whose duties relate or did relate to this proposal or prospective contract, and who was assisting in other than his or her official, public capacity. If there are exceptions to these assurances, the School has described them in full detail on a separate page attached to this document.
44. The School will notify families of current and prospective students of any ongoing litigation challenging the constitutionality of charter schools or that may require charter schools to cease operations through web site postings and written notice with signed acknowledgement of receipt.
45. Board members will complete the financial affairs statement disclosures as required by law and address any conflicts identified by such disclosure.
46. All of the information submitted in the Application is true, correct, complete, and in compliance with Chapter 28A.710 RCW as well as Chapters 108-10 and 108-20 WAC.
47. All of the information contained in the Application reflects the original work of the applicant; no portion of the application was copied or plagiarized.
48. These assurances are made by the Board through its duly authorized representative. The Board has reviewed and discussed these assurances and passed a motion affirming current and future compliance with these assurances.

Catalyst: Bremerton

NAME OF SCHOOL

SIGNATURE OF DULY AUTHORIZED REPRESENTATIVE

1/10/19

DATE _____

Julie Kennedy

NAME OF DULY AUTHORIZED REPRESENTATIVE

Catalyst Public Schools Business Plan

1. Catalyst Public Schools Growth and Business Plan

Mission, Vision, and Partnerships

Catalyst Public Schools (CPS) is an independent 501(c)3 non-profit charter management organization that aims to launch and sustain schools of excellence across Kitsap and Mason counties. The first phase of the CPS growth plan includes launching two schools in Kitsap County. The first school is Catalyst: Bremerton, a K-8 school hoping to launch in the 2020 school year. The second school, tentatively opening in school year 2023, will be a high school offering grades 9-12 which will serve the same community as Catalyst: Bremerton. Growth plans for additional schools beyond these will be developed once the first two schools are excelling, both academically and financially.

Mission

Catalyst: Bremerton supports our diverse scholars to live full lives and to succeed in college, career, and life. Scholars will find their purpose and passion so that they can cultivate the critical hope, optimism, and leadership essential to be catalysts in their community and world.

Vision

Catalyst: Bremerton's graduates build a strong understanding of themselves, envision the world in which they want to live, and develop the agency to access the future of their dreams.

Values



CPS believes in partnering with community to co-create schools that are designed to meet the unique needs and context of each community served. Catalyst partners with families, community-based organizations, and others to ensure that scholars are supported holistically. Partners include:

- **Catalyst Design Team:** A group of scholars, families, and community members who meet regularly to envision and design the Catalyst school model. Design teams are created in each community where Catalyst will launch and convene monthly for approximately 18 months prior to school launch.

- **Olympic Educational Services District (OESD):** OESD provides technical support, back-office financial support, and professional development.
- **Seneca Family of Agencies (Seneca):** Seneca provides professional development around topics such as equity leadership, social emotional learning, and serving students with diverse needs. Seneca may also provide staffing support for key special education and other support roles at schools.
- **Washington State Charter Schools Association (WA Charters):** WA Charters provides support via their School Leadership Design Fellows and Strong Start programs. Support includes sessions around school finance and budgeting, application writing, equity leadership, and excellent school site visits.
- **True Measure Collaborative:** Provides special education support, services, and training.
- **Washington Charter School Development:** Supports the acquisition, development, and leasing of school facilities.
- **Raza Development Fund:** Supports financing options for school facilities as well as strategic thought partnership around facilities acquisition.

Growth Plan and Greenlighting Process

CPS is committed to serving Washington students; our growth plans include focusing on Kitsap County for our first phase of growth. We know that charter school growth is fueled by community demand; therefore, we aim to start schools in partnership with communities where there is a demonstrable need for new, innovative, high-quality public school options.

Eventually, we anticipate opening a network of schools across Kitsap, Mason, and/or Pierce counties. For now, we are beginning due diligence within target communities to assess the need for new school options and community and family demand. We believe that these counties are ideal potential locations for our school model given the population increase that is occurring in the region, overpopulation of schools in certain communities, educational gaps that persist across lines of race and class, and a lack of innovative public school options.

Anticipated Student Population

Catalyst creates schools equipped to meet the needs of all scholars, regardless of their previous academic background, and that are as diverse as the communities they serve, especially along lines of race and socioeconomic status. The following charts outline our anticipated demographics for Catalyst: Bremerton, as well as projected demographics for additional schools in neighboring communities.

Student Population	%FRL	%Special Education	%English Learners	%Students of Color
Catalyst: Bremerton (similar to Bremerton School District)	62	18	7	50
South Kitsap	35	15	2	30

Student Population	%FRL	%Special Education	%English Learners	%Students of Color
North Mason	54	15	12	31
Tacoma/Pierce County	56	15	11	60

Rationale for Growth Plan

CPS believes that public school choice is a vital ingredient to ensuring equitable outcomes for all scholars, especially those who have been traditionally marginalized from receiving an excellent education. Charter schools allow opportunities for innovation and equity-driven reforms to take root. This not only improves outcomes for the scholars who attend the charter school, but it can also have an impact on the performance of scholars in neighboring schools. CPS’s commitment to sharing best practices and collaborating with local school districts will foster this type of collective, positive impact.

Financial Viability

The proposed growth plan will ensure that CPS is a financially viable organization that can provide the essential educational and operational services that its schools need to thrive. The Financial Plan Workbook in **Section 27: Attachment 27** details the growth of the first and second CPS schools and the development of the charter management organization.

Market Analysis

CPS will locate in the Kitsap Peninsula of Washington state for several reasons. First, this region of the state is home to Catalyst co-founders, who are strongly compelled to work within their local communities to launch excellent schools. Second, there is demonstrated need and strong parent demand for new school options in this region. The charter school ballot initiative of 2012 was supported by Kitsap and Mason county voters. In Kitsap County, the initiative passed with a percentage of “yes” votes that exceeded the state average. In Mason County, the initiative passed with the widest “yes” margin in the entire state of Washington. In addition to this data, countless 1:1 conversations, community forums, and other engagement events have yielded significant proof that families are hungry for new public-school options, especially those that put students at the center of their learning and foster leadership development and academic success.

Organizational Capacity

Leadership Team and Capacity to Provide Educational and Operational Management

Details regarding the track record of success and the instructional and operational capacity of the school co-founders can be found in **Section 13**, **Section 26**, and **Section 28**.

Members of the CPS Board have similar track records of success and bring deep expertise to the organization. Information about each board member is below:

TyKera Williams has a background in children, youth, and family-related social service and has decided to become a clinical social worker in healthcare to make a difference in the world. As a Bremerton parent, she has a vested interest in the success of Catalyst and brings expertise in social work, trauma-informed practices, and youth development.

Julie Kennedy leads the academic and character practice on the Impact Team at Charter School Growth Fund and was a teacher, principal, and a Managing Director with Uncommon Schools in Brooklyn, NY. As Managing Director, Julie helped grow the region to 12 middle schools and three high schools and led the initial transition to Common Core-aligned instruction. She seeks to support Catalyst through her expertise in school governance, organization growth and scale, and school leadership and operations.

Katie Singh serves as the Director of Leadership Development with the Urban Schools Human Capital Academy (USHCA), a national nonprofit committed to improving human capital management in K-12 education. In this role, Katherine leads the design and delivery of several programs to build the skills of K-12 systems leaders. She is inspired by Catalyst's focus on equity and will bring expertise in human capital management.

Amy Kiyota began her career with the Philadelphia Education Fund, where she developed metrics to measure performance and supported fundraising efforts. She later worked in fundraising for the Asian Arts Initiative and as the Executive Director of the Pennsylvania Governor's Advisory Commission on Asian American Affairs. Most recently, Amy was Director of Operations for Leadership Prep Brownsville Middle Academy in Brooklyn where she managed all operational aspects of the charter school including finance, HR, student data, and enrollment. Amy brings expertise around finance, fundraising, and school operations to Catalyst to create a high-quality school option for Bremerton families.

CPS will add three additional Board members by May of 2019. Areas of expertise needed include: facilities acquisition, legal expertise, and community connections. The school founders are confident, given the number of highly qualified and diverse candidates in our board member pipeline, that this goal will be met.

Governance Structure at CPS and Schools

CPS will be governed by a Board of Directors that will hold the management office and each school to the terms of the charter for each school so that the mission is fulfilled. In addition, the Board of Directors serves to provide external accountability, internal oversight, and leadership of the organization. The CPS board will have strong local control over Catalyst: Bremerton and all other CPS schools. The members will be mission-driven, active, locally connected, and adept in the skills needed to govern high-performing schools for the scholars of Kitsap County and Washington State.

The Board will select the co-founders and CEO of Catalyst Public Schools and is responsible for overseeing, developing, and evaluating these senior staff members. In the first two years of operation, the Board will evaluate both co-founders. In Year 3, when the CMO office is established, the Board will appoint one CEO for CPS; this person will report directly to the board. The other co-founder will assume the role of Chief Academic Officer and will report to the CPS CEO.

The relationship between Catalyst: Bremerton's senior leadership team and the rest of the staff will be collaborative. For the first two years of operation the Catalyst: Bremerton leadership team will consist of the two co-founders, the Director of Finance and Operations, the Family/Community Engagement Manager and the school's Office Manager. In Year 3, each of these employees except the Office Manager will shift to the CMO office. At this point a new Principal, Assistant Principal/Learning Specialist, and an Operations and Business manager will be hired at the school and this group, along with the Office Manager, will be the school-based leadership team.

From there, the home office of the CMO will grow as needed to deliver services to Catalyst: Bremerton and other campuses that eventually open.

Board Processes to Ensure Mission Achievement

The CPS Board of Directors will monitor the academic, financial, and operational health of the organization so that they can ensure that the organization and schools are on track to fulfill their mission. CPS will create a detailed data dashboard that will hold relevant data regarding student academic performance, financial viability and sustainability, and operational excellence. This dashboard will be updated monthly and will be reviewed by the full board at board meetings and at board committee meetings, once established. In addition to the dashboard the Board will review monthly reports covering other topics such as data related to human resources, compliance, and more.

CPS has developed rigorous guidelines for opening new schools. These guidelines are built on best practices from high-performing charter management organizations such as UP Education Network and Impact Public Schools. These guidelines, which collectively form a greenlighting process the Board will use to determine when and where new schools will be launched, include:

- **Community engagement:** CPS seeks to launch schools where there is a measurable demand from parents and community for a new school option. There must be a core group of parent and community leaders in any new community who are willing to advocate for the school's launch.
- **Serving high-needs students:** We believe that for schools to be equitable, they must serve a significant percentage of students who are traditionally considered as "at-risk." These include scholars who identify as people of color, scholars who receive free and/or reduced lunch, scholars who would otherwise attend low-performing schools, scholars who have been identified as English Learners, and/or scholars with disabilities. CPS also aims to launch schools where there is a demonstrated need for a new school option, as evidenced by growing enrollment or lack of high-quality school options in the community.
- **Access to facilities:** Before green-lighting, the CPS board will complete an analysis of available facilities and/or paths to secure facilities.
- **Presence of a local community college and/or university:** CPS aims to launch schools in communities that have access to higher education as these organizations provide a pipeline of talent for the schools.
- **Political landscape:** CPS aims to open schools in districts or regions of the state where the political climate is conducive to opening schools.

The following factors would lead CPS to reassess its ability to open additional campuses:

- Facilities
 - Lease not signed by nine months prior to school opening
 - Occupancy costs exceed 10 percent of average daily attendance

- Failure to meet key construction milestones
 - Failure to receive zoning or permits needed
- Financials
 - Enrollment configuration is off-model
 - Projected scale-up costs exceed projected start-up philanthropy
 - Anticipated grants are not received
- Authorization/Charter Contract
 - Charter not likely to be received at a minimum of nine months before opening of school
 - Failure to meet any chartering milestones
 - Authorizing agency changes terms of charter contract

Provision of Educational Management Services

Beginning in Year 3, when the CMO will be established, each school will contribute 10% of their revenue to CPS. This revenue will be used to provide the following:

- Hiring and management of school-based principal;
- Operations and ancillary services (back office, food, technology, transportation);
- Student recruitment services;
- Facilities acquisition and management;
- Human resources and staff recruitment/retention;
- Leadership training, coaching, and professional development;
- Financial support (budget development, record keeping);
- Annual report preparation;
- Public relations;
- Teacher professional development; and
- Compliance and support for authorization, renewal, and reporting.

CPS will work in partnership with each school to agree to an annual Service Agreement that includes a 10% service fee for supports provided, allowing each school principal to focus on instructional leadership.



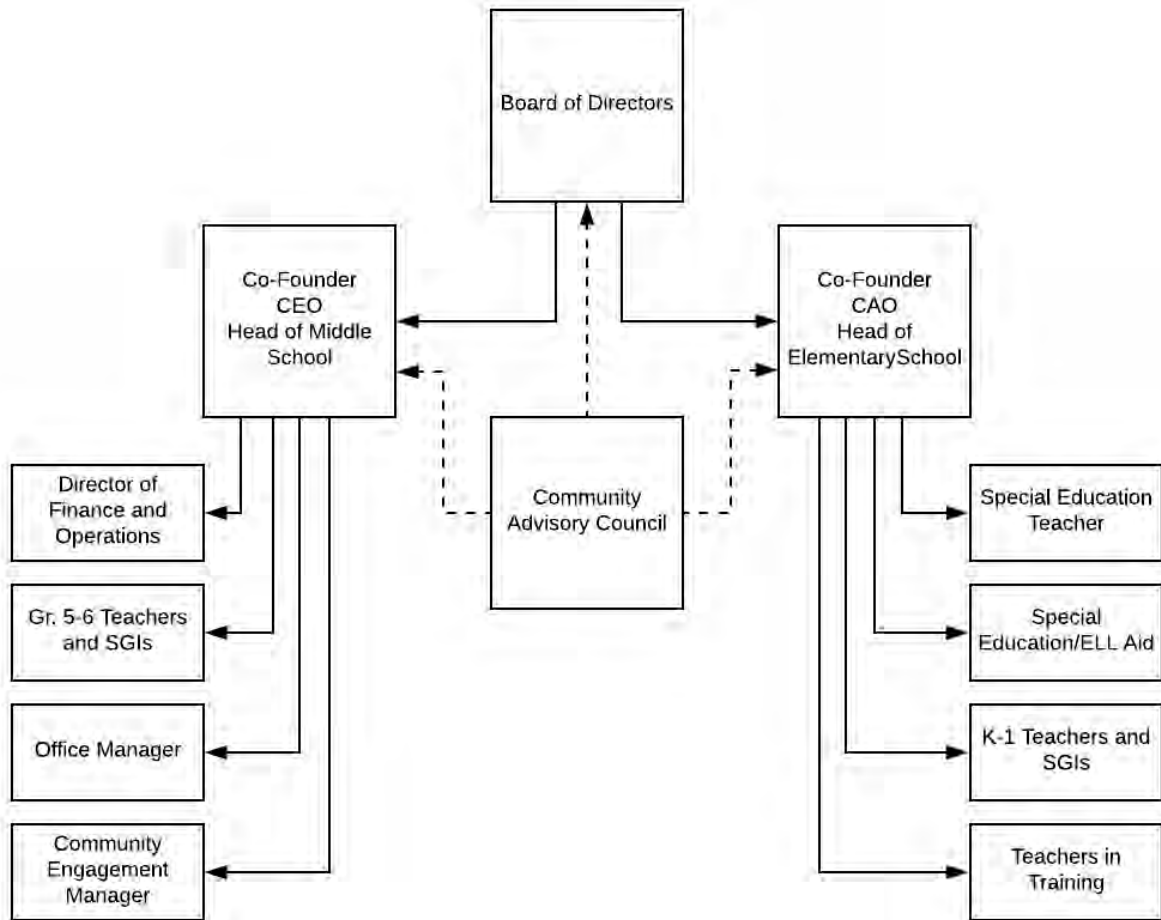
Catalyst: Bremerton

Section 15: Attachment 12

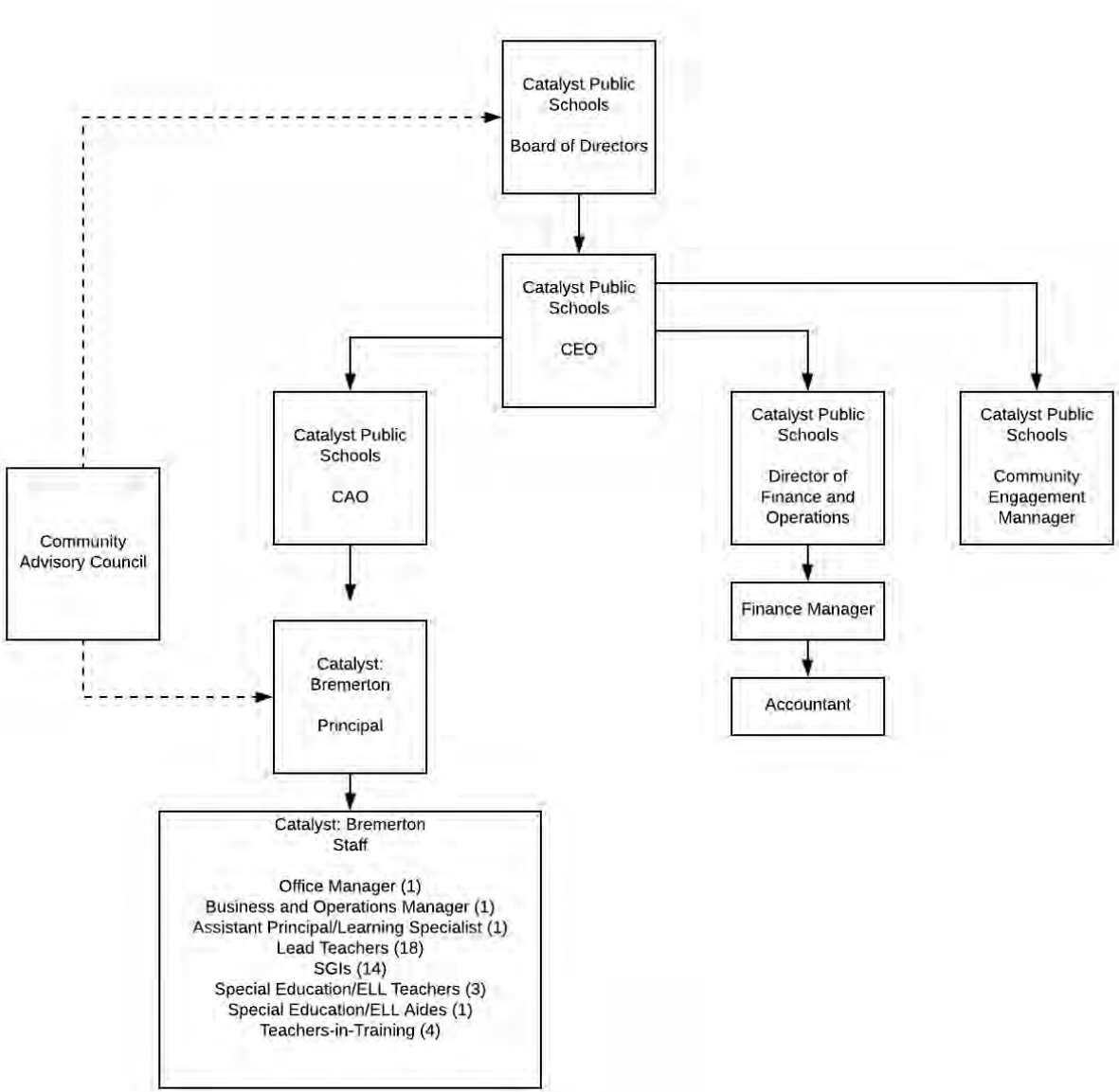
Contents:

- Organizational Chart Year 1
- Organizational Chart Year 4 (full capacity)

Year 1 Organizational Chart



Year 4 Organizational Chart (full capacity)





Catalyst: Bremerton

Section 15: Attachment 13

Contents:

- Olympic Educational Service District Back-Office Contract Draft
- Washington State Charter Schools Association Membership Offerings
- True Measure Collaborative Membership Services
- Seneca Family of Agencies Services



Olympic Educational Service District 114
105 National Avenue North • Bremerton, WA 98312
(360) 478-6894 • FAX (360) 405-5813

COST PROPOSAL FOR BUSINESS OFFICE SERVICES

Olympic Educational Service District (ESD) is one of nine regional educational agencies serving school districts, tribal compact schools, and state-approved private schools in Washington State. ESDs function primarily as support agencies and deliver educational services that can be more efficiently or economically performed regionally. ESDs assist the Superintendent of Public Instruction and the State Board of Education in the performance of their duties and provide technical and professional consultation in their liaison capacity between the Office of the Superintendent of Public Instruction and local school officials. ESDs strong relationships with educational stakeholders, vendors, and civic leaders will assist Charter School achievement.

ESD business office services include an array of services and responsibilities that offers the Charter School the opportunity to operate efficiently and with confidence that financial problems will not distract from focusing on what you do best – successfully educating every student.

The scope and cost of services presented below are predicated on the assumption that the School intends to utilize the Skyward/Qmlative Student and Business (Finance, Human Resources, and Payroll) Management Systems. This scope and cost of services are listed separately and includes licensing fees associated with obtaining these management systems and associated support and training.

The business office services presented span the continuum from initial set-up to on-going support in key fiscal and reporting areas.

Initial Set Up

Infrastructure Set Up: Work with OPSI to set up the School as a Local Education Agency (LEA) including funding and reporting stream between OSPI and the School. ESD will work with the county to establish bank accounts.

Revenue Services: Assist with preparation of all federal and state required forms and transmittal documents including Child Nutrition application, Part I of the Consolidated Application for funding under Title I, II, and III, student enrollment and staff reporting.

Accounting System: Set up chart of accounts in line with state accounting code structure. Set up internal control procedures and fiscal policies and procedures.

Student Enrollment Reporting: Establish Washington State accepted student information system and support.

Technical Assistance: Provide advice and recommendations on issues that may impact the fiscal soundness and sustainability of the school such as change to student enrollment, operational costs, and other factors.

Regular and Ongoing Support

Budget Development: Work with school leaders and stakeholders to develop annual budget for subsequent fiscal year in March/April of each year including Board approval no later than July 15. The budget will be aligned with required state account code structures. The budget will include an

overall organizational view including capital and multi-year and long term needs. Those multi-years needs include creating funds for unemployment, employee absences, insurance coverage and irregular maintenance and equipment needs. The budget will include a monthly cash flow projection.

Final Operating Budget Revision: ESD will work with the School to perform any needed revisions to the budget required by legislative action. Revisions will be made in context of real need requirements in order to avoid minutia.

Forecast: ESD will provide two forecasts per year: one using actual data from September and October, provided by the School by December 15, using actual data September through February, provided to the Charter School by April 15.

Financial Policies and Procedures: For Board approval, ESD will provide detailed financial policies and procedures that align with federal and state laws and regulations. The policies and procedures will offer comfort for proper business practices, audit compliance, and documentation.

Bookkeeping Services: General ledger maintenance including establishing and maintaining the School's general ledger per state account codes and the accounting manual for schools. ESD will monitor and edit revenue and expenditure account code structures, add program and location codes when needed, and perform all other regular maintenance.

- Balance Sheet reconciliation of all bank statements. Quarterly performs reconciliation of school balance sheet including prepaid/deposits, accounts receivable, accounts payable, payroll encumbrance and liability. Work will be based upon year to date perspective and will be delivered 30 days after appropriate month end closing.
- Accounts Payable invoices including verifying approval of payment determine cash flow availability, verify non duplication of payments, log appropriate accounting entries, produce check payments for signature, verify check security. Any discrepancies will be reported to the School Administrator or designee with three business days of ESD becoming aware of the discrepancy.
- Monitor and record receipt of revenue to ensure that school receives all entitlements and active grants. Perform collection activities to receive past due funding, not including initiation of legal proceedings.

Audit Support: Collect and format all information regularly required by auditors including Schedule of Expenditures of Federal Awards (SEFA), grant accounts and awards, leases, contracts, policies and procedures, and fiscal information.

Financial Management and Reporting: Prepare and transmit standard financial reports to school administrator monthly by the 15th business day of the following reporting month. Prepare and transmit state required budget documents and state required year end expenditure documents to OSPI. Prepare and submit budget extension documents, if necessary.

Payroll Processing:

- Maintain employee information in a secure payroll database. ESD will process any status updates, new hire, termination and or informational changes in the payroll system based upon information submitted by the school on pre agreed upon status change request forms.
- ESD will provide the school payroll schedule for the school year and if appropriate calendar year which includes accrual periods and deadlines for ESD to receive from the school new hire documentation, personnel change forms and payroll time data for each respective pay period.
- The school is responsible to submit all information no later than 5PM on deadline days per the school's payroll schedule. Payroll information received late will be deferred to the next month's regular payroll cycle.
- ESD will prepare and disseminate accurate W-2s as required by law.

Attendance Reporting: Support the school preparing and submitting monthly attendance reports from school provided records to OSPI.

Staff Reporting: Prepare and submit monthly staffing reports from school provided records to OSPI.

Reports required by Washington State Charter School Commission: In conjunction with the School, provide information and data for school submission of reports required by the Charter Commission.

Categorical Funding Applications: Prepare funding applications for governmental sources identified in the School's budget. In the event new governmental funding sources become available, funding program elements and pricing will be revised if the school wishes ESD to pursue funding. Applications will be co-developed with the school administrator with decision to pursue sources the responsibility of the school.

Compliance and Fiscal Reporting: ESD will disseminate fiscal reports to Auditors, lenders and creditors as required.

Technical Assistance: ESD will work with school administrative staff to ensure understanding and compliance of all pertinent state and federal laws and rules that applies to Charter Schools.

Compliance Monitoring: ESD will notify the school immediately when issues arise. ESD will use its best professional judgment as to how to address a compliance issue. ESD will always notify the school administrator first. Ensuing action or not will be dictated by the compliance issue.

Efficiency: ESD will search for cost savings methods and programs and wherever possible, recommend means to leverage work and create greater efficiencies through partnerships, cooperatives and other resources.

Additional Services: The School may request ESD to provide additional services. If ESD agrees to provide Additional Services, these services will be described in detail in a separate cost proposal.

Estimated Cost Range: Proposed Business Office Services are priced at \$50,000 to \$60,000 per year. This cost range is based on an estimate of the days required by ESD to deliver the services called for in this proposal and that extensions of this scope of services will require both parties to evaluate the required days of service based on:

- (1) the services desired and/or needed in the future period; and
- (2) the capability of assigned participating charter school personnel in independently performing functions related to those services

2018-19 Fee for Skyward/Qmlative Student and Business System in addition to Business Service Fee:

\$9,398.40 annually includes licensing/software fees and ongoing training and support:

Western Regional Information Service Center				220 Minimum FTE	
Appendix F	Fiscal System Only				
		WSIPC	\$ 19.24		\$ -
		WRDC	\$ 12.24		\$ -
	Fiscal and Student System	WSIPC	\$ 19.24	220.00	Estimated \$ 4,232.80
		WRDC	\$ 23.48	220.00	Estimated \$ 5,165.60

WA CHARTERS MEMBERSHIP 2018-2019

School quality is the single most important factor in long-term sector-wide success and the success of WA Charters.

A high-quality school meets the diverse needs of all its learners, demonstrates high levels of student achievement, retains talented staff, and is financially and operationally healthy.

As a membership organization, WA Charters provides operating schools with responsive, differentiated services and supports to achieve and maintain a high degree of quality. As the sector in Washington is still young, we anticipate that these services will grow and change as the needs of our schools evolve. A full listing of our current technical assistance offerings for member schools is provided below. Schools in their planning year pay \$500 and operating schools pay \$5.00/student annually.

WA Charters provides the following **sector-wide supports** to member schools:

Sector-wide Communications

- Cultivation, coordination, and promotion of positive earned media stories
- Ongoing paid digital media campaigns to increase awareness of charter public schools
- Sector-wide messaging, trainings, and tools
- Website resources including: blog focusing on sector success stories, school-finder tool, FAQ, growth and achievement data

Sector-wide Community Engagement

- Civic engagement opportunities for parents
- Legislator/community stakeholder school visits
- CBO relationship-building in new regions
- Regional Charter 101 sessions

Sector-wide Policy and Advocacy

- Legal representation in sector-wide cases
- Legislative advocacy for charter issues
- Sector data collection

Sector-wide Networking and Collaboration

- Annual WA Charters Conference
- Quarterly Member Council meetings
- Quarterly stakeholder meetings
- Regional work groups

Sector-wide School Development

- Aspiring Leaders Program
- School Leadership and Design Fellowship
- A la carte application coaching

WA Charters provides the following **planning and operating supports** to member schools:

Communications

- Placement and promotion of positive earned media stories about schools
- Enrollment support through annual paid digital media campaigns (Facebook, Google, Twitter ads)
- Media training and customized crisis communications coaching and messaging
- Event support: live tweeting, support with media advisories and press releases
- School-specific features on WA Charters blog
- Bi-annual professional school photography with usage privileges

Compliance

- On-demand regulatory guidance
- Monthly Commission updates
- Annual compliance calendar
- Membership to Washington Association of School Business Officials
- S-275 filing support for non-Skyward schools
- Regional truancy board development

- Access to the Washington Assessment of the Risks and Needs of Students (WARNS)

Family and Community Engagement (FACE)

- FACE staff professional learning community (PLC)
- Monthly parent newsletter and regional parent trainings
- CBO tabling and event sponsorship
- Student recruitment coaching
- Title 1 Parent and Family Engagement compliance support
- School-based FACE professional development
- Support for school-based parents groups (training and coaching)

Finance

- Planning, Implementation, and Operating grants
- Budget review and revenue forecasting
- Expense benchmarking consultation

Fundraising

- Fundraising capacity assessment and plan development
- Trainings for staff, leaders, parents, and board
- Grant opportunities database
- Prospect list development and research support
- On-demand coaching

Governance

- TFA WA – WA Charters Nonprofit Leadership Fair
- OPMA / PRA trainings
- Equity-driven decision making
- Board best practices trainings (*see attached for full list of available trainings*)

Operations

- Bi-weekly Strong Schools Bulletin
- Operations listserv and collaborative
- Templates and guides resource bank
- Vendor directory
- On-site technical assistance

Staff Recruitment

- TFA WA corps members placement
- TFA WA – WA Charters local and national recruitment events
- Job fair table sponsorship
- WA Charters resume collection and job board
- WorkMonger headhunting services

Start-Up

- Strong Start Program for new leaders

True Measure Collaborative (TMC) (*Additional membership fee; see attached for full list of services*)

- Cultural humility and diversity, equity, and inclusion workshops
- Linguistically Responsive Instructional Practices workshops and Universal Design for Learning trainings
- Remote and on-site technical assistance
- Regional IEP Labs
- Online compliance trainings learning management system



School Year 2018-2019 Membership Services

We believe that strong, high-quality student supports coupled with strong, thoughtful systems are critical to creating a truly inclusive and compliant school environment. Thus, the True Measure Collaborative (TMC) is proud to partner with Seneca Family of Agencies to offer 50% discounts to schools on Unconditional Education services with Seneca. Charter Management Organizations receive a 35% discount on each additional school that participates in the TMC. Schools must be a member of the TMC to contract with Seneca and a WA Charters member to join the TMC.

Services	Non-Puget Sound Area Schools \$8,000	Puget Sound Area Schools \$12,000
PROGRAM SPECIALIST SUPPORT		
Monthly regional IEP Labs focused on a specific portion of IEP compliance. Attendance to 3 or more earns clock hours		✓
Monthly school file review aligned to WISM specific audit areas such as LRE and Adverse Impact Statement. School selects files for review.		✓
Quarterly "deep dive" review into special education files using the OSPI developed IEP and Evaluation File Review Form		✓
Assistance in preparing OSPI IDEA and TBIP applications and reporting forms for submission		✓
Monthly regional office hours, including special hours targeted to specific timely needs (e.g. applying for safety net funding)		✓
On-site technical assistance for targeted supports responsive to student, staff, and systems needs. Charter Management Organizations can use these hours flexibly across multiple sites.	5 hours / quarterly	5 hours / month
Remote technical assistance for processes and procedures and student-specific compliance	5 hours / month	5 hours / month
On-call support and guidance for pre-legal intervention	✓	✓
HIGH-QUALITY, TIME-SAVING RESOURCES		
Monthly newsletter featuring Washington and federal Special Education compliance updates, resources, and professional development opportunities	✓	✓
Assistance in selecting contracted supports (e.g. physical therapy, occupational therapy, speech-language pathology)	✓	✓
E-Library of curated templates for data and service tracking (e.g. Washington-specific IEP Online handbook, ELL Resources)	✓	✓
Library of assessment materials (e.g. Woodcock Johnson, BASC-3, DAS-II) for check-out (approximately \$28,000 total value)	✓	
VALUABLE PROFESSIONAL DEVELOPMENT		
Summer Institute, a multi-day shared learning opportunity to prepare strong systems, protocols, and practices for the school year ahead	One attendee	Up to two attendees
Student Support Professional Learning Community for cross-disciplinary staff focused on improving student outcomes through regular data-based intervention cycles	One attendee	✓
Regional workshops provided by experts in areas such as PBIS, Physical Restraint, and Trauma-informed Education	4 registrations / year	6 registrations / year
Curated, on-site workshops for school staff provided by experts in areas such as Crisis Intervention, Autism 101, Accommodations 101	1 workshop / year	2 workshops / year
Curated, on-site Universal Design for Learning workshops provided by WA Charters	1 workshop / year	2 workshops / year
On-site English Language Proficiency Standards and Linguistically Responsive Instructional Practices training, incorporating Project GLAD and SIOP strategies	1 workshop / year	1 workshop / year
On-site Diversity, Equity, and Inclusion workshops provided by Seneca Family of Agencies focused on cultural humility	2 workshops / year	3 workshops / year
Online Compliance Training Platform featuring required and recommended health and safety, civil rights, Section 504 and cultural competency trainings for school staff	✓	✓
Submission for up to \$2000 in travel and lodging for TMC professional development participation	✓	

2018-2019 SENECA PARTNERSHIP OFFERINGS

SENECA DIRECT SERVICES BILLING RATES				
Position	Hourly Rate	Part-Time (per .2 FTE)	Full Time Rate	ESY: Full Time Rate
Academic Intervention Specialist (AIS)	\$105	\$21,000	\$100,000	\$7,692
Culture & Climate Specialist/Coach	\$105	\$21,000	\$100,000	\$7,692
Program Manager	N/A	N/A	\$104,500	\$8,038
Clinical Intervention Specialist (CIS)	\$100	\$20,000	\$95,000	\$7,308
Student Support Counselor (SSC)	\$81	\$16,200	\$77,000	\$5,923
School Psychologist	\$138	\$27,300	\$130,000	\$10,000
BCBA	\$125	\$24,800	\$118,000	\$9,077
Speech and Language Therapist	\$125	\$24,800	\$118,000	\$9,077
Occupational Therapist	\$125	\$24,800	\$118,000	\$9,077
Physical Therapist	\$125	\$24,800	\$118,000	\$9,077
Nursing	\$95	N/A	N/A	N/A
Translation/Interpretation Services	\$50	N/A	N/A	N/A

TMC MEMBERSHIP BENEFITS
As TMC members, Puget Sound charter schools are eligible to contract for Seneca services, AND:
<ul style="list-style-type: none"> All TMC member schools are eligible for a 50% discount on the cost of preventative, UE services (Culture and Climate Specialist/Coach; Clinical Intervention Specialist; Reset Counselor) TMC member schools with at least one full-time UE staff member receive full access to Seneca's Interschool Response Team (more information below) TMC member schools committed to the Unconditional Education model receive access to the UE services-as-needed reserve fund (more information on back)

INTERSCHOOL RESPONSE TEAM
All schools committed to a full-time UE staff person on campus have access to:
Online referral completion for immediate student support needs (response within 24 hours)
COST meeting with school and interschool response team to assess needs and create action plan
1 week check in on action items from COST process
4-8 week progress update on interventions
Potential for up to one week of assessment or stabilization services

UNCONDITIONAL EDUCATION MODEL

To support schools interested in implementing a holistic, trauma-informed schoolwide approach, Seneca will maintain a services-as-needed reserve fund. Schools will have access to this fund if they commit to the following elements of the UE model:

Participation in the semiannual UE culture and climate assessment process

Participation in an annual staff and family (Tier 2/3) survey re: satisfaction with Seneca services

Implementation of the UE Coordination of Services Team process

At minimum, quarterly UE-themed professional development activities for all school staff

At minimum, biweekly meeting between designated school and Seneca leadership team members

RESET COUNSELOR**Description:**

\$77,000 for school year

Provides whole-school, trauma-informed support

Responds to teachers' requests for out-of-class "resets" to help students to re-engage successfully

Intervenes proactively with identified students/classrooms to avoid loss of instructional time

Facilitates restorative work between students and staff prior to classroom reintegration

Completes documentation of services provided, including minute-by-minute data tracking to inform decision-making

Participates in COST process

CLINICAL INTERVENTION SPECIALIST**Description:**

\$95,000 for school year

Provides therapeutic interventions, school support and case management for a caseload of students (can include individual, family, and group work)

Provides teacher coaching, modeling, and development to support integration of students with mental health needs into the school setting

Works collaboratively with school staff to implement research-based interventions to align to the three tiers of intervention, from SEL learning to intensive intervention

Facilitates trainings and professional development on mental health and trauma-informed practices

SCHOOL CULTURE AND CLIMATE SPECIALIST/COACH**Description:**

\$100,000 for school year

Leads a transdisciplinary culture and climate committee in creating and executing an annual culture and climate plan based on school specific needs

Facilitates the Coordination of Services Team (COST) to oversee referral of students requiring support, timely implementation of interventions, the progress monitoring of students receiving interventions, and the evaluation of intervention effectiveness

Supports school operations, including support structuring transitions, mealtimes, student transportations, and during special events, crises or field trips

Provides ongoing support in shoring up school-wide systems to ensure all students can be successfully served within intentional, rigorous, and inclusive learning environments



Catalyst: Bremerton

Section 16: Attachment 14

Contents:

- Julie Kennedy, Board Chair, Resume and Information Form
- Amy Kiyota, Board Vice-President, Resume and Information Form
- Katie Singh, Board Member, Resume and Information Form
- TyKera Williams, Board Member Resume and Information Form

Experience CHARTER SCHOOL GROWTH FUND

CSGF identifies the country's best charter schools, fund their expansion, and help to increase their impact.

2018- Executive in Residence, Academics and Character Practice Lead

Current Partner with academic and character leaders across the portfolio of schools to identify and invest in scalable solutions to common issues. Facilitate shared learning across the portfolio and support programmatic growth across the portfolio.

RELAY GSE

Relay is a national, accredited nonprofit institution of higher education serving 2000 teachers and 400 leaders across the US.

2015- Senior Dean, Academic Programs

2018 Leads the development and ongoing evolution of Relay's rigorous teacher training program.

Key Achievements

- Led development of teacher training content related on Computer Science, Bilingual Education and Personalized Learning
- Led launch of institutional partnership and development of Corps Member Summer Institute in Delaware and NYC
- Restructured curriculum design processes to more seamlessly integrate design team and teaching faculty
- Led data-driven redesign of course structure and assessment system

UNCOMMON SCHOOLS

Uncommon Schools starts and manages outstanding urban charter public schools that close the achievement gap and prepare low-income students to graduate from college. Uncommon Schools was awarded the Broad Prize for Charter Management Organizations in 2013.

2012-2015 Managing Director, NYC Middle Schools and High Schools

Responsible for the growth and performance of Uncommon NYC's twelve middle schools and three high schools employing 350 staff serving over 3,800 students.

Academic Results

- 100% of Uncommon Charter High School's graduating seniors have earned acceptances to 4-year colleges and universities. 93% of UHCS graduates are currently enrolled in a 4-year college
- UCHS seniors earned an average SAT score of 1608 surpassing the white student national average of 1577.
- In 2013-14, 67% of Uncommon NYC juniors and seniors sat for at least 1 AP exam and 51% of those students scored a level 3 on at least one exam
- On 2013-14 NYS Exams, Uncommon NYC Middle School students in grades 5-8 reversed the achievement gap in Math by 8 percentage points
- On the 2013-14 NYS Exams, four Uncommon NYC middle schools scored in the top 20 of all 2000+ NYS schools on the NYS 8th Grade Math exam. All Uncommon NYC middle schools scored in top the 8% of NYS schools
- On the 2013-14 NYS Exams, Uncommon NYC 8th graders reversed the achievement gap in ELA by 2 percentage points
- 72% of Leadership Prep Bed Stuy Middle Academy 8th grade students earned advanced or proficient on the 8th grade exam, far exceeding the NYS white student average of 44%
- All Uncommon NYC Middle Schools 8th grades outperformed their districts, the city and NYS on the NYS ELA exam

Key Achievements

- Led regional expansion from nine schools to fifteen schools
- Coached and managed instructional leaders and regional leaders on developing strong instructional systems, responding to data, leading teams, establishing positive staff and student culture and developing their own leaders
- Led creation and implementation of instructional shifts in response to adoption of Common Core Standards, including: structures of class for ELA and Math classes, scope and sequence and daily lesson -plans, summer and yearlong PD for teachers in all content areas, state exam preparation and curricular and cultural walkthroughs
- Led 12 person regional team through annual strategic planning process related to all operational, instructional and cultural initiatives and led 16 school-based instructional leaders in school-based strategic planning
- Facilitated 5-12 Math Taxonomy working group to design Common Core aligned instructional and curricular systems. Designed and led Uncommon-wide leader and teacher PD on 5-12 Math taxonomy

- ☐ Participated in Managing Director Working Group on effective principal coaching and management
- ☐ Co-designed and facilitated PD on Powerful Staff Culture for school leaders

2011-2012 **Associate Managing Director, NYC Elementary Schools**

Responsible for the growth and performance of Uncommon NYC's five elementary schools.

Key Achievements

- Designed quarterly professional development for principals, instructional leaders and deans of students
- Created and led implementation of systems to support and build staff culture in each school
- Redesigned k-4 math Interim Assessments to respond to shifts in Common Core and the NYS Math Exams

2005 - 2011 **WILLIAMSBURG COLLEGIATE CHARTER SCHOOL, UNCOMMON SCHOOLS** Brooklyn, NY

A high performing college preparatory, public, charter middle school serving 300 students in grades 5-8 with a waitlist of over 800 students. WCCS consistently ranked in the top two charter schools, the top five public middle schools, and the top twenty middle and elementary schools out of 1500+ schools based on the NYC Department of Education Progress Reports.

Founding Principal

Responsible for all aspects of the school environment – educational policy and methods, school operations, instructional staff professional and leadership development, student enrichment and discipline, overall school culture and family involvement and communication.

Academic Results

- By 2015, 71% of 8th grade graduates were enrolled in a 4-year college
- 7th and 8th grade students were ranked #1 in NYS with 100% of students earning advanced or proficient on the 2010-2011 NYS 7th and 8th Grade Math exam. 8th grade students were ranked #5 in the state of students earning advanced
- Students closed the gap and outperformed NYS white students in grades 5-8 Math and in grades 7-8 ELA on the 2010-11 NYS exam

Key Achievements

- Designed and grew the school's leadership team from principal and director of operations in the first years to a team of five and added four grade level leaders and three instructional leaders to provide better support structures for staff and students
- Coached three Hollyhock Instructional Fellows in their residency years prior to opening their schools
- Hosted over 250 visitors to Williamsburg Collegiate including school leaders, boards and leadership teams, district administrators, foreign education consultants, potential donors and prospective board members
- Participated in NPR's Talk of the Nation to discuss the implementation of Teach Like a Champion by Doug Lemov

2004-Present **School Leader Coaching and Professional Development**

Provided short-term and long-term coaching for school leaders focusing on strategic planning, teaching coaching, developing instructional and cultural systems, and developing leaders

- | | |
|--|---|
| <input type="checkbox"/> Caliber Schools, CA | <input type="checkbox"/> Green Dot Public Schools, WA |
| <input type="checkbox"/> TenSquare, NV | <input type="checkbox"/> The Prep Schools, OH |
| <input type="checkbox"/> Equitas Academy Charter Schools, CA | <input type="checkbox"/> RePublic Schools, TN |
| <input type="checkbox"/> Alma Del Mar Charter School, MA | |

Created and delivered professional development around building and maintaining staff culture, pedagogical techniques and best practices and components of effective school leadership for

- | | |
|--|---|
| <input type="checkbox"/> Teach for America NY | <input type="checkbox"/> WA Charter Schools Association |
| <input type="checkbox"/> NYC Teaching Fellows | <input type="checkbox"/> Schools that Can, Milwaukee |
| <input type="checkbox"/> New Schools for New Orleans | <input type="checkbox"/> UP Academies, Massachusetts |
| <input type="checkbox"/> Building Excellent Schools | <input type="checkbox"/> Young Women's Leadership Network |

Education HARVARD UNIVERSITY, John F. Kennedy School of Government Cambridge, MA

Masters in Public Policy in Human Resources, Labor and Education, May 2005

Chairperson of the Social Policy Professional Interest Council (2003 – 2005)

Salem, OR

WILLAMETTE UNIVERSITY

Bachelor of the Arts, Chemistry, May 1999

Recipient of the Young Alumni Leadership Award (2009), Senior Key (1999), Colonel Percy Willis Prize (1999), Greek Woman of the Year (1999), Webber Scholarship (1998)

Julie Kennedy

CHARTER SCHOOL BOARD MEMBER INFORMATION FORM

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To be completed individually by each proposed charter school board member.
All forms must be signed by hand.

Serving on a public charter school board is a position of public trust and fiduciary responsibility. As a board member of a public school, you are responsible for ensuring the quality of the school program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, Washington State Charter School Commission (Commission) requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold:

1. To give application reviewers a clearer introduction to the applicant team behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and
2. To encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

Background

- | | |
|---|---|
| 1. Name of charter school on whose Board of Directors you intend to serve | <u>Catalyst: Bremerton</u> |
| 2. Full name | <u>Julie Kennedy</u> |
| Home Address | <u>117 NW 82nd Street Seattle WA 98117</u> |
| Business Name and Address | <u>Charter School Growth Fund, Broomfield, CO</u> |
| Phone Number | <u>917-617-2724</u> |
| E-mail address | <u>Julie.trott@gmail.com</u> |

3. Brief educational and employment history. (No narrative response is required if resume and professional bio are attached.)

x ☐ Resume and professional bio are attached.

4. Indicate whether you currently or have previously served on a board of a school district, another charter school, a non-public school or any not-for-profit corporation (to the extent not otherwise indicated in your response to Item 3, above).

x ☐ Does not apply to me. ☐ Yes

5. Why do you wish to serve on the board of the proposed charter school?

I believe that all parents, regardless of their economic ability, should have the right to choose the right school for their child. In many communities, families exercise choice when choosing a home in the neighborhood or zone for the best school. For a variety of reasons, many families are not afforded that same luxury. Charter schools exist to provide another option for families. I believe this school will afford students and families with more than a choice- but a place for a fresh start or to find the community that will help them realize their potential.

6. What is your understanding of the appropriate role of a public charter school board member?

I understand that the board is responsible for managing the CEO and providing oversight on all issues of governance. As a former instructional leader, I look forward to providing guidance related to instruction and curricula choices in the school.

7. Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.

I served as a school leader and network leader for a large charter management organization, Uncommon Schools, in Brooklyn, NY. In my various roles, I reported to the board and understood the oversight they provided to me and our work.

8. Describe the specific knowledge and experience that you would bring to the board.

As a former middle school principal and principal manager, I bring a practical knowledge on developing school culture, coaching teachers, curriculum and instruction.

School Mission and Program

1. What is your understanding of the school's proposed educational program?

Catalyst: Bremerton aims to develop strong instructional practices across the school through intentional and rigorous professional development for teachers. Teachers will use standards-aligned and rigorous curricula to facilitate learning. The school team will use data to regularly monitor student

progress and will respond to address gaps in understanding.

2. What do you believe to be the characteristics of a successful school?

Successful schools have a clear vision for how they will fulfill their mission and a practical and detailed strategy on how they will realize their vision. When running a school, there are a million tiny details to consider and the best schools I've seen plan to ensure that each of those tiny details is aligned to the vision. These tiny details include everything from operational logistics for how students will move throughout the day to annual strategic planning processes that ensure that the entire organization is on the same page about key priorities for each year.

3. How will you know that the school is succeeding (or not) in its mission?

We will clearly define the metrics aligned with the mission as a board, however, from my perspective we will know that the school is succeeding if: 1) we are fully enrolled which would reflect that we are building a school that is truly responding to what the community is looking for, 2) students are making academic growth and closing opportunity gaps with their more affluent peers, 3) students are growing in the soft skills necessary to be changemakers and 4) staff culture is strong reflecting that we're doing all of the first three while building a positive and thriving place for educators to work and grow.

Governance

1. Describe the role that the board will play in the school's operation.

The board will serve as an accountability partner to the co-founders. The board will assist in setting annual goals and monitoring progress towards those goals. The board will provide advice and counsel on challenging questions related to big picture strategy or budgeting. Ultimately, the board will ensure that the co-founders and staff are operating in way that upholds the vision and values of the school.

2. How will you know if the school is successful at the end of the first year of operation?

As described above, as a board we will set specific metrics and targets for the first year and beyond. This will include being fully enrolled (with a waitlist indicating parent and family demand for the opportunity), student/family/staff satisfaction as evidenced by survey results and students demonstrating at least one year's growth in core academic courses.

3. How will you know at the end of four years if the school is successful?

Beyond the outcomes outlined above, we would want to see strong teacher retention year over year to help maintain a consistent and stable learning environment for students. Similarly, strong year over year student retention reflecting family and student satisfaction with the opportunity.

Additionally, we would know we were successful if we see increased interest in other Washington communities for us to open schools.

4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?

We will need to set clear metrics and set dates for when we will review the related data. As a board, we will also need to determine our strategy for supporting the school if performance is falling below or not progressing the way we expected.

5. How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?

I would first share my concerns with the Catalyst:Bremerton co-founders for advice and a second opinion before raising to the rest of the board. I would then initiate a conversation with the rest of the board. Already at this point, we are developing skills and trust as a board to engage in open and honest conversation. I trust that we, as a board, will continue to build the skills necessary to address a potential situation like the one described above.

Disclosures

1. Indicate whether you or your spouse knows the other prospective board members for the proposed school. If so, please indicate the precise nature of your relationship.

X ☐ I / we do not know any such trustees. ☐ Yes

2. Indicate whether you or your spouse knows any person who is, or has been in the last two years, a school employee. If so, indicate the precise nature of your relationship.

X ☐ I / we do not know any such employees. ☐ Yes

3. Indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the charter school (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the school.

X ☐ I / we do not know any such persons. ☐ Yes

4. Indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the school. If so, indicate the precise nature of the business that is being or will be conducted.

X ☐ I / we do not anticipate conducting any such business. ☐ Yes

5. If the school intends to contract with an education service provider or management organization, indicate whether you or your spouse knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship.
 X ☐ Not applicable because the school does not intend to contact with an education service provider or school management organization.
☐ I / we do not know any such persons. ☐ Yes

6. If the school contracts with an education service provider, please indicate whether you, your spouse, or other immediate family members have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.
 X ☐ N/A. ☐ I / we have no such interest. ☐ Yes

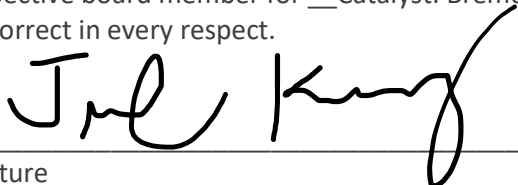
7. If the school plans to contract with an education service provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.
 X ☐ N/A. ☐ I / we or my family do not anticipate conducting any such business. ☐ Yes

8. Indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.
 X ☐ Does not apply to me, my spouse or family. ☐ Yes

9. Indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board.
 X ☐ None. ☐ Yes

Certification

I, Julie Kennedy, certify to the best of my knowledge and ability that the information I am providing to the Washington State Charter School Commission as a prospective board member for Catalyst: Bremerton Charter School is true and correct in every respect.



Signature

2/10/19

 Date

Amy Kiyota

4824 S. Kenny Street Seattle, WA 98112 | T: 443.934.8705 | E: amy.kiyota@gmail.com

Experience

Manager of Finance and Operations – Impact Public Schools

Tukwila, WA—2018 – Present

Manage finance and operations for a growing charter school network in its first year of operation; develop new systems to support operational excellence; and complete state and federal compliance requirements.

Director of Operations—Leadership Prep Brownsville Middle Academy, Uncommon Schools

Brooklyn, NY—2016 – 2018

Co-led high performing charter middle school in Brownsville, Brooklyn; created and implemented processes and systems for school operations including HR, finance, enrollment, government compliance, technology, and facilities; project managed construction to add new classrooms and all new initiatives and special projects at the school; directly managed a team of 3 operations associates and 30+ instructional staff; leveraged data to increase academic results (ELA and math) by 10% and increase staff satisfaction by 50%.

Managing Director of Development—Connecticut & New York, Educators 4 Excellence

New York, NY & New Haven, CT — 2014 – 2016

Led efforts to build and steward relationships with funders (individual, corporate, and foundation) through grant process management, donor and education stakeholder relationship management, and a campaign to raise \$1.1 million to support program and operations in CT; provided operational oversight & strategic guidance for the chapter.

CPRL Student Consultant, Center for Public Research and Leadership, Columbia Law School

New York, NY— 2013 – 2014

Created a custom school performance framework for an urban public school district to measure and support district schools and served as a policy advisor for the leader of a turnaround public school district focused on reducing litigation risk in the areas of human capital and real estate during a restructuring.

Executive Director, Governor's Advisory Commission on Asian American Affairs

Philadelphia, PA — 2011– 2013

Served as public liaison for the Asian American Pacific Islander (AAPI) community and State of Pennsylvania at events, meetings, and community gatherings on business development and voter registration initiatives; directed and managed the Commission, consisting of 17 AAPI community leaders, to build coalitions connecting the AAPI community to state resources.

Development & Marketing Manager, Asian Arts Initiative

Philadelphia, PA — 2011

Developed marketing materials including press releases, funder reports, e-newsletters, website content, and strategic plans; coordinated events and wrote grants leading to \$1.1 million in contributions per annum; supported board initiated special projects, and supervised and on-boarded new team members and volunteers.

ArtsRising Program Assistant, Philadelphia Education Fund

Philadelphia, PA — 2010 – 2011

Managed program operations and data systems; organized teachers and stakeholders to promote collaboration; coordinated events to raise \$1 million; measured program impact with research consultants, WolfBrown, and developed campaign messaging in partnership with Blue State Digital.

Research & Communications Fellow, Philadelphia Education Fund, Philly Fellows, AmeriCorps VISTA

Philadelphia, PA — 2009 – 2010

Created metrics to evaluate the Fund's 11 programs; developed materials to quantify and share the Fund's impact; assisted the development team with grant writing, publication editing, and event planning and management to raise \$8 million per year.

Education

Teachers College, Columbia University

M.A. Economics and Education — 2013 – 2014, GPA: 3.85/4.0

Ursinus College

B.A. East Asian Studies, minors in Education and Japanese — 2005 – 2009, GPA: 3.95/4.0

Summa Cum Laude, Phi Beta Kappa. Studied at the International Christian University for one year in Japan.

Skills

Microsoft Office, Salesforce, SPSS, PowerSchool, Asana, and Intermediate Japanese



CHARTER SCHOOL BOARD INFORMATION FORM

To be completed individually by each proposed charter school board member.

All forms must be signed by hand.

Serving on a public charter school board is a position of public trust and fiduciary responsibility. As a board member of a public school, you are responsible for ensuring the quality of the school program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, Washington State Charter School Commission (Commission) requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold:

1. To give application reviewers a clearer introduction to the applicant team behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and
2. To encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

Background

1. Name of charter school on whose Board of Directors you intend to serve

Catalyst Public Schools

2. Full name

Amy Kiyota

Home Address

4824 S. Kenny Street Seattle, WA 98112

Business Name and Address

Impact Public Schools 3438 148th Street Tukwila, WA 98168

Phone Number

(443) 934 - 8705

E-mail address

Amy.kiyota@gmail.com

3. Brief educational and employment history. (No narrative response is required if resume and professional bio are attached.)

☒ Resume and professional bio are attached.

4. Indicate whether you currently or have previously served on a board of a school district, another charter school, a non-public school or any not-for-profit corporation (to the extent not otherwise indicated in your response to Item 3, above).

☒ Does not apply to me. ☐ Yes

5. Why do you wish to serve on the board of the proposed charter school?

I believe that all families should have a high-quality school option for their students. With appropriate accountability structures, charter schools can provide additional choices for families to make the best decision for their family. Furthermore, I am invested in Catalyst's specific focus on inclusive practices for students who may need additional supports—students who are defined as at risk.

6. What is your understanding of the appropriate role of a public charter school board member?

As a board member, I will contribute to the management of the CEO and help oversee the financial, legal, and other key operational matters such as fundraising, board member recruitment, and strategic decision-making. My understanding is that the board is the governing body of the school.

7. Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.

I have worked in the public sector for the last decade, spent two years as a school leader of a charter school in Brooklyn, NY, and currently work at a public charter management organization in Washington. I believe that my experience working in partnership with boards in various nonprofits across the country and charter school experience will make me an effective board member.

8. Describe the specific knowledge and experience that you would bring to the board.

As I mentioned above, I have led schools and organizations. In addition to staff management, I also have a strong background in school based operations and fundraising.

School Mission and Program

1. What is your understanding of the school's mission and guiding beliefs?

My understanding is that the school's guiding beliefs are that all students, regardless of their background or who they are, deserve an excellent education that prepares them for success in college and beyond. Catalyst aims to support a diverse student body to find purpose and develop skills essential to success beyond school and to be change-agents in their communities.

2. What is your understanding of the school's proposed educational program?

Catalyst's model provides students with the culturally-responsive, rigorous and supportive academic environment necessary for them to be successful. Catalyst aims to prioritize serving "at-risk" scholars through intentional recruitment throughout low-income portions of the county and by having lottery

preferences to prioritize these scholars.

3. What do you believe to be the characteristics of a successful school?

A successful school has a few key characteristics—joyous and rigorous instruction; caring adults; data-driven decision making; and a focus on serving all students, including those with special needs. With these key characteristics complimenting one another, a school will be a safe space for students to develop and learn.

4. How will you know that the school is succeeding (or not) in its mission?

We will know that the school is succeeding in its mission if we see full enrollment, families are engaged with programming and volunteering opportunities, teachers can identify that they are growing and developing, and students are achieving on a diversity assessments. Furthermore, if we are able to see

Governance

1. Describe the role that the board will play in the school's operation.

The board will hold the school leaders accountable to the mission and goals of the school. We will do this by checking on progress towards our goals and mission, ask strategic questions, monitor and approve the organizational financial transactions. The board will also serve as models for the school's values and that this is reflected across the organization.

2. How will you know if the school is successful at the end of the first year of operation?

We will know if the school is succeeding in its mission if we are 1) able to meet our enrollment targets and have a robust waitlist; 2) attract a diverse, mission-aligned, high quality staff; and 3) Catalyst students are growing academically.

3. How will you know at the end of four years if the school is successful?

Similar to the indicators we will see at the end of the first year of operation, we will know if the school is succeeding in its mission if we are 1) able to meet our enrollment targets and have a robust waitlist; 2) attract and retain a diverse, mission-aligned, high quality staff; and 3) Catalyst students are academically performing within the top 10% of school districts in the state.

4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?

We have the very important job of holding the staff and ourselves accountable and also working with our authorizer and other accountability structures to ensure that the school is successful. Accountability is a key component of a strong school.

5. How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?

We will discuss this matter directly and quickly as a board and notify the CEO about the situation. It is critical that members of Catalyst's board are always acting ethically and with the best interest of the

students and families at heart. We will strive to hold one another accountable, be honest, and ensure that we are supporting the achievement of the school's mission.

Disclosures

1. Indicate whether you or your spouse knows the other prospective board members for the proposed school. If so, please indicate the precise nature of your relationship.
☒ I / we do not know any such trustees. ☐ Yes

2. Indicate whether you or your spouse knows any person who is, or has been in the last two years, a school employee. If so, indicate the precise nature of your relationship.
☒ I / we do not know any such employees. ☐ Yes

3. Indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the charter school (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the school.
☒ I / we do not know any such persons. ☐ Yes

4. Indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the school. If so, indicate the precise nature of the business that is being or will be conducted.
☒ I / we do not anticipate conducting any such business. ☐ Yes

5. If the school intends to contract with an education service provider or management organization, indicate whether you or your spouse knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship.
☒ Not applicable because the school does not intend to contact with an education service provider or school management organization.
☒ I / we do not know any such persons. ☐ Yes

6. If the school contracts with an education service provider, please indicate whether you, your spouse, or other immediate family members have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.
☒ N/A. ☒ I / we have no such interest. ☐ Yes

7. If the school plans to contract with an education service provider, indicate if you, your spouse or

other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.

☒ N/A. ☒ I / we or my family do not anticipate conducting any such business. ☐ Yes

8. Indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.

☒ Does not apply to me, my spouse or family. ☐ Yes

9. Indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board.

☒ None. ☐ Yes

Certification

I, Amy Kiyota, certify to the best of my knowledge and ability that the information I am providing to the Washington State Charter School Commission as a prospective board member for Catalyst Public Schools Charter School is true and correct in every respect.



Signature

2/1/19

Date

KATIE SINGH

3908 Briarcliff Lane West Seattle, WA 98199 • (415) 722-1434
katiesingh10@gmail.com

PROFESSIONAL EXPERIENCE and ACCOMPLISHMENTS

Urban Schools Human Capital Academy (USHCA)

March 2012-Present

DIRECTOR OF LEADERSHIP DEVELOPMENT (NOV2017 – PRESENT)

- *Academy– USHCA's flagship Program for senior level HR education leaders*
 - Lead the design and development of the content and curriculum and serve as lead facilitator
 - Manage a team of eight to deliver bi-annual Academies of 60 plus participants.
- *Emerging Human Capital Leaders Program – Program to support emerging HR leaders in education*
 - Co-manage the overall program of 30 participants
 - Lead the design and delivery of content at 2 convenings per year.

PARTNER

- *Content Development:*
 - Co -lead design and delivery of curriculum for Emerging Human Capital Leaders Initiative
 - Facilitate biannual in-person sessions with 30 participants.
 - Facilitate 5-6 virtual sessions per year.
 - 90% of participants rated content as effective or highly effective.
 - Support development of curriculum for Academy Program for district HR leaders
- *Consulting Services:*
 - Advise and coach senior HR leaders at Seattle Public Schools on human capital strategy and improvement efforts.

FELLOW

- *Consulting Services:*
 - Provided strategic coaching and on-site support to 6 USHCA districts' HR staff on the strategic management of human capital within their district, focused on use of data.
 - Key deliverables: Vacancy Trackers/Databases for Atlanta Public Schools and Seattle Public Schools, School Partner Retreat design in Denver Public Schools, Interview Guides for Prince Georges County Public Schools.
- *Content Development:*
 - Developed and delivered curriculum and materials for 6 in-person Academies of 40+ participants, with a focus on understanding and using data.
- *Organizational Support:*
 - Co-led the data strategy for USHCA to ensure the organization is meeting key goals and targets with district partners, including designing and leading quarterly data reviews with USHCA staff.

New York City Department of Education (DOE), Division of Talent, Labor & Innovation

NYC, NY

SENIOR DIRECTOR, OFFICE OF SCHOOL LEADER EFFECTIVENESS

2011-2012

- Designed and managed pilot for 30 principals and 7 superintendents to implement new principal performance review process that was eventually scaled citywide.
- Led re-design of New York City's process for assessing potential principal candidates.
- Managed team of 2-a Senior Manager and a Director.

PRODUCT DEVELOPMENT DIRECTOR, PRODUCT DEVELOPMENT GROUP

2009-2011

- Led product design and development of the district's first competency-based Learning Management System to deliver individualized learning to all teachers and school leaders in NYC.
 - Managed \$4 million contract with two vendors
 - Led four cross-functional teams: technical, functional, content and implementation
 - Directly supervised 2 full-time project managers and 1 technical consultant

- DIRECTOR OF STRATEGIC ANALYSIS, DIVISION OF FIELD AND INFORMATION SERVICES 2008- 2009
- Designed & implemented Human Capital Profile, comprised of school-level talent data, for all principals and their support teams; managed user requirements and training for users.
 - Developed and implemented New York City's first Teacher Exit Survey (2008); analyzed and reported results to Chancellor's Cabinet and United Federation of Teachers (UFT).
 - Managed the development and implementation of yearlong training program for 60 HR Directors focused on using talent data for strategic decision-making.

The World Bank Washington, DC
JUNIOR PROFESSIONAL ASSOCIATE, HUMAN DEVELOPMENT, EAST ASIA AND PACIFIC REGION 2005-2007

- Supported design, implementation and supervision of education sector operations in Mongolia:
 - Identified project concept and components.
 - Supervised project implementation via regular visits to country.
 - Ensured proper monitoring of operations as per established indicators.
 - Designed evaluations to measure impact of programs.
- Supported policy dialogue and dissemination of analytical work to education counterparts in Mongolia, Vietnam and Cambodia:
 - Publications: Co-author, *Public Financing of Education in Mongolia: Equity and Efficiency Implications* (The World Bank, September 2006), Co-author, *Vietnam: Higher Education and Skills for Growth* (The World Bank, June 2008), and Education Chapter, *Mongolia Public Expenditure and Financial Management Review*, (The World Bank, January 2009).

UNIVERSITY OF CALIFORNIA, SAN DIEGO San Diego, CA
GRADUATE TEACHING ASSISTANT, Quantitative Methods & Statistical Analysis I and II 2004-2005

EDISON SCHOOLS East Palo Alto, CA
KINDERGARTEN TEACHER, Brentwood Academy 2001-2002

SCHOOL FUTURES RESEARCH FOUNDATION East Oakland, CA
FIRST GRADE TEACHER, EC Reems Academy 2000-2001

EDUCATION

UNIVERSITY OF CALIFORNIA, SAN DIEGO (UCSD), SCHOOL OF INTERNATIONAL RELATIONS San Diego, CA
MASTER OF PACIFIC & INTERNATIONAL AFFAIRS, INTERNATIONAL MANAGEMENT Sept 2003-June 2005

- Dean's Fellow 2005: selected by Dean for academic excellence and leadership

UNIVERSITY OF CALIFORNIA, BERKELEY Berkeley, CA
BACHELOR OF ARTS, POLITICAL SCIENCE Class of 2000

OTHER ACCOMPLISHMENTS, HONORS & SKILLS

-
- Member of Pittsburgh Public Schools' Principal Evaluation Technical Advisory Committee, Fall 2013.
 - US Department of Education Peer Reviewer, 2012 and 2013.
 - *Chancellor's Fellow 2011*, New York City Department of Education leadership development program.
 - Project Management Professional (PMP), Project Management Institute, 2009.



CHARTER SCHOOL BOARD MEMBER INFORMATION FORM

To be completed individually by each proposed charter school board member.
All forms must be signed by hand.

Serving on a public charter school board is a position of public trust and fiduciary responsibility. As a board member of a public school, you are responsible for ensuring the quality of the school program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, Washington State Charter School Commission (Commission) requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold:

1. To give application reviewers a clearer introduction to the applicant team behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and
2. To encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

Background

1. Name of charter school on whose Board of Directors you intend to serve

Catalyst Public Schools

2. Full name

Katherine Singh

Home Address

3908 West Briarcliff Lane

Business Name and Address

Seattle, WA 98199

Phone Number

415-722-1434

E-mail address

Katiesingh10@gmail.com

3. Brief educational and employment history. (No narrative response is required if resume and professional bio are attached.)

X Resume and professional bio are attached.

4. Indicate whether you currently or have previously served on a board of a school district, another charter school, a non-public school or any not-for-profit corporation (to the extent not otherwise indicated in your response to Item 3, above).

X Does not apply to me. ☐ Yes

5. Why do you wish to serve on the board of the proposed charter school?

As a parent, I believe in school choice for all families, regardless of income level. Catalyst Public Schools will provide an additional option for families in the Bremerton community, particularly those who may not be satisfied with the way their students are currently being served.

As a former teacher, I know how important great leaders are to schools. I believe in the founding school leaders – Amanda Gardner and Tatiana Epanchin – and the vision and skills they bring to leading Catalyst Public Schools. This includes setting high standards for all students and providing them with differentiated supports needed to achieve, as well as creating a work environment for teachers and staff that is focused on opportunities for growth and continuous improvement.

6. What is your understanding of the appropriate role of a public charter school board member?

My role as a founding Board member is to assure that Catalyst Public Schools is providing a high-quality educational experience for families. In addition, it is our role to ensure the school is following appropriate state and federal regulations and that public dollars are being spent responsibly. In my capacity as a Board member, I will also be responsible for input to the schools' leaders and advising them on challenges and opportunities for the school.

7. Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.

Through my work with large school districts and charter management organizations, I have learned how system leaders work with their school boards to provide information and seek their guidance on key decisions.

8. Describe the specific knowledge and experience that you would bring to the board.

For the past six years, I have been supporting HR leaders in school districts, charter management organizations and states across the country. Specifically, I have been supporting these leaders to develop plans and strategies to recruit, develop, and retain effective teachers in their systems. I will

bring HR best practices from across the country to the Catalyst team, with a lens on equity. In my work, I am also focused on building partnerships between HR staff at the district and state levels. I hope to support the Catalyst team in thinking about creative ways they can partner with Bremerton Public Schools to develop a high-quality talent pool for the entire Bremerton community.

School Mission and Program

1. What is your understanding of the school's mission and guiding beliefs?

Catalyst Public Schools' mission is preparing its scholars for college, career, and life. The word scholar instead of student is intentional. It reflects the leadership team's belief in the abilities of EVERY scholar to achieve at high levels and in the development of scholars' leadership skills so they can be change agents for themselves, their families, and their broader community. The school is also focused on equity—ensuring that all scholars get the differentiated supports they need to achieve.

2. What is your understanding of the school's proposed educational program?

Catalyst Public Schools will have high academic expectations for all scholars. All scholars will take rigorous academics across content areas that provide them with mindsets, skills, and habits of mind required to be competitive in college, career, and life. The school is also focused on providing services that meet the social emotional needs of scholars, as well opportunities through curriculum and program to develop scholars' leadership skills and critical consciousness.

3. What do you believe to be the characteristics of a successful school?

A successful school has high standards for all students and teachers and most importantly, students show progress in their academic achievements through assessment data. It provides differentiated supports to students based on their individual needs to achieve these gains, focusing on the social-emotional as well as academic needs of the student. A successful school is also a place where teachers want to work. Leadership supports teachers, and they have ample opportunities to work together to improve their practice. Finally, a successful school builds a sense of community and belonging among families and students.

4. How will you know that the school is succeeding (or not) in its mission?

If Catalyst Public Schools is successful in its mission, then ALL scholars will achieve academically, including students with special needs and English Language Learners. Graduates of the school will be prepared to continue rigorous coursework in high school. There will be demand from families for the school, as evidenced by full enrollment and families will be volunteering and engaged in school activities.

Governance

1. Describe the role that the board will play in the school's operation.

The Board will operate with the mission, value, and core values of the school at the center of its actions. It will ensure that the actions of the school's leadership team align to these values. The Board will serve as an accountability partner to the leadership team and provide oversight and guidance on major projects and milestones in the school's development and ongoing operations.

2. How will you know if the school is successful at the end of the first year of operation?

There will be high teacher retention by the end of the first year. There will also be expanding interest from the community in the school, as evidenced by increased enrollment and demand for additional grades. Families will volunteer at the school and be strong voices in the community for the school. Students will show at least a year's worth of growth on assessments.

3. How will you know at the end of four years if the school is successful?

A continuation of the measures mentioned in question #2 above. On the staffing side, strong supply of teachers and other staff members interested in working in the school as well as opportunities for growth and career advancement starting to take shape within the school. From the operational side, there is a clear plan and funding streams available to continue the schools' growth and expansion into additional grades and school sites.

4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?

Support the school leaders on building support for the school in the community and strategies for ensuring enrollment and recruitment of teachers (charters are new in WA and many are still unclear about these schools, the Board will need to support the school leaders on building support for the school in the community and providing information on charter schools more broadly to ensure their continued support. In addition, the Board will advise on key projects like securing facilities and fundraising necessary to meet needs of growing, new school.

5. How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?

As a Board, we will work in an open and transparent manner and immediately address issues that are unethical or not in alignment with values of the school. We will keep the school's leaders updated on these issues and make sure we are all acting in the best interests of students and their families.

Disclosures

1. Indicate whether you or your spouse knows the other prospective board members for the proposed school. If so, please indicate the precise nature of your relationship.

☐ I / we do not know any such trustees. ☒ Yes

Catalyst Public Schools has organized several opportunities for board members to get to know one another, the school, and the Bremerton community leading up to the submission of this application. My spouse does not know the school leaders or other board members.

2. Indicate whether you or your spouse knows any person who is, or has been in the last two years, a school employee. If so, indicate the precise nature of your relationship.

☒ I / we do not know any such employees. ☐ Yes

3. Indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the charter school (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the school.

☒ I / we do not know any such persons. ☐ Yes

4. Indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the school. If so, indicate the precise nature of the business that is being or will be conducted.

☒ I / we do not anticipate conducting any such business. ☐ Yes

5. If the school intends to contract with an education service provider or management organization, indicate whether you or your spouse knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship.

☐ Not applicable because the school does not intend to contact with an education service provider or school management organization.

☐ I / we do not know any such persons. ☐ Yes

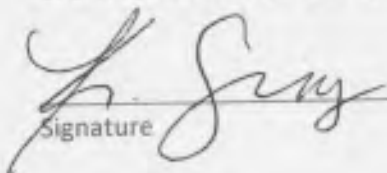
6. If the school contracts with an education service provider, please indicate whether you, your spouse, or other immediate family members have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.

☐ N/A. ☒ I / we have no such interest. ☐ Yes

7. If the school plans to contract with an education service provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.
☐ N/A. ☒ I / we or my family do not anticipate conducting any such business. ☐ Yes
8. Indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.
☒ Does not apply to me, my spouse or family. ☐ Yes
9. Indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board.
☒ None. ☐ Yes

Certification

I, Katherine Singh, certify to the best of my knowledge and ability that the information I am providing to the Washington State Charter School Commission as a prospective board member for Catalyst Public Charter School is true and correct in every respect.


Signature

2/6/2019
Date

TyKera Williams

Bremerton, WA. (410) 463-9857. willi272@seattleu.edu

EDUCATION

Seattle University, Seattle, WA
Master of Social Work

Anticipated June 2019
GPA: 4.00/4.00

Loyola University, Baltimore, MD
Bachelor of Science in Biopsychology

Graduated June 2013

SOCIAL WORK PRACTICUM

University of Washington Medical Center (UWMC), Seattle, WA

Sep 2018 – Present

- Improving health of the public by reducing health disparities in King County, serving the Roosevelt Clinics – the Center for Pain Relief (CPR) and Virology.
- Using exceptional patient-in-environment and family centered -care via accountability, respect, innovation, service and excellence.
- Assisting individuals, families, groups and the treatment teams through the provision of psychosocial assessment, advocacy, education and appropriate referrals and direct evidence-based therapeutic treatment.

Catholic Community Services, Seattle, WA

Sep 2017 – Jun 2018

Pregnancy and Parenting Support (PrePS) Social Work Student-Intern

- Assist clients with appropriate referrals and provide material support, using biopsychosocial-spiritual assessments, ecomaps, pre- and post- data measurement tools.
- Independently facilitate prenatal and parenting classes, for both individuals and couples, who are marginalized, coping with stress, substance abuse and/or domestic violence.
- Co-facilitating a multi-lingual Parenting Education Group for 10 - 12 Asian and Afghan mothers in collaboration with World Relief.
- Engage directly in community outreach to increase community awareness of the organization's presence and contributions.

CASE MANAGEMENT

Compassionate Care, Bremerton, WA

Mar 2016 – Sep 2016

Visitation Supervisor

- Exercised active listening to produce, confidential and objective written descriptions of a child's social system and family engagement.
- Facilitated a safe environment to ensure positive relationships for foster children (0-12 years old) who have been removed from the home.
- Managed a predictable schedule by coordinating time, room space and consistent communication with staff.

YMCA of the Chesapeake, Easton, MD

Jan 2014 – Aug 2014

Assistant Director of Community Engagement

- Systematically processed financial aid resources from seven YMCA facilities that allowed financially marginalized community members to access subsidy for health programs.

RESEARCH

Catholic Community Services, Seattle, WA

Jan 2018 – Jun 2018

Pregnancy and Parenting Support (PrePS) Social Work Student-Intern

- Conducting independent community-based, anti-oppressive qualitative research using a human centered design to address attachment and the effectiveness of culturally relevant services.
- Conducting a practice evaluation of the community-based organization named Capitol Hill Housing along with a cohort of 24 and small group of 2-3 people.

Loyola University, Baltimore, MD

Sep 2011 – Jun 2012

- Designed and conducted a collaborative year-long quantitative psychology research study to explore the effects of marital status and conflict on offspring.
- Analyzed data with correlational design to explore the current relationships of offspring and the social impact of the parental relationship.

COMMUNITY INVLOVEMENT & LEADERSHIP

Catalyst Public Schools Board Member

Sep 2018 – Present

- Serve on the board as a peer voice of the community who seeks to serve those who are systematically left behind their peers by addressing an educational need in Kitsap county.

Society for Social Work Leadership in Health Care (SSWLHC) Member

Aug 2018 – Present

- Responsible for attending monthly board meetings and monthly mentorship meetings.
- Requested to serve on the Communications Committee to develop monthly newsletters.

Families of Color Seattle, Seattle, WA

April 2018 – Jun 2018

Task group

- Collaborating with 2 other task members to design a families of color resource platform for the website and social media.

Catholic Community Services, Seattle, WA

Jan 2018 – June 2018

Pregnancy and Parenting Support (PrePS) Social Work Student-Intern

- Planned and promoted a successful fundraising event including a basket auction, breakfast and client story-telling which generated over \$7,400 in pledges.
- Increased contributions by 60% from the previous annual fundraising event.

Community Day Center for Children, Seattle, WA

Sep 2017 – Present

Parent Volunteer

- Engaging in a series of educational workshops and community reflection that is focused on empowerment strategies to close the achievement gap for ethnically diverse children.
- Supporting child education experience through active participation, 2+ hours a week.

RELEVANT PROFESSIONAL EXPERIENCE

Seattle University, Seattle, WA

Oct 2017 – Present

Social Media Coordinator

Sep 2018 – Present

- Coordinate and create content for the Master of Social Work program's digital media platforms.
- Assist in the development and maintenance of resource lists, accessible to current and alumni students for updates on social work and campus -related events.

Student Administrative Assistant

Oct 2017- Jun 2018

- Accountable for all basic clerical duties including troubleshooting and specialized projects.

- Responsible for information distribution, ordering program materials and maintaining confidential documents.

YMCA of Pierce and Kitsap Counties, Bremerton, WA

Sep 2015 – Apr 2016

Site Director - Pinecrest Elementary School

- Developed a curriculum that produced a 53% increase of children into the program.
- Communicated with 25 or more parents daily, to address the needs and accomplishments of their children.
- Directed a facility that provides before and after care services to 45 students, aged 5-12 years old; and trained staff in accordance to the Washington Administration Code (WAC) and Department of Early Learning (DEL) regulations.

Haselwood Family YMCA, Bremerton, WA

Jun 2015 – Sep 2015

Camp Counselor

- Maintained positive professional relationships with children, parents, staff and supervisors.
- Transformed a given space into a childcare center to strengthen children's (age 4 - 7) social abilities and learning progress according to daily objectives and self-developed curriculums.

YMCA of Greenbrier, Chesapeake, VA

Aug 2014 – May 2015

Site Director – Western Branch Intermediate

- Developed and maintained a state-specific licensed child center without violations.
- Planned, developed and supervised programs for 45 school-aged children ages 4 – 11, which included newsletters, curriculum and holistic early learning development.
- Maintained administrative preservation of participant files, staff lesson plans, program evaluations, staff evaluations (formal and informal).

ADDITIONAL SKILLS & CERTIFICATIONS

- Motivational Interviewing; Cognitive Behavioral Therapy (CBT); Pongo Poetry; Suicide Prevention training; HIPPA; Basic State Training and Registry System (STARS) and Collaborative Institutional Training Initiative (CITI) Program
- Proficient with Microsoft Word, Excel, PowerPoint, Outlook, iMovie; and Social Work Research including International Review Board (IRB) application process
- Actively working towards – Trauma Informed Care; Case Management Training and recertification of Mental Health First-aid

CHARTER SCHOOL BOARD MEMBER INFORMATION FORM

=====

To be completed individually by each proposed charter school board member.
All forms must be signed by hand.

Serving on a public charter school board is a position of public trust and fiduciary responsibility. As a board member of a public school, you are responsible for ensuring the quality of the school program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, Washington State Charter School Commission (Commission) requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold:

1. To give application reviewers a clearer introduction to the applicant team behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and
2. To encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

Background

- | | |
|---|---|
| 1. Name of charter school on whose Board of Directors you intend to serve | <u>Catalyst Public Schools</u> |
| 2. Full name | <u>TyKera Ja'Risse Williams (Cornish)</u> |
| Home Address | <u>3945 NW Fairway Lane</u> |
| Business Name and Address | <u></u> |
| Phone Number | <u>410.463.9857</u> |
| E-mail address | <u>willi272@seattleu.edu</u> |

3. Brief educational and employment history. (No narrative response is required if resume and professional bio are attached.)

☒ Resume and professional bio are attached.

4. Indicate whether you currently or have previously served on a board of a school district, another charter school, a non-public school or any not-for-profit corporation (to the extent not otherwise indicated in your response to Item 3, above).

☒ Does not apply to me. ☐ Yes

5. Why do you wish to serve on the board of the proposed charter school?

I believe in education equity; every child deserves quality education regardless of his/her/their personal or social circumstances. Charters in Washington state intentionally serve children who are systematically underserved. It is necessary for the wellbeing of our students, families and our society at large to reduce the waxing opportunity gap.

- 6. What is your understanding of the appropriate role of a public charter school board member?**

I look forward to establishing a working alliance with my community to design our vision in the best interest of students and families, as my experience is mostly aligned with the holistic wellbeing of students. In addition, I understand that the board is responsible for upholding accountability to both the students and The Commission, providing oversight on the organizational functioning i.e. financial, legal, academic rigor and other operations. This includes but is not limited to, serving on at least one committee – as an advisory body that reports to the full board.

7. Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.

I have less than 1-year experience working in direct board service, however, prior to serving on the Washington State Society for Social Work Leaders in Health Care and the Community Advisory Committee for Seattle University – MSW Program, I served as a Program Director for non-profit organizations for 5 years. In that capacity, I have worked with schools from three separate counties/cities across the US.

- 8. Describe the specific knowledge and experience that you would bring to the board.**

The experience that I have from being a lifelong learner, coordinating programs for school-aged children and navigation from a person-in-environment practice, will help me in this work tremendously. In addition, I have a strong leadership background and experience in navigation of individual, community and organizational systems.

School Mission and Program

1. What is your understanding of the school's mission and guiding beliefs?

Catalyst Public Schools will grow into a system of schools in where the child is a scholar who has the potential to live a full life and succeed at their endeavors. Scholars will be given the opportunity to grow and learn with a small diverse group of peers, so they can cultivate critical consciousness. Scholars will have access to social emotional learning, development of self-worth, mentorship and opportunities for advocacy. Lastly, Catalyst will be a system in which all people – scholars, families, staff and teachers grow and learn in alignment with our mission, so they too can have the agency to act and create change.

2. What is your understanding of the school's proposed educational program?

Scholars will have the opportunity to develop individual and collective leadership skills, as well as develop their own attitudes and emotional regulation skills that are necessary to set goals, succeed and build healthy relationships. Students will have mentors, literacy and math blocks, science and social studies, creative expression i.e. arts and physical education, all of which includes exposure to technology.

3. What do you believe to be the characteristics of a successful school?

There needs to be access to resources, as well emphasis placed on learning styles of scholars and thus, flexible teaching practices. No one scholar is the same and neither are their learning aptitudes, which is why it is imperative for teachers, staff and mentors to meet each scholar where they are and support them in cultivating their success. When an individual is heard, valued and supported he/she/they become actively engaged in the learning process. Ensuring that no groups are over-represented in any area, especially learning provides scholars and the school with the tools necessary for a working alliance.

4. How will you know that the school is succeeding (or not) in its mission?

When the school is fully enrolled with community engagement, family volunteers and students are learning and growing both on formal and informal (ongoing) assessments. Assessments must include grades, community involvement, attendance, discipline, mentorship feedback (both mentors and mentees), all of which should be transcribed into quantitative and qualitative data analyses. When there is demand for more schools and practice models (including but not limited to diversity, inclusion, equity and cultural humility) like the one we create, we know that we have been successful.

Governance

1. Describe the role that the board will play in the school's operation.

The board will serve as accountability partners to the cofounders as well as the Academic Excellence Committee and other advisory committees. The board will also demonstrate a strong commitment to

diversity, equity and inclusion while demonstrating a belief in Catalyst's mission. Additional training in financial oversight, accountability, regulatory compliance, policy i.e. Open Public Meetings Act (OPMA) and the Charter School Act, effective communication, and strategic planning is necessary to greenlight investment decisions and for awareness of progress. Lastly, compliance with all federal, state, local laws and ethical standards.

2. How will you know if the school is successful at the end of the first year of operation?
We will know when the school is successful by the progress of continued assessments, that report high teacher retention, sizeable waitlist for scholars and their families, survey data from all who are involved – teachers, staff, scholars and families.
3. How will you know at the end of four years if the school is successful?
We will know when our mission-aligned staff and teachers remain at the school for three or more years, when our board expansion upholds diverse representation by maintaining at least 50% of members who identify as people of color. When scholars, families and community members are advocating for the continuation of our practices. Lastly, Catalyst scholars will show academic growth and performance within the top 10% of school districts in the state.
4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?
To ensure that Catalyst is successful, transparency, communication and holding us accountable is needed.
5. How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?
If I believed one or more members of the board were acting unethically I would first bring this concern to the individual and/or group of members. And in light of upholding accountability, I would highly encourage the persons to discuss the problematic issues with the board members. Meanwhile the cofounders will be well-informed of the situation and impending action.

Disclosures

1. Indicate whether you or your spouse knows the other prospective board members for the proposed school. If so, please indicate the precise nature of your relationship.
☐ I / we do not know any such trustees. ☒ Yes. *We have met as a group twice.*
2. Indicate whether you or your spouse knows any person who is, or has been in the last two years, a school employee. If so, indicate the precise nature of your relationship.
☒ I / we do not know any such employees. ☐ Yes

☒ None. ☐ Yes

Certification

I, TyKera J. Williams certify to the best of my knowledge and ability that the information I am providing to the Washington State Charter School Commission as a prospective board member for Catalyst Public Schools Charter School is true and correct in every respect.

TyKera J. Williams
Signature

5 Feb 2019
Date



Catalyst: Bremerton

Section 16: Attachment 15

Contents:

- Signed Background Check Statement of Assurance



Initial BACKGROUND CHECK CERTIFICATION

As the duly authorized representative of Catalyst Public Schools, I certify that the background check verification process has been initiated for each board member and school leader and will be completed within the timetables set forth in the Sample Contract: Attachment 1 Pre-Opening Process and Conditions.

I also acknowledge that this is an ongoing obligation and if there is a change in board membership or school leadership the background check verification process must be immediately initiated to ensure compliance with our obligations as a charter public school applicant.

Signed and dated this [date] day of [month and year] in [City], Washington, under penalty of perjury.

Catalyst Public Schools

NAME OF SCHOOL

SIGNATURE OF DULY AUTHORIZED REPRESENTATIVE

Julie Kennedy

NAME OF DULY AUTHORIZED REPRESENTATIVE

1/10/19

DATE



Fingerprint Record Search Screen

Home > Fingerprint Search

Contact Fingerprint Records

First Name: Middle Name: Last Name: Submitted To:
Birth Date: Activity From Date: Activity To Date:

1 Record Found - Show items per page Page: [Export](#)

FingerprintSearchID	Name Birth Date TCN	Cert/ NonCert	Submitted To	WSP Entry Date	WSP Result glossary	FBI Result glossary
9526498	AMY Kiyota 07/10/1967 4202000600328069	Cert	IMPACT PUBLIC SCHOOLS,TUKWILA/SPI CERT 11/14/2018	11/16/2018	Clear 11/15/2018	Clear 11/16/2018

PUGET SOUND ESD
800 OAKESDALE AVE SW
RENTON, WA 98057
425-917-7799

PUGET SOUND ESD

Date: 01/17/2019 12:59:48 PM

CREDIT CARD SALE

VISA
CARD NUMBER: *****8756 S
TRAN AMOUNT: \$83.75
APPROVAL CD: 06697D
RECORD #: 000
CLERK ID: dnicoloudakis
SALES TAX: \$0.00
INVOICE #: FP CATALYST

Thank you!

Customer Copy

Puget Sound ESD
MS KR 01
800 Oakesdale AVE SW
RENTON, WA 98057-5221

Fingerprint Customer
***** , WA *****

DEPOSIT # : 011719CC
RECEIPT # : 1070423

RECEIPT DATE : 01/17/2019
OPERATOR CODE : NICOLDEI000
NAME KEY : FINGERPR000
PAGE NUMBER : 1

INV#/REF	DESCRIPTION	PAYMENT TYPE	ACCOUNT NUMBER	DATE	PAYMENT
RECEIPT	KATHERINE SINGH	CREDIT CARD	01 R 960 7842 13 0000 000 0000 0000 0	01/17/19	44.25
RECEIPT	KATHERINE SINGH	CREDIT CARD	01 R 960 0123 13 0000 000 0000 7844 0	01/17/19	39.50
		* AMOUNT PAID			83.75

Tyler Williams

OLYMPIC ESD 114
105 NATIONAL AVE N
BREMERTON, WA. 98312
360-479-0993

SALE

REF#: 00000006

Batch # 720

01/07/19

16:14:20

APPR CODE: 821036

Trace: 6

VISA

Chip

*****6573

/

AMOUNT

\$75.00

APPROVED

VISA DEBIT

AID: A0000000031010

TVR: 80 80 00 80 00

TS: 68 00

THANK YOU

CUSTOMER COPY



Catalyst: Bremerton

Section 16: Attachment 16

Contents:

- Code of Ethics and Conflict of Interest Policy

Section 16: Attachment 16

CONFLICT OF INTEREST POLICY AND CODE OF ETHICS

CATALYST PUBLIC SCHOOLS CONFLICT OF INTEREST POLICY

ARTICLE 1. PURPOSE

The purpose of the conflict of interest policy is to protect the interests of Catalyst Public Schools when it is contemplating entering into a transaction or arrangement that might benefit the private interest of an officer or director of Catalyst Public Schools or might result in a possible excess benefit transaction. This policy is intended to supplement but not replace any applicable state and federal laws governing conflict of interest applicable to nonprofit and charitable organizations.

ARTICLE 2. DEFINITIONS

1. Interested Person

Any director, principal officer, or member of a committee with governing board-delegated powers, who has a direct or indirect financial interest, as defined below, is an interested person.

2. Financial Interest

A person has a financial interest if the person has, directly or indirectly, through business, investment, or family:

- a. An ownership or investment interest in any entity with which Catalyst Public Schools has a transaction or arrangement;
- b. A compensation arrangement with Catalyst Public Schools or with any entity or individual with which Catalyst Public Schools has a transaction or arrangement; or
- c. A potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which Catalyst Public Schools is negotiating a transaction or arrangement.

Compensation includes direct and indirect remuneration as well as gifts or favors that are not insubstantial. A financial interest is not necessarily a conflict of interest. Under Article 3, Section 4, a person who has a financial interest may have a conflict of interest only if the appropriate governing board or committee decides that a conflict of interest exists.

ARTICLE 3. PROCEDURES

3. Duty to Disclose

In connection with any actual or possible conflict of interest, an interested person must disclose the existence of the financial interest and be given the opportunity to disclose all material facts to the directors and members of committees with governing board-delegated powers considering the proposed transaction or arrangement.

4. Determining Whether a Conflict of Interest Exists

After disclosure of the financial interest and all material facts, and after any discussion with the

interested person, the interested person shall leave the governing board or committee meeting while the determination of a conflict of interest is discussed and voted upon. The remaining board or committee members shall decide if a conflict of interest exists.

5. Procedures for Addressing the Conflict of Interest

- a. An interested person may make a presentation at the governing board or committee meeting, but after the presentation, the interested person shall leave the meeting during the discussion of, and the vote on, the transaction or arrangement involving the possible conflict of interest.
- b. The chair of the governing board or committee shall, if appropriate, appoint a disinterested person or committee to investigate alternatives to the proposed transaction or arrangement.
- c. After exercising due diligence, the governing board or committee shall determine whether Catalyst Public Schools can obtain with reasonable efforts a more advantageous transaction or arrangement from a person or entity that would not give rise to a conflict of interest.
- d. The governing board or committee shall determine by a majority vote of the disinterested directors whether the transaction or arrangement is in Catalyst Public Schools' best interest, for its own benefit, and whether it is fair and reasonable. In conformity with the above determination, it shall make its decision as to whether to enter into the transaction or arrangement.

6. Violations of the Conflict of Interest Policy

- a. If the governing board or committee has reasonable cause to believe a member has failed to disclose actual or possible conflict of interest, it shall inform the member of the basis for such belief and afford the member an opportunity to explain the alleged failure to disclose.
- b. If, after hearing the member's response and after making further investigation as warranted by the circumstances, the governing board or committee determines the member has failed to disclose an actual or possible conflict of interest, it shall take appropriate disciplinary and corrective action.

ARTICLE 4. RECORDS OF PROCEEDINGS

The minutes of the governing board and all committees with board-delegated powers shall contain:

- The names of the persons who disclosed or otherwise were found to have a financial interest in connection with an actual or possible conflict of interest, the nature of the financial interest, any action taken to determine whether a conflict of interest was present, and the governing board's or committee's decision as to whether a conflict of interest in fact existed.
- The names of the persons who were present for discussions and votes relating to the transaction or arrangement, the content of the discussion, including any alternatives to the proposed transaction or arrangement, and a record of any votes taken in connection with the proceedings.

ARTICLE 5. COMPENSATION

- A voting member of the governing board who receives compensation, directly or indirectly, from Catalyst Public Schools for services is precluded from voting on matters pertaining to

that member's compensation.

- A voting member of any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from Catalyst Public Schools for services is precluded from voting on matters pertaining to that member's compensation.
- Any voting member of the governing board or any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from Catalyst Public Schools, either individually or collectively, is prohibited from providing information to any committee regarding compensation.

ARTICLE 6. PERIODIC STATEMENTS

Each director and officer shall periodically sign a statement that affirms such person:

- a. Has received the conflict of the interest policy,
- b. Has read and understands the policy,
- c. Has agreed to comply with the policy, and
- d. Understands that Catalyst Public Schools is a charitable organization and in order to maintain its federal tax exemption it must engage primarily in activities which accomplish one or more of its tax- exempt purposes.

CATALYST PUBLIC SCHOOLS CONFLICT OF INTEREST POLICY CERTIFICATION

The undersigned hereby acknowledges that the undersigned:

1. Has received a copy of the conflict of interest policy,
2. Has read and understands the conflict of interest policy,
3. Has agreed to comply with the conflict of interest policy, and
4. Understands that in order for Catalyst Public Schools to maintain its federal tax exemption as a charitable organization, it must engage primarily in activities that accomplish one or more of its tax-exempt purposes.

Please check one of the following boxes:

- ☐ I have no conflicts or potential conflicts to disclose.
- ☐ I have the following conflicts or potential conflicts to disclose (please describe):

Dated: _____

Print Name: _____

Title: _____

Signature: _____

CATALYST PUBLIC SCHOOLS CODE OF ETHICS POLICY

1. Personal and Professional Integrity

Catalyst Public Schools (the "School") is a workplace where all staff and board members of the School act with honesty, integrity, and openness in all their dealings as representatives of the School. The School promotes a working environment that values respect, fairness, and integrity.

2. Mission

The School has a clearly stated mission and purpose, that is approved by the board of directors, in pursuit of the public good. The School's mission is to foster the social and emotional development, safety, and well-being of children through education. All of its programs support that mission, and all of those who work for or on behalf of the School should understand and be loyal to that mission and purpose. The mission is responsive to the constituency and communities served by the School and is of value to the society at large.

3. Governance

The School has an active governing body that is responsible for setting the mission and strategic direction of the School and overseeing the finances, operation, and policies of the School.

The governing body:

1. Ensures that its board members have the requisite skills and experience to carry out their duties and that all board members understand and fulfill their governance duties and are acting for the benefit of the School and its public purpose;
2. Has a conflict of interest policy that ensures that any conflicts of interest or the appearance thereof are avoided or appropriately managed through disclosure, recusal, or other means;
3. Is responsible for the hiring, firing, and regular review of the performance of its top-level employee and ensures that the compensation of the top-level employee is reasonable and appropriate;
4. Ensures that its employees provide the governing body with timely and comprehensive information so that the governing body can effectively carry out its duties;
5. Ensures that the School conducts all transactions and dealings with integrity and honesty;
6. Ensures that the School promotes working relationships with board members, staff, and program beneficiaries that are based on mutual respect, fairness and openness;
7. Ensures that the School is fair and inclusive in its hiring and promotion policies and practices for all board and staff positions;
8. Ensures that policies of the School are in writing, clearly articulated, and officially adopted;

9. Ensures that the resources of the School are responsibly and prudently managed; and
10. Ensures that the School has the capacity to carry out its programs effectively.

4. Legal Compliance

The School strives to be knowledgeable of and comply with applicable laws and regulations.

5. Responsible Stewardship

The School manages its funds responsibly and prudently. This should include the following considerations:

1. The School should spend a reasonable percentage of its annual budget on programs that enable it to pursue its mission;
2. The School should spend an adequate amount on administrative expenses to ensure effective accounting systems, internal controls, competent staff, and other expenditures critical to professional management;
3. The School should compensate staff, and any others who may receive compensation, reasonably and appropriately;
4. The School should ensure that all spending practices and policies are fair, reasonable, and appropriate to fulfill the mission of the School; and
5. All financial reports should be factually accurate and complete in all material respects.



Catalyst: Bremerton

Section 19: Attachment 17

Contents:

- Memorandum of Understanding (MOU) or other partnership documentation: N/A. Catalyst has a collaborative relationship with local school districts but has not yet signed a formal partnership agreement.
- Letter of District-Charter Partnership Support, Center for Reinventing Public Education

February 18, 2019

Ms. Cindi Williams, Chairperson
Washington State Charter School Commission
P.O. Box 40996
Olympia, WA 98504-0996

Dear Chair Williams and Members of the Commission:

The Center on Reinventing Public Education (CRPE) is a bipartisan research and policy center affiliated with the University of Washington Bothell. For twenty-five years, the center has conducted research and policy analysis of charter schools and the portfolio school model. A special area of expertise is [charter-district collaboration](#). Across fifteen published reports, we have explored collaboration as it relates to instructional practice, district declining enrollment, parent navigation of choice, facilities access, and accountability, among others.

As part of a two-year grant with the Gates Foundation to support district-charter collaboration in Washington State, CRPE has been advising charter leaders on strategy and district communication. CRPE researchers have been in contact with the co-founders of Catalyst Public Schools, Amanda Gardner and Tatiana Epanchin. The nature of our support is detailed below:

- We have spoken with co-founders on four separate occasions to discuss their model, progress with board, and outreach to district. Gardner and Epanchin have used this guidance to conduct outreach to district leadership and board members.
- We have provided the team with a landscape analysis of the Bremerton district, which the team used to understand how their model aligns with district strategy and to identify areas for potential collaboration.

We are also aware of Gardner and Epanchin's significant outreach to local leaders, which include:

- Five meetings with the Bremerton School Board President to introduce the school and discuss district priorities. There is a plan to present to the full board.
- Three meetings with the Bremerton School District Superintendent and a standing, quarterly meeting with senior district staff to keep the district up-to-date on school planning and data trends. The meeting also provides a structure to address collaboration priorities, which include sharing professional development and best practices related to social-emotional learning.

- Contact with the South Kitsap School District to set up a meeting with district leaders.
- Proposed collaboration with the Olympic Educational Service District for back-office supports, special education services, and professional development staff.

Gardner and Epanchin have demonstrated a commitment to creating partnerships with the Bremerton and Central Kitsap School Districts, and we plan to support them as they continue to pursue collaboration efforts.

Should you have any questions or need additional information, please feel free to reach me at ghey@uw.edu.



Georgia Heyward
Research Analyst



Catalyst: Bremerton

Section 20: Attachment 18

Contents:

- Education Service Provider (ESP) Term Sheet: N/A. Catalyst is not contracting with an ESP Provider.



Catalyst: Bremerton

Section 21: Attachment 19

Contents:

- Staffing Chart

Section 21: Attachment 19



Updated: November 29, 2016

STAFFING CHART

Directions: Use the appropriate table below to outline your staffing plan for the school. Adjust or add functions and titles and add or delete rows as needed.

Elementary/Middle School Staffing Model and Rollout

	Year 1	Year 2	Year 3	Year 4	Year 5	Capacity
Principal(s)	2.0	2.0	1.0	1.0	1.0	1.0
Assistant Principal/Dean	0.0	0.0	1.0	1.0	1.0	1.0
Director of Finance and Operations	1.0	1.0	0.0	0.0	0.0	0.0
Classroom Teachers (Core Subjects): Lead Teachers	8.0	12.0	16.0	18.0	18.0	18.0
Student Support: Small Group Instructors--Certified	3.0	5.0	6.0	7.0	7.0	7.0
Student Support: Small Group Instructors--Classified	3.0	5.0	6.0	8.0	8.0	8.0
Student Support: Special Education Teachers	1.0	1.5	2.0	3.0	3.0	3.0
Teachers in Training	2.0	4.0	4.0	4.0	4.0	4.0
Teacher Aides and Assistants Special Education/ELL Aides	1.0	1.0	1.0	1.0	1.0	1.0
School Operations Support Staff: Family Community Engagement Coordinator	1.0	1.0	0.0	0.0	0.0	0.0
School Operations Staff: Operations and Business Manager	0.0	0.0	1.0	1.0	1.0	1.0
School Operations Staff: Office Manager	1.0	1.0	1.0	1.0	1.0	1.0
Total FTEs	23.0	33.5	39.0	45.0	45.0	45.0

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Catalyst: Bremerton

Section 21: Attachment 20

Contents:

- School Leader Evaluation Tool

Uncommon Schools Principal Evaluation Rubric

The Uncommon principal evaluation rubric is built around the seven levers of Leverage Leadership: each lever is measure by a rubric (attached). By focusing on these seven levers, leaders are able to leverage considerably more student learning from every unit of time they invest in their work.

1. **DATA-DRIVEN INSTRUCTION/WEEKLY DATA MEETING** – Define the roadmap for rigor and adapt teaching to meet the students’ needs
2. **OBSERVATION AND FEEDBACK**– Coach teachers to improve the learning
3. **PROFESSIONAL DEVELOPMENT** – Strengthen culture and instruction with hands-on training that sticks
4. **PLANNING/INSTRUCTIONAL CULTURE**– Prevent problems and guarantee strong lessons
5. **STUDENT CULTURE** – Create a strong culture where learning can thrive
6. **STAFF CULTURE** – Build and support the right team
7. **MANAGING SCHOOL LEADERSHIP TEAMS** – Train instructional leaders to expand your impact across the school
8. **PRINCIPAL LEADERSHIP**

The rubrics use a four-level rating scale with the following labels:

- 4- Advanced Proficient
- 3-Proficient
- 2-Working Towards
- 1-Needs Improvement

To score, read across the four levels of performance for each standard, find the level that best describes the principal’s performance and circle or highlight it. After evaluating for the entire rubric, summarize the best level that describes the principal’s proficiency.

LEVER 1: DATA DRIVEN INSTRUCTION/WEEKLY DATA MEETING

SUBJECT	ADVANCED PROFICIENT	PROFICIENT	WORKING TOWARDS	NEEDS IMPROVEMENT
Results	<p>1. PSAT and IA data predict that school will meet the network performance bar for all 4 SAT and AP metrics (11th and 12th grade SAT bar and 11th and 12th grade AP index bar)</p> <p>2. 100% of classes score within 5 percentage points of the network average for same subject classes</p>	<p>3. PSAT and IA data predict that school will meet the network performance bar for 3 of the 4 SAT and AP metrics (11th and 12th grade SAT bar and 11th and 12th grade AP index bar)</p> <p>4. 90% of classes score within 5 percentage points of the network average for same subject classes</p>	<p>5. PSAT and IA data predict that school will meet the network performance bar for 2 of the 4 SAT and AP metrics (11th and 12th grade SAT bar and 11th and 12th grade AP index bar)</p> <p>6. A number classes score below 5 percentage points of the network average for same subject classes</p>	<p>7. PSAT and IA data predict that school will meet the network performance bar for 0 or 1 of the 4 SAT and AP metrics (11th and 12th grade SAT bar and 11th and 12th grade AP index bar)</p> <p>8. The school is regularly at the bottom of performance on the network interim assessments</p>
Data-Driven Culture	<p>Principal has followed up the all-campus DDI PD for instructional leaders with additional targeted PD that meets the needs of his/her instructional leaders</p> <p>All teachers participate in interim assessment analysis meetings with an instructional leader</p> <p>Detailed school year calendar includes time for assessment creation/adaptation, implementation, analysis, action plans, and re-teaching</p> <p>DDI PD for teachers ensures that they are effectively versed in data-driven instruction—how interim assessments define rigor and how to adjust teaching to meet student needs</p>	<p>5. All instructional leaders have participated in all-campus DDI PD on leading analysis meetings and supervising teachers for implementing action plans</p> <p>80% teachers participate in interim assessment analysis meetings with an instructional leader</p> <p>7. School year calendar includes time for assessment creation/adaptation, implementation, analysis, action plans, and re-teaching</p> <p>8. DDI PD ensures that teachers are introduced to data-driven instruction—how interim assessments define rigor and how to adjust teaching to meet student needs</p>	<p>Most instructional leaders have participated in all-campus DDI PD on leading analysis meetings and supervising teachers for implementing action plans</p> <p>60% teachers participate in interim assessment analysis meetings with an instructional leader</p> <p>School year calendar includes some but not all of the items needed for proficient analysis and action</p> <p>PD addresses the topic of data-driven instruction, but teachers leave without the opportunity to fully understand and apply the tenets of assessment, analysis and action.</p>	<p>13. Some/few instructional leaders have participated in all-campus DDI PD on leading analysis meetings and supervising teachers for implementing action plans</p> <p>Less than 60% teachers participate in interim assessment analysis meetings with an instructional leader</p> <p>15. School year calendar includes few or none of the items needed for proficient implementation</p> <p>16. PD on data-driven instruction is not introduced to the staff</p>
See It	<p>See Past Success:</p> <p>1. The leader always connects authentic, data-based praise to academic goals already met and provides an authentic moment for reflection.</p> <p>See the Exemplar:</p> <p>The leader always leads the group/teacher to interpret the standard(s) and unpack the teacher and student exemplars</p> <p>See the Gap:</p> <p>The leader always guides participants to see the conceptual and procedural gap(s)</p>	<p>See Past Success:</p> <p>4. The leader consistently connects authentic, data-based praise to academic goals already met and provides an authentic moment for reflection.</p> <p>See the Exemplar:</p> <p>The leader consistently leads the group/teacher to interpret the standard(s) and unpack the teacher and student exemplars</p> <p>See the Gap:</p> <p>The leader consistently guides participants to see the conceptual and procedural gap(s)</p>	<p>See Past Success:</p> <p>7. The leader inconsistently connects authentic, data-based praise to academic goals already met and provides an authentic moment for reflection.</p> <p>See the Exemplar:</p> <p>The leader inconsistently leads the group/teacher to interpret the standard(s) and unpack the teacher and student exemplars</p> <p>See the Gap:</p> <p>The leader inconsistently guides participants to see the conceptual and procedural gap(s)</p>	<p>See Past Success:</p> <p>10. The leader does not connect authentic, data-based praise to academic goals already met nor provides an authentic moment for reflection.</p> <p>See the Exemplar:</p> <p>The leader does not lead the group/teacher to interpret the standard(s) or unpack the teacher and student exemplars</p> <p>See the Gap:</p> <p>The leader does not guide participants to see the conceptual and procedural gap(s)</p>
Name It	<p>Name the Error and Conceptual Understanding:</p> <p>The leader always prompts participants to clearly and concisely name the precise student error and conceptual misunderstanding before planning the re-teach.</p>	<p>Name the Error and Conceptual Understanding:</p> <p>The leader consistently prompts participants to clearly and concisely name the precise student error and conceptual misunderstanding before planning the re-teach.</p>	<p>Name the Error and Conceptual Understanding:</p> <p>The leader inconsistently prompts participants to clearly and concisely name the precise student error and conceptual misunderstanding before planning the re-teach.</p>	<p>Name the Error and Conceptual Understanding:</p> <p>The leader does not prompt participants to clearly and concisely name the precise student error and conceptual misunderstanding before planning the re-teach.</p>

LEVER 1: DATA DRIVEN INSTRUCTION/WEEKLY DATA MEETING

SUBJECT	ADVANCED PROFICIENT	PROFICIENT	WORKING TOWARDS	NEEDS IMPROVEMENT
Do It	<p>Plan the Reteach:</p> <p>17. The leader always leads the group/teacher in scripting an exemplar for the next applicable problem/question/prompt.</p> <p>18. The leader always leads the group/teacher to identify a reteach structure that will addresses the error identified in the See It. Teacher actions embedded in the plan lead to a conceptual understanding</p> <p>Practice:</p> <p>19. The leader always uses efficient prompts and feedback to keep participants on track and focused on addressing the conceptual error</p> <p>20. Practice always leverages existing resources and leads to a strong fine tuning of the plan for reteach</p> <p>Follow-up:</p> <p>21. The leader always locks in a highly effective follow-up plan</p>	<p>Plan the Reteach:</p> <p>22. The leader consistently leads the group/teacher in scripting an exemplar for the next applicable problem/question/prompt.</p> <p>23. The leader consistently leads the group/teacher to identify a reteach structure that will addresses the error identified in the See It. Teacher actions embedded in the plan lead to a conceptual understanding</p> <p>Practice:</p> <p>24. The leader consistently uses efficient prompts and feedback to keep participants on track and focused on addressing the conceptual error</p> <p>25. Practice consistently leverages existing resources and leads to a strong fine tuning of the plan for reteach</p> <p>Follow-up:</p> <p>26. The leader consistently locks in a highly effective follow-up plan</p>	<p>Plan the Reteach:</p> <p>27. The leader inconsistently leads the group/teacher in scripting an exemplar for the next applicable problem/question/prompt.</p> <p>28. The leader inconsistently leads the group/teacher to identify a reteach structure that will addresses the error identified in the See It. Teacher actions embedded in the plan lead to a conceptual understanding</p> <p>29.</p> <p>Practice:</p> <p>30. The leader inconsistently uses efficient prompts and feedback to keep participants on track and focused on addressing the conceptual error</p> <p>31. Practice inconsistently leverages existing resources and leads to a strong fine tuning of the plan for reteach</p> <p>Follow-up:</p> <p>32. The leader inconsistently locks in a highly effective follow-up plan</p>	<p>Plan the Reteach:</p> <p>33. The leader does not lead the group/teacher in scripting an exemplar for the next applicable problem/question/prompt.</p> <p>34. The leader does not lead the group/teacher to identify a reteach structure that will addresses the error identified in the See It. Teacher actions embedded in the plan do not lead to a conceptual understanding</p> <p>Practice:</p> <p>35. The leader does not use efficient prompts or feedback to keep participants on track and focused on addressing the conceptual error</p> <p>36. Practice does not leverage existing resources and leads to a strong fine tuning of the plan for reteach</p> <p>Follow-up:</p> <p>37. The leader does not lock in a highly effective follow-up plan</p>

LEVER 2: OBSERVATION AND FEEDBACK

Subject	ADVANCED PROFICIENT	PROFICIENT	WORKING TOWARDS	NEEDS IMPROVEMENT
See It	<p>See Past Success: 38. The leader always connects authentic, data-based praise to academic goals already met and provides an authentic moment for reflection.</p> <p>See the Exemplar: 1. Leader always prompts the teacher to name the exemplar, or shows the model if needed</p> <p>See the Gap: The leader always prompts the teacher to identify the gaps between the model/exemplar and their own practice</p>	<p>See Past Success: 3. The leader consistently connects authentic, data-based praise to academic goals already met and provides an authentic moment for reflection.</p> <p>See the Exemplar: 4. Leader consistently prompts the teacher to name the exemplar, or shows the model if needed</p> <p>See the Gap: The leader consistently prompts the teacher to identify the gaps between the model/exemplar and their own practice</p>	<p>See Past Success: 6. The leader inconsistently connects authentic, data-based praise to academic goals already met and provides an authentic moment for reflection.</p> <p>See the Exemplar: 7. Leader inconsistently prompts the teacher to name the exemplar, or shows the model if needed</p> <p>See the Gap: The leader inconsistently prompts the teacher to identify the gaps between the model/exemplar and their own practice</p>	<p>See Past Success: 9. The leader does not connect authentic, data-based praise to academic goals already met nor provides an authentic moment for reflection.</p> <p>See the Exemplar: 10. Leader does not prompt the teacher to name the exemplar, nor shows the model if needed</p> <p>See the Gap: The leader does not prompt the teacher to identify the gaps between the model/exemplar and their own practice</p>
Name It	<p>Name the Action Step: 12. Correctly identifies the highest lever issue in the class 90% of the time 13. 90% of actions steps are measureable, observable and bite-sized</p> <p>Punch it: 14. Leader always checks for teacher understanding of the action step</p>	<p>Name the Action Step: 15. Correctly identifies the best action step in a class 70% of the time 16. 70% of actions steps are measureable, observable and bite-sized</p> <p>Punch it: 17. Leader consistently checks for teacher understanding of the action step</p>	<p>Name the Action Step: 18. Correctly identifies the best action step in a class 50% of the time 19. 50% of actions steps are measureable, observable and bite-sized</p> <p>Punch it: 20. Leader inconsistently checks for teacher understanding of the action step</p>	<p>Name the Action Step: 21. Correctly identifies the highest lever in a class less than 50% of the time 22. Less than 50% of actions steps are measureable, observable and bite-sized</p> <p>Punch it: 23. Leader does not check for teacher understanding of the action step</p>

LEVER 2: OBSERVATION AND FEEDBACK

Subject	ADVANCED PROFICIENT	PROFICIENT	WORKING TOWARDS	NEEDS IMPROVEMENT
Do It	<p>Plan before Practice:</p> <p>24. Leader always has teacher script changes into an upcoming lesson plan</p> <p>25. Leader always perfects the plan by pushing for precision, modeling, or adding</p> <p>Practice: Leader always uses the following strategies to ensure highly effective practice:</p> <p>26. Ensures that teacher practices what is most important for the action step</p> <p>27. Always picks appropriate moment to stop the practice and give quick feedback, and has teacher re-do the practice until effective</p> <p>28. Picks right moments to model live if teaching is struggling with practice</p> <p>29. Uses “Stretch It”—adds layers of complexity to role play as teacher masters the action step</p> <p>Follow-up:</p> <p>30. All deliverables always have clear dates and are written into the leader’s and teacher’s meeting binders or calendar</p> <p>31. Leader always has clear plan to hold teacher accountable to implementation</p>	<p>Plan before Practice:</p> <p>32. Leader consistently has teacher script changes into an upcoming lesson plan</p> <p>33. Leader consistently perfects the plan by pushing for precision, modeling, or adding</p> <p>Practice: Leader consistently uses the following strategies to ensure highly effective practice:</p> <p>34. Ensures that teacher practices what is most important for the action step</p> <p>35. Always picks appropriate moment to stop the practice and give quick feedback, and has teacher re-do the practice until effective</p> <p>36. Picks right moments to model live if teaching is struggling with practice</p> <p>37. Uses “Stretch It”—adds layers of complexity to role play as teacher masters the action step</p> <p>Follow-up:</p> <p>38. All deliverables consistently have clear dates and are written into the leader’s and teacher’s meeting binders or calendar</p> <p>39. Leader consistently has clear plan to hold teacher accountable to implementation</p>	<p>Plan before Practice:</p> <p>40. Leader inconsistently has teacher script changes into an upcoming lesson plan</p> <p>41. Leader inconsistently perfects the plan by pushing for precision, modeling, or adding</p> <p>Practice: Leader inconsistently uses the following strategies to ensure highly effective practice:</p> <p>42. Ensures that teacher practices what is most important for the action step</p> <p>43. Always picks appropriate moment to stop the practice and give quick feedback, and has teacher re-do the practice until effective</p> <p>44. Picks right moments to model live if teaching is struggling with practice</p> <p>45. Uses “Stretch It”—adds layers of complexity to role play as teacher masters the action step</p> <p>Follow-up:</p> <p>46. All deliverables inconsistently have clear dates and are written into the leader’s and teacher’s meeting binders or calendar</p> <p>47. Leader inconsistently has clear plan to hold teacher accountable to implementation</p>	<p>Plan before Practice:</p> <p>48. Leader does not have teacher script changes into an upcoming lesson plan</p> <p>49. Leader does not perfect the plan by pushing for precision, modeling, or adding</p> <p>Practice: Leader does not use the following strategies to ensure highly effective practice:</p> <p>50. Ensures that teacher practices what is most important for the action step</p> <p>51. Always picks appropriate moment to stop the practice and give quick feedback, and has teacher re-do the practice until effective</p> <p>52. Picks right moments to model live if teaching is struggling with practice</p> <p>53. Uses “Stretch It”—adds layers of complexity to role play as teacher masters the action step</p> <p>Follow-up:</p> <p>54. Deliverables do not have clear dates and are written into the leader’s and teacher’s meeting binders or calendar</p> <p>55. Leader does not have clear plan to hold teacher accountable to implementation</p>
Frequency of Observations	<p>56. Ensures that all teachers are observed by an IL 3-4 times per month</p> <p>57. Maintains own observations in Whetstone consistently on a weekly basis throughout the entire year</p>	<p>58. Ensures that teachers are observed by IL 2 times per month</p> <p>59. Maintains 80% of observations in Whetstone updated on a bi-weekly basis</p>	<p>60. Teachers are observed once per month</p> <p>61. Maintains 60% of observations in Whetstone</p>	<p>62. Does not maintain regular observations of teachers</p> <p>63. Maintains 50% of observations in Whetstone</p>

LEVER 2: OBSERVATION AND FEEDBACK

Subject	ADVANCED PROFICIENT		PROFICIENT		WORKING TOWARDS		NEEDS IMPROVEMENT	
Effectiveness of Feedback	64.	90% of teachers effectively implement weekly action steps	68.	75% of teachers effectively implement weekly action steps	72.	50% of teachers effectively implement weekly action steps	76.	Less than 50% of teachers effectively implement weekly action steps
	65.	Teachers meet at least 2 of 3 personal PD goals	69.	Teachers meet 1 of 3 personal PD goals	73.	Teachers do not consistently meet PD goals	77.	Teachers do not meet personal PD goals
	66.	95% of directly managed staff agree (score of 4 or 5) on mid-year survey question “provides helpful instructional feedback.”	70.	85% of directly managed staff agree (score of 4 or 5) on mid-year survey question “provides helpful instructional feedback.”	74.	75% of directly managed staff agree (score of 4 or 5) on mid-year survey question “provides helpful instructional feedback.”	78.	65% of directly managed staff agree (score of 4 or 5) on mid-year survey question “provides helpful instructional feedback.”
	67.	Leader always adapts frequency of observations/meetings based on teacher needs	71.	Leader consistently adapts frequency of observations/meetings based on teacher needs	75.	Leader inconsistently adapts frequency of observations/meetings based on teacher needs	79.	Leader does not adapt frequency of observations/meetings based on teacher needs
In-the-Moment Feedback/ Real-time Coaching	1.	Leader always chooses appropriate moments for a classroom intervention	6.	Leader consistently chooses appropriate moments for a classroom intervention	11.	Leader inconsistently chooses appropriate moments for a classroom intervention	16.	Leader does not choose appropriate moments for a classroom intervention
	2.	90% of interventions are modeled in way that supports the flow of the class	7.	70% of interventions are modeled in a strategic moment that supports the flow of the class	12.	50% of interventions are modeled in a strategic moment that supports the flow of the class	17.	Less than 50% of interventions are modeled in a strategic moment that supports the flow of the class
	3.	Leader always effectively uses nonverbal signals to cue them to the error	8.	Leader consistently use nonverbal signals to cue them to the error	13.	Leader inconsistently use nonverbal signals to cue them to the error	18.	Leader does not use nonverbal signals to cue them to the error
	4.	Leader always gives teacher clear “What to Do”	9.	Leader consistently gives teacher clear “What to Do”	14.	Leader inconsistently gives teacher clear “What to Do”	19.	Leader does not give teacher clear “What to Do”
	5.	Leader always follows up with teacher to ensure implementation	10.	Leader consistently follows up with teacher to ensure implementation	15.	Leader inconsistently follows up with teacher to ensure implementation	20.	Leader does not follow up with teacher to ensure implementation

LEVER 3: PROFESSIONAL DEVELOPMENT

Subject	ADVANCED		PROFICIENT		WORKING TOWARDS		NEEDS IMPROVEMENT	
PLANNING See it/Name It/Do It Framework	21.	Objective/outcome of the workshop is directly tied to the practice component	28.	Objective/outcome of the workshop is directly tied to the practice component	35.	Objective/outcome of the workshop is not always apparent from the practice component	42.	Objective/outcome is unclear
	22.	Objective is directly aligned with the most important needs of the school at the time of the workshop	29.	Objective is aligned with important needs of the school at the time of the workshop	36.	Objective is partially aligned with important needs of the school at the time of the workshop	43.	Objective not aligned with school's needs
	23.	Agenda includes airtight activities that are tightly planned and 100% relevant to the core objective	30.	Agenda includes airtight activities that are well planned and relevant to the core objective	37.	Agenda has some activities, but they lack tight planning	44.	Discussion questions are not scripted
	24.	High quality discussion questions are scripted	31.	Quality discussion questions are scripted	38.	Discussion questions are not of consistent quality	45.	Agenda lacks detailed organization and there is little variety in activities/presentation
	25.	Highly effective balance of time for see it/name it/ do it	32.	There is an effective balance of time for see it/name it/ do it	39.	There is an imbalance in the time for see it/name it/ do it	46.	Reflection time is nonexistent
	26.	Reflection time is well used to capture big takeaways and help participants write their action steps	33.	Reflection time is used to capture big takeaways and/or help participants capture their action steps	40.	Reflection time is utilized, but workshop could use a little more or a little less of it	47.	Framing component of the session either does not sum up the right takeaways for teachers or causes confusion around the key takeaways
	27.	Framing component of the session concisely and articulately sums up the key takeaways for teachers	34.	Framing component of the session sums up the key takeaways for teachers	41.	Framing component of the session doesn't fully sum up the key takeaways for teachers		
Planning: Do It	48.	Practice is clearly aligned to what teachers most need to implement the PD objective	51.	Practice is aligned to what teachers most need to implement the PD objective	54.	Practice covers only part of what participants need to master in the session	57.	Practice is nonexistent and/or unaligned to the PD objective
	49.	There is sufficient time to plan, practice and re-do each action that the participant needs to master	52.	There is sufficient time to plan and practice each action that the participant needs to master	55.	There is insufficient time to plan and practice each action		
	50.	Participants are well-guided to give each other effective feedback (e.g., cheatsheet, one-pager, etc.)	53.	Participants receive feedback on their practice (from peers or PD leaders)	56.	There is insufficient or nonexistent feedback on their practice		
Facilitation	58.	Small/large group facilitation skillfully leads participants so that they reach the right conclusions mostly on their own; leader is highly skilled in asking the appropriate scaffolded questions when needed	60.	Small/large group facilitation leads participants to the right conclusions; leader uses appropriate scaffolded questions when needed and intervenes to pull the group on track if they are off task	62.	Small/large group facilitation often veers off track, and leader pulls them back on point but only after some lost time	64.	Small/large group activities are mostly off task, and leader struggles to bring them back to a productive place
	59.	Leader talk is 30% or less of the PD	61.	Leader talk is 40% or less of the PD	63.	Leader talks more often than s/he needs	65.	Leader talk predominates

LEVER 3: PROFESSIONAL DEVELOPMENT

Pacing and Time Management	<p>66. Leader not only follows the planned agenda but also makes good on-the-fly adjustments to the agenda based on the pulse of needs of the group</p> <p>67. PD maintains the perfect illusion of speed due to tightly managed transitions, sharing and clear instructions for each activity</p> <p>68. PD starts and ends on time and teachers arrive promptly</p>	<p>1. Leader follows the planned agenda and makes a good attempt at adjusting the agenda when necessary even if it doesn't work perfectly</p> <p>2. PD maintains a decent illusion of speed due to well managed transitions, sharing and fairly clear instructions for each activity</p> <p>3. PD ends within 5 min of planned end & teachers arrive fairly promptly</p>	<p>4. Leader follows the planned agenda but either struggles to stick to the times or doesn't know how to address unanticipated challenges</p> <p>5. PD components, sharing and/or transitions drag at times</p> <p>6. PD starts and/or ends more than 10 minutes late; some teachers arrive late without justification</p>	<p>7. Pacing and timing are way off: leader struggles to hold on to any of the original agenda items</p> <p>8. PD starts significantly late (where leader could have controlled the start time) or ends much later than expected</p>
FOLLOW-UP	<p>9. Leader has clearly planned how to hold staff accountable for outcomes</p> <p>10. Accountability mechanisms are transparent and tightly in place that should ensure 90% compliance</p>	<p>11. Leader has planned how to hold staff accountable for outcomes</p> <p>12. Accountability mechanisms are transparent and tightly in place that should ensure 80% compliance</p>	<p>13. Leader lacks clear indications as to how hold staff accountable for outcomes</p> <p>14. Accountability mechanisms are transparent and tightly in place that should ensure 70% compliance</p>	<p>15. Leader lacks any planning to hold staff accountable for outcomes</p> <p>16. Accountability mechanisms are transparent and tightly in place that should ensure 60% compliance</p>

LEVER 4: PLANNING/INSTRUCTIONAL CULTURE

SUBJECT	ADVANCED		PROFICIENT		WORKING TOWARDS		NEEDS IMPROVEMENT	
Lesson Fidelity	1. 2. 3.	Leader always ensures that all teachers have posted up-to-date lesson plans and exemplars aligned to pacing calendar and the school calendar. Leader always meets with teachers who are not proficient with lesson plan internalization and execution. Leader always observes with lesson plan and current action plan in hand.	4. 5. 6.	Leader ensures that 90% of teachers have posted up-to-date lesson plans and exemplars aligned to pacing calendar and the school calendar. Leader consistently meets with teachers who are not proficient with lesson plan internalization and execution. Leader consistently observes with lesson plan and current action plan in hand.	7. 8. 9.	Leader inconsistently ensures that teachers have posted up-to-date lesson plans and exemplars aligned to pacing calendar and the school calendar. Leader inconsistently meets with teachers who are not proficient with lesson plan internalization and execution. Leader inconsistently observes with lesson plan and current action plan in hand.	10. 11. 12.	Leader rarely ensures that teachers have posted up-to-date lesson plans and exemplars aligned to pacing calendar and the school calendar. Leader rarely meets with teachers who are not proficient with lesson plan internalization and execution. Leader rarely observes with lesson plan and current action plan in hand.
Lesson Prep	13. 14.	Leader always sets expectations and holds teachers accountable for having materials fully prepared and in hand during instruction. At least 90% of teachers show evidence of effective implementation of internalization protocols.	15. 16.	Leader consistently sets expectations and holds teachers accountable for having materials fully prepared and in hand during instruction. At least 70% of teachers show evidence of effective implementation of internalization protocols.	17. 18.	Leader inconsistently sets expectations and holds teachers accountable for having materials fully prepared and in hand during instruction. At least 50% of teachers show evidence of effective implementation of internalization protocols.	19. 20.	Leader rarely sets expectations and holds teachers accountable for having materials fully prepared and in hand during instruction. Less than 50% of teachers show evidence of effective implementation of internalization protocols.
Aggressive Monitoring Culture	Leader creates a school wide culture where at least 90% of classrooms are leveraging the following core monitoring practices: 21. Monitors student practice using an intentional pathway to reach key students, going to H – L – M. 22. Uses an effective system for collecting student data during IP. 23. Monitors in laps with a specific feedback focus that is announced to the class 24. Provides highly effective feedback through all of these techniques: narration, prompting, and coding papers.		Leader creates a school wide culture where at least 70% of classrooms are leveraging the following core monitoring practices: 25. Monitors student practice using an intentional pathway to reach key students, going to H – L – M. 26. Uses an effective system for collecting student data during IP. 27. Monitors in laps with a specific feedback focus that is announced to the class 28. Provides highly effective feedback through all of these techniques: narration, prompting, and coding papers.		Leader creates a school wide culture where at least 50% of classrooms are leveraging the following core monitoring practices: 29. Monitors student practice using an intentional pathway to reach key students, going to H – L – M. 30. Uses an effective system for collecting student data during IP. 31. Monitors in laps with a specific feedback focus that is announced to the class 32. Provides highly effective feedback through all of these techniques: narration, prompting, and coding papers.		Leader has a school wide culture where less than 50% of classrooms are leveraging the following core monitoring practices: 33. Monitors student practice using an intentional pathway to reach key students, going to H – L – M. 34. Uses an effective system for collecting student data during IP. 35. Monitors in laps with a specific feedback focus that is announced to the class 36. Provides highly effective feedback through all of these techniques: narration, prompting, and coding papers.	
Response to Data Culture	Leader creates a school wide culture where at least 90% of classrooms are leveraging the following core response-to-data practices: 37. Stops the Show if needed to fix error trends in the room. 38. Uses Show-Call to guide discourse 39. Charts key concepts or terms to reference and interact with during the discourse. 40. Stamps the key understanding with students		Leader creates a school wide culture where at least 70% of classrooms are leveraging the following core response-to-data practices: 41. Stops the Show if needed to fix error trends in the room. 42. Uses Show-Call to guide discourse 43. Charts key concepts or terms to reference and interact with during the discourse.		Leader creates a school wide culture where at least 50% of classrooms are leveraging the following core response-to-data practices: 45. Stops the Show if needed to fix error trends in the room. 46. Uses Show-Call to guide discourse 47. Charts key concepts or terms to reference and interact with during the discourse.		Leader has a school wide culture where less than 50% of classrooms are leveraging the following core response-to-data practices: 49. Stops the Show if needed to fix error trends in the room. 50. Uses Show-Call to guide discourse 51. Charts key concepts or terms to reference and interact with during the discourse. 52. Stamps the key understanding with students	

LEVER 4: PLANNING/INSTRUCTIONAL CULTURE

SUBJECT	ADVANCED	PROFICIENT	WORKING TOWARDS	NEEDS IMPROVEMENT
		44. Stamps the key understanding with students	48. Stamps the key understanding with students	
Student Writing	<p>Leader creates a school wide culture where students in at least 90% of classrooms are showing the following in their writing:</p> <p>53. Logically organized notes that make their thinking clear to them and the observer.</p> <p>54. Strong habits of literacy: pen in hand, purposefully annotating, planning before writing, using evidence.</p> <p>55. Working within 3 seconds of the directions and for the duration of time</p> <p>56. Usage of precise academic vocabulary to explain their thinking</p> <p>57. Demonstration of both content-recall and conceptual understanding.</p>	<p>Leader creates a school wide culture where students in at least 70% of classrooms are showing the following in their writing:</p> <p>58. Logically organized notes that make their thinking clear to them and the observer.</p> <p>59. Strong habits of literacy: pen in hand, purposefully annotating, planning before writing, using evidence.</p> <p>60. Working within 3 seconds of the directions and for the duration of time</p> <p>61. Usage of precise academic vocabulary to explain their thinking</p> <p>62. Demonstration of both content-recall and conceptual understanding.</p>	<p>Leader creates a school wide culture where students in at least 50% of classrooms are showing the following in their writing:</p> <p>63. Logically organized notes that make their thinking clear to them and the observer.</p> <p>64. Strong habits of literacy: pen in hand, purposefully annotating, planning before writing, using evidence.</p> <p>65. Working within 3 seconds of the directions and for the duration of time</p> <p>66. Usage of precise academic vocabulary to explain their thinking</p> <p>67. Demonstration of both content-recall and conceptual understanding.</p>	<p>Leader has a school wide culture where students in less than 50% of classrooms are showing the following in their writing:</p> <p>68. Logically organized notes that make their thinking clear to them and the observer.</p> <p>69. Strong habits of literacy: pen in hand, purposefully annotating, planning before writing, using evidence.</p> <p>70. Working within 3 seconds of the directions and for the duration of time</p> <p>71. Usage of precise academic vocabulary to explain their thinking</p> <p>72. Demonstration of both content-recall and conceptual understanding.</p>
Student Discussion	<p>Leader creates a school wide culture where students in at least 90% of classrooms are showing the following in their discourse:</p> <p>73. When turn and talk is used, all students engage in purposeful, on topic, and rigorous discussion.</p> <p>74. At least 90% of the talk ratio is student voice</p> <p>75. Class discussion represents student voice from high, medium, <i>and</i> low students.</p> <p>76. Strong habits of discussion by using evidence to justify their thinking and “learning to build” statements.</p> <p>77. Usage of precise academic vocabulary & complete sentences.</p>	<p>Leader creates a school wide culture where students in at least 70% of classrooms are showing the following in their discourse:</p> <p>78. When turn and talk is used, all students engage in purposeful, on topic, and rigorous discussion.</p> <p>79. At least 90% of the talk ratio is student voice</p> <p>80. Class discussion represents student voice from high, medium, <i>and</i> low students.</p> <p>81. Strong habits of discussion by using evidence to justify their thinking and “learning to build” statements.</p> <p>82. Usage of precise academic vocabulary & complete sentences.</p>	<p>Leader creates a school wide culture where students in at least 50% of classrooms are showing the following in their discourse:</p> <p>83. When turn and talk is used, all students engage in purposeful, on topic, and rigorous discussion.</p> <p>84. At least 90% of the talk ratio is student voice</p> <p>85. Class discussion represents student voice from high, medium, <i>and</i> low students.</p> <p>86. Strong habits of discussion by using evidence to justify their thinking and “learning to build” statements.</p> <p>87. Usage of precise academic vocabulary & complete sentences.</p>	<p>Leader has a school wide culture where students in less than 50% of classrooms are showing the following in their discourse:</p> <p>88. When turn and talk is used, all students engage in purposeful, on topic, and rigorous discussion.</p> <p>89. At least 90% of the talk ratio is student voice</p> <p>90. Class discussion represents student voice from high, medium, <i>and</i> low students.</p> <p>91. Strong habits of discussion by using evidence to justify their thinking and “learning to build” statements.</p> <p>92. Usage of precise academic vocabulary & complete sentences.</p>

LEVER 5: STUDENT CULTURE

Subject	ADVANCED		PROFICIENT		WORKING TOWARDS		NEEDS IMPROVEMENT	
Name the Gap	1.	Before the start of the school year, leader has a complete and detailed plan for “what to do” if there is a gap in student culture	4.	Before the start of the school year, leader has a complete plan for “what to do” if there is a gap in student culture	7.	Before the start of the school year, leader has a basic plan for “what to do” if there is a gap in student culture	10.	Before the start of the school year, leader does not have a plan for “what to do” if there is a gap in student culture
	2.	Leader always uses weekly school walkthroughs to assess student culture and identify gaps	5.	Leader consistently uses weekly school walkthroughs to assess student culture and identify gaps	8.	Leader inconsistently uses weekly school walkthroughs to assess student culture and identify gaps	11.	Leader rarely uses weekly school walkthroughs to assess student culture and identify gaps
	3.	Leader always determines the highest leverage routines and procedures that need to be tightened, relaunched, or introduced	6.	Leader consistently determines the highest leverage routines and procedures that need to be tightened, relaunched, or introduced	9.	Leader inconsistently determines the highest leverage routines and procedures that need to be tightened, relaunched, or introduced	12.	Leader does not determine the highest leverage routines and procedures that need to be tightened, relaunched, or introduced
Plan and Roll Out	13.	Leader always designs highly effective plans for the roll out by scripting a hook and scripting how they will show the execution of the procedure	15.	Leader consistently designs highly effective plans for the roll out by scripting a hook and scripting how they will show the execution of the procedure	17.	Leader inconsistently designs highly effective plans for the roll out by scripting a hook and scripting how they will show the execution of the procedure	19.	Leader does not design highly effective plans for the roll out by scripting a hook and scripting how they will show the execution of the procedure
	14.	Leader always designs highly effective plans for the modeling and staff practice of the routine/procedure	16.	Leader consistently designs highly effective plans for the modeling and staff practice of the routine/procedure	18.	Leader inconsistently designs highly effective plans for the modeling and staff practice of the routine/procedure	20.	Leader does not design highly effective plans for the modeling and staff practice of the routine/procedure
Monitor and Follow-Through	21.	Leader is always present and seen in key areas (lunch, troubled classrooms, hallways, etc.) after launch, communicating verbal and non-verbal	25.	Leader is consistently present and seen in key areas (lunch, troubled classrooms, hallways, etc.) after launch, communicating verbal and non-verbal	29.	Leader is inconsistently present and seen in key areas (lunch, troubled classrooms, hallways, etc.) after launch, communicating verbal and non-verbal	33.	Leader is not present and seen in key areas (lunch, troubled classrooms, hallways, etc.) after launch, communicating verbal and non-verbal
	22.	Leader always provides immediate feedback by modeling, addressing noncompliance, following-up with teachers, and using precise praise	26.	Leader consistently provides immediate feedback by modeling, addressing noncompliance, following-up with teachers, and using precise praise	30.	Leader inconsistently provides immediate feedback by modeling, addressing noncompliance, following-up with teachers, and using precise praise	34.	Leader does not provide immediate feedback by modeling, addressing noncompliance, following-up with teachers, or using precise praise
	23.	Leader always has difficult conversations with struggling teachers	27.	Leader consistently has difficult conversations with struggling teachers	31.	Leader inconsistently has difficult conversations with struggling teachers	35.	Leader does not have difficult conversations with struggling teachers
	24.	Leader always evaluates progress by doing walkthroughs, grading on a rubric, and discussing progress towards goals with the team/individuals	28.	Leader consistently evaluates progress by doing walkthroughs, grading on a rubric, and discussing progress towards goals with the team/individuals	32.	Leader inconsistently evaluates progress by doing walkthroughs, grading on a rubric, and discussing progress towards goals with the team/individuals	36.	Leader does not evaluate progress by doing walkthroughs, grading on a rubric, or discussing progress towards goals with the team/individuals
Morning Circle/Forum	37.	90% of teachers monitor and model high level of engagement	45.	70% of teachers monitor and model high level of engagement	54.	50% of teachers monitor and model high level of engagement	63.	Less than 50% of teachers monitor and model high level of engagement
	38.	Leader is always motivational and inspiring	46.	Leader is consistently motivational and positive	55.	Leader is inconsistently motivational and positive	64.	Leader is negative
	39.	The tone of circle/forum is consistently urgent, respectful, professional, and warm	47.	The tone of circle/forum is respectful, professional, and warm	56.	The tone of circle/forum is somewhat respectful, professional, and warm	65.	The tone of circle/forum is cold and disrespectful or unprofessional

LEVER 5: STUDENT CULTURE

	<p>40. All Circle/Forum topics address core values, college, or community needs.</p> <p>41. All students are silent and tracking the speaker.</p> <p>42. Leader encourages student participation through relevant questions and/or student presentation.</p> <p>43. All transitions within Circle/Forum are silent (ES and MS), smooth, and efficient.</p> <p>44. Leader always models behavioral and academic taxonomy techniques (e.g. cold call, CFU, positive framing)</p>	<p>48. Almost all Circle/Forum topics address core values, college, or community needs.</p> <p>49. 95% of students are silent and tracking the speaker.</p> <p>50. Leader encourages student participation through relevant questions and/or student presentation.</p> <p>51. Transitions within Circle/Forum are mostly silent (ES and MS), smooth, and efficient.</p> <p>52. Leader consistently models taxonomy techniques (cold call, CFU, positive framing)</p> <p>53. 100% of teachers/staff participate</p>	<p>57. Circle/Forum topics may not be connected to core values, college, or community needs.</p> <p>58. There are some side conversations and not all students are tracking the speaker.</p> <p>59. Leader does not encourage student participation with questions or student presentation.</p> <p>60. Transitions within Circle/Forum can be noisy or take too long.</p> <p>61. Leader occasionally models taxonomy techniques (cold call, CFU, positive framing)</p> <p>62. 80% of teachers/staff participate</p>	<p>66. Circle/Forum topics are not connected to core values, college, or community needs.</p> <p>67. Side conversations disrupt the flow of Circle/Forum.</p> <p>68. Transitions within Circle/Forum are almost always noisy and take too long.</p> <p>69. Leader does not model taxonomy techniques (cold call, CFU, positive framing)</p> <p>70. Less than 80% of teachers/staff participate</p>
Whole School Transitions (Breakfast, Lunch, Dismissal, Hallways)	<p>71. 100% of students make transition to destinations within the given amount of time.</p> <p>72. Teachers facilitate transition using economy of language.</p> <p>73. Students begin task immediately after the transition.</p> <p>74. All students are walking urgently, silently (ES, MS) and purposely.</p> <p>75. Breakfast/lunch systems guarantee that students leave eating area clean.</p>	<p>76. 90% of students make transition to destinations within the given amount of time.</p> <p>77. Teacher facilitate transition by narrating</p> <p>78. After the transition teachers narrate the next direction</p> <p>79. Most students are walking urgently, silently (ES, MS) and purposely to class.</p> <p>80. Breakfast/lunch systems guarantee that students leave most of eating area clean.</p>	<p>81. 80% of students make transitions to destination within the given amount of time.</p> <p>82. Teacher has to repeat directions.</p> <p>83. After the transition students are off task.</p> <p>84. Students are inconsistently walking to class.</p> <p>85. Some students clean up in eating area, but cafeteria is left somewhat messy.</p>	<p>86. Less than 80% of students make transitions to destinations within the given amount of time.</p> <p>87. Teacher has to repeat directions.</p> <p>88. After the transition students are off task.</p> <p>89. Students are running or roughhousing on the way to class.</p> <p>90. Cafeteria is left messy.</p>
In-Class Behavior	<p>1. The general tone of classroom is efficient, respectful and positive.</p> <p>2. 90-100% of teachers narrate positive student behaviors (rather than calling out the negative) and use praise, challenge and aspiration to motivate the students.</p> <p>3. Directions are specific, concrete, sequential, observable steps; steps are small enough that every student easily complies</p> <p>4. 90-100% of teachers use non-verbal authority, economy of language, and quiet power to gain compliance.</p> <p>5. Adults never engage student excuses/distractions during correction of student misbehavior</p>	<p>6. The general tone of the classroom is efficient, respectful and positive.</p> <p>7. 75-90% of teachers narrate positive student behaviors (rather than calling out the negative) and use praise, challenge and aspiration to motivate the students.</p> <p>8. Directions are specific, concrete, sequential, observable steps; sometimes more specific steps need to be offered if a few students do not comply on first attempt</p> <p>9. 75-90% of teachers use non-verbal authority, economy of language, and quiet power to gain compliance.</p>	<p>10. The general tone of the classroom is inconsistent in efficiency, respectfulness, and positivity.</p> <p>11. 60-75% of teachers do not use positive framing OR narrate negative student behaviors as often as positive, OR teacher does not use positive framing inconsistently using praise, challenge or aspiration to motivate students.</p> <p>12. Directions are sometimes not specific, concrete, sequential and/or observable.</p> <p>13. 60-75% of teachers use non-verbal authority, economy of language, and quiet power to gain compliance.</p>	<p>15. The general tone of classroom is inefficient and/or negative.</p> <p>16. Most teachers do not use positive framing and do not work to motivate students.</p> <p>17. Directions are vague and difficult to follow/understand.</p> <p>18. Fewer than 60% of teachers use non-verbal authority, economy of language, and quiet power to gain compliance.</p> <p>19. Adults often engage student excuses/distractions during correction of student misbehavior</p>

LEVER 5: STUDENT CULTURE

		Adults rarely engage student excuses/distractions during correction of student misbehavior	14. Adults sometimes engage student excuses/distractions during correction of student misbehavior	
Student Joy & Engagement	20. Students are visibly joyful and excited to be in school 21. 90-100% of students are engaged in classroom activities. 22. Older students internalize and model behavioral expectations without teacher supervision. 23. 100% of students exhibit STARS/SLANT or professional posture	24. Most students are visibly joyful and excited to be in school 25. 80-90% of students are engaged in classroom activities. 26. Older students internalize and model behavioral expectations with minimal teacher supervision. 27. 90% of students exhibit STARS/SLANT or professional posture	28. Some students are visibly joyful, there are notable instances of student arguments and/or lack of joy 29. 70-80% of students are engaged in classroom activities. 30. The older students have not internalized behavioral expectations and are resistant to those expectations. 31. 70% of students exhibit STARS/SLANT or professional posture	32. Most students are visibly not invested and seem disinterested in school 33. Less than 70% of students are engaged in classroom activities. 34. The older students have not internalized behavioral expectations and are more resistant to those expectations than younger students 35. Less than 70% of students exhibit STARS/SLANT or professional posture
Student Compliance	36. 100% of students follow school rules and classroom expectations 100% of the time without the need for reminders. 37. Students track the teacher 100% of the time and peers 75%+ of the time. 38. Students are 100% compliant with the uniform policy with no reminders. 39. Student discipline system is widely used by teachers and is effective at addressing small misbehaviors. 40. Student response to correction is immediate, positive, respectful, and does not require repetition.	41. 90% of students follow school rules and classroom expectations 95% of the time. Some reminders are necessary. 42. Students track the teacher 85% of the time and peers 50%+ of the time. 43. Students are 90% compliant with the uniform policy. Some reminders are necessary. 44. Student discipline system is used by most teachers and is effective at addressing small misbehaviors. 45. Student response to correction is quick, respectful, but requires some repetition.	46. 80% of students follow school rules and classroom expectations 90% of the time. Reminders are often necessary. 47. Students track the teacher 75% of the time and peers less than 50% of the time. 48. Students are 80% compliant with the uniform policy. Reminders are frequently necessary. 49. Student discipline system is only used sporadically. It is not effective at addressing small misbehaviors. 50. Student response to correction is not immediate and requires explanation or engagement. Repetition is necessary.	51. Fewer than 70% of students follow school rules and classroom expectations 90% of the time. Reminders are frequently necessary. 52. Students track the teacher less than 75% of the time and do not track peers. 53. Students are less than 70% compliant with the uniform policy. Reminders are frequently necessary and are ineffective. 54. Student discipline system is not used and/or is completely ineffective at addressing small misbehaviors. 55. Students do not correct their behavior or are disrespectful. Teacher action has little impact on student behavior.
Principal Strong Voice	56. Leader is always motivational and inspiring 57. Leader is able to achieve 100% compliance 100% of the time 58. Leader tone is consistently urgent, respectful, professional, and warm 59. Leader facilitates whole school moments using economy of language. 60. During principal facilitation of whole school moments, 100%	63. Leader is consistently motivational and inspiring 64. Leader is able to achieve 100% compliance 90% of the time 65. Leader tone is usually urgent, respectful, professional, and warm 66. Leader facilitates whole school moments using economy of language.	70. Leader is inconsistently motivational and inspiring 71. Leader is able to achieve 90% compliance 90% of the time 72. Leader tone is sometimes urgent, respectful, professional, and warm 73. Leader facilitates whole school moments using economy of language.	77. Leader is not motivational and inspiring 78. Leader is not able to achieve at least 90% compliance OR leader achieves compliance less than 90% of the time 79. Leader tone is infrequently urgent, respectful, professional, and warm 80. Leader facilitates whole school moments using economy of language.

LEVER 5: STUDENT CULTURE

	<p>students are silent and moving urgently</p> <p>61. Leader always models behavioral and academic taxonomy techniques (e.g. cold call, CFU, positive framing)</p> <p>62. Leader is able to deftly work a range of techniques, including TlaC and administering additional consequences, to reset students who display particularly challenging behaviors and is almost always successful in achieving student compliance</p>	<p>67. During principal facilitation of whole school moments, 90% students are silent and moving urgently</p> <p>68. Leader usually models behavioral and academic taxonomy techniques (e.g. cold call, CFU, positive framing)</p> <p>69. Leader is able to work a range of techniques, including TlaC and administering additional consequences, to reset students who display particularly challenging behaviors and is usually successful in achieving student compliance</p>	<p>74. During principal facilitation of whole school moments, 85% students are silent and moving urgently</p> <p>75. Leader sometimes models behavioral and academic taxonomy techniques (e.g. cold call, CFU, positive framing)</p> <p>76. Leader is able to work a range of techniques, including TlaC and administering additional consequences, to reset students who display particularly challenging behaviors and is sometimes successful in achieving student compliance</p>	<p>81. During principal facilitation of whole school moments, fewer than 85% students are silent and moving urgently</p> <p>82. Leader infrequently models behavioral and academic taxonomy techniques (e.g. cold call, CFU, positive framing)</p> <p>83. Leader is infrequently able to work a range of techniques, including TlaC and administering additional consequences, to reset students who display particularly challenging behaviors/these techniques are usually unsuccessful</p>
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SUBJECT	ADVANCED	PROFICIENT	WORKING TOWARDS	NEEDS IMPROVEMENT
Leader Presence	1. Leader is pervasively present throughout the school and only in office and in meetings as absolutely necessary 2. Leader always models the all hands on deck mentality.	3. Leader is present throughout the school and only in office and in meetings as absolutely necessary 4. Leader consistently models the all hands on deck mentality.	5. Leaders is occasionally throughout the school but gets regularly side-tracked 6. Leader sometimes models all hands on deck mentality.	Leader is fairly absent from the school, spending most of the time in the office Leader inconsistently models all hands on deck mentality.
Relationships with Teachers	9. Always approaches the teachers they lead with a positive tone 10. Always monitors and proactively addresses teacher stress levels 11. Always communicates professional demeanor & emotional constancy 12. 95% of teachers “agree” that “Leader cares about me as a person” on staff survey	13. Usually approaches the teachers they lead with a positive tone 14. Usually monitors, reacts to, and addresses teacher stress levels 15. Consistently communicates professional demeanor & emotional constancy 16. 90% of teachers “agree” that “Leader cares about me as a person” on staff survey	17. Sometimes approaches the teachers they lead with a positive tone 18. Occasionally monitors, reacts to, and addresses teacher stress levels 19. Inconsistently communicates professional demeanor & emotional constancy 20. 80% of teachers “agree” that “Leader cares about me as a person” on staff survey	21. Irregularly approaches the teachers they lead with a positive tone 22. Intermittently monitors, reacts to, and addresses teacher stress levels 23. Irregularly communicates professional demeanor & emotional constancy 24. Less than 70% of teachers “agree” that “Leader cares about me as a person” on staff survey
Staff Survey Results	95% staff answer positively to the following questions: 25. My Instructional Leader meets with me at least 2-3 times/month to give me feedback on my instruction, plan for the upcoming week, or do a general check-in. 26. Staff morale at the school is positive. 27. My Principal/Co-Director regularly recognizes and praises good teacher/staff work. 28. My principal is inspiring leader 29. I have a friend at work	90% staff answer positively to the following questions: 30. My Instructional Leader meets with me at least 2-3 times/month to give me feedback on my instruction, plan for the upcoming week, or do a general check-in. 31. Staff morale at the school is positive. 32. My Principal/Co-Director regularly recognizes and praises good teacher/staff work. 33. My principal is inspiring leader 34. I have a friend at work	80% staff answer positively to the following questions: 35. My Instructional Leader meets with me at least 2-3 times/month to give me feedback on my instruction, plan for the upcoming week, or do a general check-in. 36. Staff morale at the school is positive. 37. My Principal/Co-Director regularly recognizes and praises good teacher/staff work. 38. My principal is inspiring leader 39. I have a friend at work	Less than 70% staff answer positively to the following questions: 40. My Instructional Leader meets with me at least 2-3 times/month to give me feedback on my instruction, plan for the upcoming week, or do a general check-in. 41. Staff morale at the school is positive. 42. My Principal/Co-Director regularly recognizes and praises good teacher/staff work. 43. My principal is inspiring leader 44. I have a friend at work
Leader Communication	1. Weekly staff emails are always inspiring, informative, and mission driven. 2. Leader is always proactive about communicating important staff decisions. 3. Leader always chooses the appropriate form of communication (one on one, email, staff meeting) to share important school wide events, decisions, and issues.	4. Weekly staff emails are usually inspiring, informative, and mission driven. 5. Leader is usually proactive about communicating important staff decisions. 6. Leader consistently chooses the appropriate form of communication (one on one, email, staff meeting) to share important school wide events, decisions, and issues.	7. Weekly staff emails are sometimes inspiring, informative, and mission driven. 8. Leader is occasionally proactive about communicating important staff decisions. 9. Leader inconsistently chooses the appropriate form of communication (one on one, email, staff meeting) to share important school wide events, decisions, and issues.	10. Weekly staff emails are rarely inspiring, informative, and mission driven. 11. Leader is reactive about communicating important staff decisions. 12. Leader does not choose the appropriate form of communication (one on one, email, staff meeting) to share important school wide events, decisions, and issues.

Staff Rituals	1.	Leader has systematized school cultural events (sunshine breakfast, birthday buddies, J-factor) and empowered staff in implementation	5.	Leader has school cultural events (sunshine breakfast, birthday buddies, J-factor) and empowered staff in implementation	8.	Leader has minimum amount of school cultural events(sunshine breakfast, birthday buddies, J-factor)	11.	Leader lacks school cultural events(sunshine breakfast, birthday buddies, J-factor) and does not have an owner of the events
	2.	Leader always participates in staff rituals	6.	Leader usually participates in staff rituals	9.	Leader occasionally participates in staff rituals	12.	Leader rarely participates in staff rituals
	3.	Honors and communicates sustainability ½ days	7.	Leader usually celebrates student achievement and growth after each data round (IA's, STEP, etc.)	10.	Leader occasionally celebrates student achievement and growth after each data round (IA's, STEP, etc.)	13.	Leader irregularly celebrates student achievement and growth after each data round (IA's, STEP, etc.)
	4.	Leader always celebrates teachers' contributions to student achievement and growth after each data round (IA's, STEP, etc.)						

Subject	ADVANCED	PROFICIENT	WORKING TOWARDS	NEEDS IMPROVEMENT
Growing from Teacher to Leader	All instructional leaders embody all of the core beliefs of the school leaders:	Nearly all of the instructional leaders implements the core beliefs of school leaders:	Instructional leaders inconsistently implement the core beliefs of school leaders:	Instructional leaders do not embody the core beliefs:
	14. 100% committed to the students and the school	21. 100% committed to the students and the school	28. 100% committed to the students and the school	35. 100% committed to the students and the school
	15. Humble and reflective in openness to feedback and own areas of growth	22. Humble and reflective in openness to feedback and own areas of growth	29. Humble and reflective in openness to feedback and own areas of growth	36. Humble and reflective in openness to feedback and own areas of growth
	16. Always optimistic and caring and responsible for positivity of the community and all its members	23. Always optimistic and caring and responsible for positivity of the community and all its members	30. Always optimistic and caring and responsible for positivity of the community and all its members	37. Always optimistic and caring and responsible for positivity of the community and all its members
	17. Own teachers' results as his/her own	24. Own teachers' results as his/her own	31. Own teachers' results as his/her own	38. Own teachers' results as his/her own
	18. Openly communicates concerns to school leaders	25. Openly communicates concerns to school leaders	32. Openly communicates concerns to school leaders	39. Openly communicates concerns to school leaders
	19. Always models appropriate use of school systems	26. Always models appropriate use of school systems	33. Always models appropriate use of school systems	40. Always models appropriate use of school systems
	20. Always publicly supports all school initiatives	27. Always publicly supports all school initiatives	34. Always publicly supports all school initiatives	41. Always publicly supports all school initiatives

Subject	ADVANCED		PROFICIENT		WORKING TOWARDS		NEEDS IMPROVEMENT	
Effectiveness of Instructional Feedback	All instructional leaders meet the following goals:		Nearly all the instructional leaders meet the following goals:		Some of the instructional leaders meet the following goals:		Almost all of the instructional leaders do <u>not</u> meet the goals listed in the previous columns	
	42.	Their teachers meet 2 of 3 PD goals established at the beginning of each semester, making substantial progress over the course of the year	46.	Their teachers meet 1 or 2 PD goals established at the beginning of each semester, making notable progress over the course of the year	50.	Some teachers managed by ILs meet 1 of 3 PD goals established at the beginning of the year, and some notable areas of improvement remain in their teaching		
	43.	95% of teachers consistently implement their feedback (lesson plans, observations, data, etc.)	47.	90% of teachers consistently implement their feedback (lesson plans, observations, data, etc.)	51.	80% of teachers implement feedback from instructional leader (lesson plans, observations, data, etc.)		
	44.	Score 4.6 or higher out of 5 on mid-year survey question “provides helpful instructional feedback.”	48.	Score 4.6 or higher out of 5 on mid-year survey question “provides helpful instructional feedback.”	52.	Score 4.6 or higher out of 5 on mid-year survey question “provides helpful instructional feedback.”		
	45.	Adapt frequency of observations/ meetings based on teacher needs and principal feedback	49.	Adapt frequency of observations/ meetings based on teacher needs and principal feedback	53.	Adapt frequency of observations/ meetings based on teacher needs and principal feedback		
Time &Task Management	All instructional leaders meet the following goals:		Nearly all the instructional leaders meet the following goals:		Most of the instructional leaders meet the following goals:		Almost all of the instructional leaders do <u>not</u> meet the goals listed in the previous columns	
	54.	Meet all required deadlines	57.	Meet 90% of required deadlines	59.	Meet 75% of required deadlines		
	55.	Successfully manage responsibilities of teaching and instructional leadership, maintaining the highest quality in both areas	58.	Successfully manage responsibilities of teaching and instructional leadership, maintaining high quality in both areas	60.	Maintain proficient teacher with their instructional leadership responsibilities		
Coaching IL’s	1.	Principal meets with each IL 2-3 times per month	6.	Principal meets with each IL 1-2 times per month	11.	Principal meets with each IL less frequently than once per month	16.	Principal does not have regular IL check-ins
	2.	Principal audits Whetstone action steps bi-weekly and provides high quality feedback on action steps	7.	Principal audits Whetstone action steps monthly and provides high quality feedback on action steps	12.	Principal audits Whetstone action steps monthly but doesn’t always provide high quality feedback on action steps	17.	Principal does not audit Whetstone regularly for quality of action steps
	3.	Principal annually assesses ILs on IL rubric and DCI on DCI rubric	8.	Principal annually assesses ILs on IL rubric and DCI on DCI rubric	13.	Principal annually assesses 50% of ILs on the IL rubric	18.	Principal does not complete IL or DCI evaluations
	4.	Principal identifies potential future ILs and develops their leadership through well-designed stretch projects	9.	Principal identifies potential future ILs and develops their leadership through stretch projects	14.	Principal identifies potential future ILs but does not provide stretch projects	19.	Principal does not identify potential future ILs
	5.	Principal meets with IL team as a group once per month to develop IL team and provides high-quality follow-up to cross-regional IL PD	10.	Principal meets with IL team as a group quarterly to develop IL team and provides follow-up to cross-regional IL PD	15.	Principal meets with IL team as a group 2x per year to develop IL team and provides follow-up to cross-regional PD	20.	Principal meets with IL team as a group 4x per year to develop IL team
						21.	Principal does not conduct IL Team meetings	

Subject	ADVANCED		PROFICIENT		WORKING TOWARDS		NEEDS IMPROVEMENT	
DOS Management	1.	Always has a formal weekly check-in with the DOS, using a structured agenda that focuses on developing DOS around PD goals based in the DOS rubric	7.	Holds a formal check-in with the DOS three times per month, using a structured agenda that focuses on developing DOS around PD goals based in the DOS rubric	13.	Holds a formal check-in with the DOS twice a month, generally using a structured agenda that focuses on developing DOS around PD goals based in the DOS rubric	19.	Rarely holds formal check-in with the DOS twice a month to develop DOS around PD goals
	2.	Consistently ensures that DOS is accomplishing all daily aspects of role, including closing the loop with staff communication around student behavior and sharing Kickboard data, and gives immediate, actionable feedback when any task is not met	8.	Ensures that DOS is accomplishing all daily aspects of role, including closing the loop with staff communication around student behavior and sharing Kickboard data, and gives actionable feedback when any task is not met	14.	Sporadically ensures that DOS is accomplishing all daily aspects of role, including closing the loop with staff communication around student behavior and sharing Kickboard data, but does not consistently give feedback around unmet tasks	20.	Frequently fails to ensure DOS is accomplishing all daily aspects of role or give feedback around unmet tasks
	3.	Seamlessly works with DOS throughout the day, as needed, to manage crisis situations and make real-time decisions around tough behavioral situations	9.	Works effectively with DOS throughout the day, as needed, to manage crisis situations and make real-time decisions around tough behavioral situations	15.	Inefficiencies are frequent in working with DOS on managing crisis situations and making real-time decisions around tough behavioral situations during the school day	21.	Struggles to manage crisis situations and make real-time decisions around tough behavioral situations with DOS during the school day, resulting in crisis situations escalating and/or principal time being dominated by student behavior
	4.	Consistently observes the DOS Office at least three times per week to ensure that expectations for office structures are met	10.	Observes the DOS Office 1-2 times per week to ensure that expectations for office structures are met	16.	Irregularly observes the DOS Office to ensure that expectations for office structures are met	22.	Rarely observes the DOS Office, resulting in DOS Office expectations frequently going unmet
	5.	Consistently reviews OSS letters and observes meetings DOS has with families, as needed based on DOS proficiency, to ensure they're top quality	11.	Reviews OSS letters and observes meetings DOS has with families, as needed based on DOS proficiency, to ensure they're top quality	17.	Irregularly reviews OSS letters and observes meetings DOS has with families to ensure they're top quality	23.	Rarely reviews OSS letters and observes meetings DOS has with families, resulting in ineffective communication between DOS and families
	6.	Completes at least one school walkthrough each week with DOS to ensure shared vision for student culture and to create action plan to remedy negative culture trends	12.	Completes at least one school walkthrough every other week with DOS to ensure shared vision for student culture and to create action plan to remedy negative culture trends	18.	Irregularly completes school walkthroughs with DOS to ensure shared vision for student culture and to create action plan to remedy negative culture trends	24.	Rarely completes school walkthroughs with DOS
Communication with DOO	25.	Always ensures that a weekly 1-hour meeting or two weekly 30-minute meetings are held between principal and DOO	31.	Ensure that a 1-hour meeting or two 30-minute meetings are held between principal and DOO in 3 weeks of every month	37.	Holds a 1-hour meeting or two 30-minute meetings with DOO every other week	43.	Rarely meets with DOO
	26.	Always sends agenda to DOO 24 hours before meeting with topics to cover	32.	Generally sends agenda to DOO 24 hours before meeting with topics to cover	38.	Occasionally sends agenda to DOO 24 hours before meeting with topics to cover	44.	Rarely sends agenda to DOO before meeting with topics to cover
	27.	Always facilitates a "3-week Look Ahead" to name the Ops support needed for major school events	33.	Facilitates a "3-week Look Ahead" to name the Ops support needed for major school events	39.	Occasionally facilitates a "look ahead" to outline Ops support needed for major school events	45.	Rarely facilitates a "look ahead" to outline Ops support needed for major school events, resulting in miscommunication and poorly executed events
	28.	Always clearly messages a Co-Leader mindset to school staff, ensuring that staff see principal and DOO as equals	34.	Consistently messages a Co-Leader mindset to school staff, working to ensure that staff see principal and DOO as equals	40.	Inconsistently messages a Co-Leader mindset to school staff	46.	Rarely messages a Co-Leader mindset to school staff, resulting in staff who do not treat co-founders as equal
	29.	Proactively works to build a	35.	Proactively works to build a	41.	Inconsistently works to build a positive co-leader relationship	47.	Fails to proactively build a positive co-leader relationship
					42.	Sometimes brings concerns around DOO communication to		

Subject	ADVANCED	PROFICIENT	WORKING TOWARDS	NEEDS IMPROVEMENT
	<p>positive co-leader relationship, including establishing and following communication norms and supporting DOO's growth and success</p> <p>30. Always brings concerns around DOO communication to AMD in a timely fashion and engages enthusiastically in action planning around improving relationship</p>	<p>positive co-leader relationship, including establishing and following communication norms and supporting DOO's growth and success</p> <p>36. Generally brings concerns around DOO communication to AMD in a timely fashion and engages enthusiastically in action planning around improving relationship</p>	<p>AMD in a timely fashion and engages in action planning around improving relationship</p>	<p>48. and doesn't effectively respond to tension in relationship Rarely brings concerns around DOO communication to AMD and/or is resistant to action planning to improve relationship</p>

SUBJECT	ADVANCED PROFICIENT	PROFICIENT	WORKING TOWARDS	NEEDS IMPROVEMENT
Leadership Traits	<p>Results from Principal Peer Survey, staff survey, and manager observation find the leader:</p> <p>49. Is always willing to do whatever it takes to get the work done right.</p> <p>50. Always accepts responsibility and apologizes for problems and mistakes</p> <p>51. Carefully manages tasks and time, is well-organized, and is detail-oriented: proactively manages self and others on projects/ initiatives</p> <p>52. Always demonstrates strong, positive, professional interpersonal skills with manager, colleagues, families and students</p> <p>53. Functions well as a team player in the All-Campus Leadership Team; cares about others' successes as much as their own, including supporting every schools' growth and improvement</p> <p>54. Engages in effective "difficult conversations", proactively seeking them out when necessary.</p> <p>55. Provides clear, direct, and respectful feedback to fellow school leaders.</p> <p>56. Always manages effective decision making protocols</p>	<p>Results from Principal Peer Survey, staff survey, and manager observation find the leader:</p> <p>57. Is willing to do whatever it takes to get the work done right.</p> <p>58. Accepts responsibility and apologizes for problems and mistakes</p> <p>59. Manages tasks and time, is well-organized, and is detail-oriented: doesn't drop the ball on projects/initiatives</p> <p>60. Demonstrates strong, positive, professional interpersonal skills with manager, colleagues, families and students</p> <p>61. Functions well as a team player in the All-Campus Leadership Team; cares about others' successes as much as their own, including supporting every schools' growth and improvement</p> <p>62. Engages effectively in "difficult conversations" and occasionally seeks them out when necessary.</p> <p>63. Provides clear, direct, and respectful feedback to fellow school leaders when prompted</p>	<p>Results from Principal Peer Survey, staff survey, and manager observation find the leader:</p> <p>64. Is somewhat willing to do whatever it takes to get the work done right.</p> <p>65. Occasionally doesn't accept responsibility or apologize for problems and mistakes</p> <p>66. Somewhat manages tasks and time, is somewhat organized, occasionally drops the ball on projects/initiatives</p> <p>67. Somewhat demonstrates strong, positive, professional interpersonal skills with manager, colleagues, families and students</p> <p>68. Occasionally functions well as a team player in the All-Campus Leadership Team; somewhat cares about others' successes as much as their own, including occasionally supporting every schools' growth and improvement</p> <p>69. Occasionally engages in effective "difficult conversations" when prompted</p> <p>70. Feedback to school leaders is somewhat clear and respectful and/or sometimes is not provided in a timely fashion</p>	<p>Results from Principal Peer Survey, staff survey, and manager observation find the leader:</p> <p>71. Is not willing to do whatever it takes to get the work done right.</p> <p>72. Does not accept responsibility and apologizes for problems and mistakes</p> <p>73. Does not manages tasks and time, lacks organization: frequently drops the ball on projects/initiatives</p> <p>74. Lacks strong, positive, professional interpersonal skills with manager, colleagues, families and students</p> <p>75. Does not function well as a team player in the All-Campus Leadership Team; does not care about others' successes as much as their own, including supporting every schools' growth and improvement</p> <p>76. Avoids "difficult conversations" and does not provide clear and respectful feedback to fellow school leaders.</p>
Progress towards Personal Goals	<p>77. Has met or is on track to completing personal goals set with their manager</p> <p>78. Continuously reflects on the strengths and weaknesses of his/her own performance</p>	<p>79. Is on track to completing personal goal by formal evaluation</p> <p>80. Reflects on the strengths and weaknesses of his/her own performance</p>	<p>81. Is not on track to completing personal goal by formal evaluation</p> <p>82. Occasionally reflects on the strengths and weaknesses of his/her own performance</p>	<p>83. Is not on track to completing personal goal by formal evaluation or end of year</p> <p>84. Does not reflect on the strengths and weaknesses of his/her own performance</p>



Catalyst: Bremerton

Section 21: Attachment 21

Contents:

- Teacher Evaluation Tool

TEACHER EVALUATION

Teacher's Name: _____ Grade Level and Subject: _____ Date of Evaluation: _____

<i>INSTRUCTION</i>	Advanced	Proficient	Working Towards	Needs Improvement
Establishing Learning Expectations and Student Engagement	<p>1. Serves as a model in establishing, demands high expectations for student learning, behavior, and quality of work in a variety of ways, including: Right is Right, No Opt Out, and Cold Call.</p> <p>2. Has developed a classroom culture where 95-100% of the students are engaged in the learning activity, as demonstrated by their attentiveness and participation.</p> <p>3. 85%-90% of student hands are raised or students are ready to answer immediately when cold called when reviewing taught material. More than 50% of hands are raised during new material</p>	<p>4. Establishes, communicates, and demands high expectations for student learning, behavior, and quality of work in a variety of ways, including: Right is Right, No Opt Out, and Cold Call.</p> <p>5. Has developed a classroom culture where 90% of the students are engaged in the learning activity.</p> <p>6. 75-85% of hands are raised when reviewing taught material. Approximately 50% of hands are raised during new material.</p>	<p>7. Inconsistently establishes, communicates, and demands high expectations for student learning, behavior, and quality of work, and inconsistently uses Right is Right, No Opt Out, and Cold Call, or uses them at inappropriate times.</p> <p>8. Has developed a classroom culture where 80% of the students are engaged in the learning activity.</p> <p>9. 65%-75% of hands are raised when reviewing taught material. About 35%-45% of hands are raised during new material.</p>	<p>10. Does not succeed in establishing, communicating, and/or demanding high expectations for student learning, behavior, and quality of work and does not use Right is Right, No Opt Out, or Cold Call to establish expectations.</p> <p>11. Less than 80% of students are engaged in the learning activity.</p> <p>12. Less than 65% of hands are raised when reviewing taught material. Less than 35% of hands are raised during new material.</p>

TEACHER EVALUATION

Teacher's Name: _____ Grade Level and Subject: _____ Date of Evaluation: _____

<i>INSTRUCTION</i>	Advanced	Proficient	Working Towards	Needs Improvement
Use of Instructional Strategies	<p>13. Uses a wide variety of instructional strategies and activities that are academically rigorous and highly engaging.</p> <p>14. Always ensures student learning through modeling, guided practice, and independent practice.</p> <p>15. Actively seeks and implements new instructional strategies.</p>	<p>16. Uses a sufficient variety of instructional strategies and activities that are academically rigorous and highly engaging.</p> <p>17. Consistently ensures student learning through modeling, guided practice, and independent practice.</p> <p>18. Seeks and implements new instructional strategies.</p>	<p>19. Limited in the variety of instructional strategies and/or not all activities are academically rigorous and highly engaging.</p> <p>20. Inconsistently uses modeling, guided practice, and independent practice.</p>	<p>21. May inappropriately rely on only one or two instructional strategies and activities, which are either not academically rigorous or engaging for students.</p> <p>22. Does not use modeling, guided practice, and independent practice with any regularity.</p>

TEACHER EVALUATION

Teacher's Name: _____ Grade Level and Subject: _____ Date of Evaluation: _____

<i>INSTRUCTION</i>	Advanced	Proficient	Working Towards	Needs Improvement
Reaching the Range of Learners in a Classroom	<p>23. Has established a consistent system of classroom procedures and assignments to reach a range of learners. These assignments are attainable to students with difficulties in the subject area and challenging to students who excel in the subject area.</p> <p>24. Constantly reflects on student learning to seek new ways to support students on both ends of the learning spectrum.</p>	<p>25. Regularly uses classroom assignments to reach a range of learners. These assignments are accommodating to those who have difficulty in the subject and those who excel in the subject area.</p> <p>26. Reflects on student learning to support students who have difficulties in the subject area.</p>	<p>27. Occasionally has individual assignments geared towards students with difficulties in the subject area and towards students who excel in the subject area, but most of the time, the teacher targets the average learner in the classroom.</p> <p>28. Rarely reflects on student learning and sometimes supports students on either end of the learning spectrum.</p>	<p>29. Does not use assignments to target different learners, and the teacher only targets the average learner in the classroom.</p> <p>30. Does not reflect on student learning and does not support students on either end of the learning spectrum.</p>

TEACHER EVALUATION

Teacher's Name: _____ Grade Level and Subject: _____ Date of Evaluation: _____

<i>INSTRUCTION</i>	Advanced	Proficient	Working Towards	Needs Improvement
Pace of Instruction	<p>31. Pace of instruction is always highly efficient, engaging, and urgent.</p> <p>32. Adjusts the pace of instruction according to the needs of the activity, appropriately varying the pace throughout the lesson.</p> <p>33. Classroom time is considered sacred and is used in a highly efficient manner.</p>	<p>34. Pace of instruction is usually efficient, engaging, and urgent.</p> <p>35. Usually adjusts the pace of instruction according to the needs of the activity, appropriately varying the pace throughout the lesson.</p> <p>36. Classroom time is clearly for teaching and learning.</p>	<p>37. Pace of instruction is inconsistently efficient, engaging, or urgent.</p> <p>38. Only occasionally adjusts the pace of instruction and does not appropriately vary the pace throughout the lesson.</p> <p>39. Most classroom time is for teaching and learning, but some time is lost in casual behavior.</p>	<p>40. Pace of instruction is not efficient, engaging, or urgent.</p> <p>41. Does not adjust the pace of instruction according to the needs of the activity and does not vary the pace throughout the lesson.</p> <p>42. Classroom time is not always for teaching and learning. Explanation:</p>

TEACHER EVALUATION

Teacher's Name: _____ Grade Level and Subject: _____ Date of Evaluation: _____

<i>INSTRUCTION</i>	Advanced	Proficient	Working Towards	Needs Improvement
Classroom Environment	<p>43. Creates and frequently updates attractive bulletin boards and instructional and inspirational signage that supports student learning, including the Blackboard Configuration.</p> <p>44. Quality and updated student work is posted inside/ The classroom is well organized, neat and free of clutter. Classroom Binders are consistently well maintained.</p>	<p>45. Creates and regularly updates bulletin board boards and visual displays to support student learning, including the Blackboard Configuration.</p> <p>46. The classroom is organized and free of clutter.</p>	<p>47. Has bulletin boards and visual displays that may be out of date or simply decorative, but the Blackboard Configuration is present.</p> <p>48. The classroom is somewhat disorganized or cluttered.</p>	<p>49. Does not use bulletin boards and visual displays to support student learning, and/or the Blackboard Configuration is inadequate.</p> <p>50. The classroom is disorganized and/or cluttered.</p> <p>51. Not a positive learning environment</p>

COMMENTS ON INSTRUCTION:

Strengths:

Areas for Growth and Action Plans:

TEACHER EVALUATION

Teacher's Name: _____ Grade Level and Subject: _____ Date of Evaluation: _____

ASSESSMENT	Advanced	Proficient	Working Towards	Needs Improvement
Classroom Assessments	<p>52. Classroom assessments are models for measuring student learning.</p> <p>53. Classroom assessments cover all skill and content material as outlined in the curriculum.</p> <p>54. Classroom assessments are aligned with classroom activities and school assessments.</p> <p>55. Assessments are given at least every other week.</p>	<p>56. Classroom assessments cover all skill and content material as outlined in the curriculum.</p> <p>57. Classroom assessments are aligned with classroom activities and school assessments.</p> <p>58. Assessments are given with enough frequency to monitor student learning.</p>	<p>59. Classroom assessments inconsistently cover the skill and content material as outlined in the curriculum.</p> <p>60. Classroom assessments may be inconsistently aligned with classroom activities and school assessments.</p> <p>61. Classroom assessments are given infrequently.</p>	<p>62. Classroom assessments are not closely linked to the skill and content material as outlined in the curriculum and/or</p> <p>63. Classroom assessments are not aligned with classroom activities and school assessments.</p>
Checking for Understanding and Responsiveness to Daily Student Learning	<p>64. Adeptly, efficiently and frequently uses a variety of checking for understanding techniques to constantly monitor student learning.</p> <p>65. Frequently and consistently uses higher order thinking questions to push student thinking</p>	<p>68. Consistently uses a sampling of checking for understanding techniques to constantly monitor student learning.</p> <p>69. Often uses higher order thinking questions to push student thinking</p> <p>70. Usually uses real-time data to adjust instruction.</p>	<p>72. Occasionally uses a few checking for understanding techniques to monitor student learning.</p> <p>73. Sometimes, but not consistently, uses higher order thinking questions to push student thinking</p>	<p>76. Does not employ techniques to check for understanding and plows ahead without monitoring student understanding.</p> <p>77. Does not use higher order thinking questions to push student thinking</p> <p>78. Does not use real-time data to adjust instruction.</p>

TEACHER EVALUATION

Teacher's Name: _____ Grade Level and Subject: _____ Date of Evaluation: _____

ASSESSMENT	Advanced	Proficient	Working Towards	Needs Improvement
	<p>66. Always uses real-time data to adjust instruction.</p> <p>67. Unrelentingly focuses on student mastery of specific objectives</p>	<p>71. Usually focuses on student mastery of specific objectives</p>	<p>74. Sometimes uses real-time data to adjust instruction.</p> <p>75. Inconsistently focuses on student mastery of objectives</p>	<p>79. Does not focus on student mastery of objectives</p>
Ability to Analyze Assessment Results	<p>80. Analyzes classroom and school assessment results in ways that are highly effective in the understanding of student learning needs.</p> <p>81. Thoroughly plans with detail to address learning needs.</p> <p>82. Always implements the plans, incorporating them seamlessly into daily lesson plans and adjusting them as necessary.</p>	<p>83. Analyzes classroom and school assessment results in ways that are often effective in the understanding of student learning needs.</p> <p>84. Thoroughly plans to address learning needs post-assessment.</p> <p>85. Implements that plan as written and ensures that re-teaching a spiraling happens.</p>	<p>86. Does not thoroughly analyze assessment results to understand student progress and learning needs.</p> <p>87. Only puts in minimal effort in developing plans to address learning needs post assessment. Lacks detail and thoughtful analysis</p> <p>88. Inconsistent in implementing that plan as written so that re-teaching and spiraling does not always happen.</p>	<p>89. Little evidence that teacher uses assessment results to understand student progress and learning needs.</p> <p>90. Does not plan to address learning needs post-assessment, or the plan is inadequate.</p> <p>91. Does not follow through on plan.</p>

TEACHER EVALUATION

Teacher's Name: _____ Grade Level and Subject: _____ Date of Evaluation: _____

ASSESSMENT	Advanced	Proficient	Working Towards	Needs Improvement
Appropriateness of Response to Assessment Results	<p>92. Provides fair, accurate, and constructive feedback to students on their progress, especially after a major assessment.</p> <p>93. Graded work is returned quickly.</p> <p>94. Always takes full responsibility for student failure and constantly works to respond to the students' learning needs.</p> <p>95. Uses tutoring strategically to address student learning needs.</p>	<p>96. Usually provides fair, accurate, and constructive feedback to students on their progress, especially after a major assessment.</p> <p>97. Graded work is returned within a reasonable amount of time.</p> <p>98. Takes full responsibility for student failure and works to respond to the students' learning needs.</p> <p>99. Uses tutoring as a way to address needs.</p>	<p>100. Inconsistently provides fair, accurate, and/or constructive feedback to students on their progress.</p> <p>101. Graded work is returned to students late.</p> <p>102. Does not always take full responsibility for student failure, allowing large numbers of students to fail.</p> <p>103. Does not use tutoring strategically.</p>	<p>104. Does not provide timely, fair, accurate, and constructive feedback to students on their progress.</p> <p>105. Graded work is returned very late or not at all, and the teacher does not grade an adequate number of assignments.</p> <p>106. Does not always take full responsibility for student failure, allowing large numbers of students to fail and/or lowering expectations to let student pass too easily. Blames students for failure</p>
Students' Level of Growth on NSA Assessments	<p>107. Students have met or exceeded the North Star goal of 75 percent over 75% proficiency on the latest North Star assessment in the areas for which the teacher is responsible.</p>	<p>108. Students have scored between 65 and 74 percent over 75% proficiency on the latest North Star Assessment in the areas for which the teacher is responsible.</p>	<p>109. Students have scored between 45% and 64% over seventh –five percent proficiency on the latest North Star Assessment in the areas for which the teacher is responsible.</p>	<p>110. Students have scored below 45% percent correct on the latest North Star Assessment in the areas for which the teacher is responsible.</p>



TEACHER EVALUATION

Teacher's Name: _____ Grade Level and Subject: _____ Date of
Evaluation: _____

COMMENTS ON ADAPTING INSTRUCTION AND ASSESSMENT:

Strengths:

Areas for Growth and Action Plans:

TEACHER EVALUATION

Teacher's Name: _____ Grade Level and Subject: _____ Date of Evaluation: _____

<i>CURRICULUM</i>	Advanced	Proficient	Working Towards/Fair	Needs Improvement
Curriculum Plan	111. Curriculum plan for teacher's content area earned "Advanced" on the Curriculum Planning Rubric.	112. Curriculum plan for teacher's content area earned "Proficient" on the Curriculum Planning Rubric.	113. Curriculum plan for teacher's content area was "Working Towards" on the Curriculum Planning Rubric.	114. Curriculum plan for teacher's content area earned "Needs Improvement" on the Curriculum Planning Rubric. 115. Feedback was not incorporated.
Lesson Design	116. Lessons are clearly aligned with the objectives that are outlined in the curriculum. 117. All mastery objectives are student-centered, measurable, attainable, and challenging. 118. Lessons are highly detailed, with scripted questions, anticipated challenges, and interspersed checking for understanding. 119. Goals and objectives are always	121. Lessons are aligned with the content and skill objectives that are outlined in the curriculum. 122. Most mastery objectives meet all of the following criteria: student-centered, measurable, attainable, and challenging. 123. Lessons are detailed, with some scripted questions, and interspersed checking for understanding. 124. Goals and objectives are frequently	126. Lessons are inconsistently aligned with the content and skill objectives that are outlined in the curriculum. 127. Mastery objectives consistently fail to meet one of the following criteria: student-centered, measurable, attainable, and challenging. 128. Lessons have a basic outline of activities with no scripted questions or interspersed checking for understanding.	131. Lessons are regularly not aligned with the content and skill objectives that are outlined in the curriculum. 132. Mastery objectives consistently fail to meet one of the following criteria: student-centered, measurable, attainable, and challenging. 133. Lessons are superficial and incomplete. 134. Goals and objectives are not being

TEACHER EVALUATION

Teacher's Name: _____ Grade Level and Subject: _____ Date of Evaluation: _____

	<p>being satisfied through the lesson's activities.</p> <p>120. All activities and objectives are well-aligned</p>	<p>being satisfied through the lesson's activities.</p> <p>125. Activities and objectives are well-aligned</p>	<p>129. Goals and objectives are inconsistently being satisfied through the lesson's activities.</p> <p>130. Activities are not always aligned with objectives</p>	<p>satisfied through the lesson's activities.</p> <p>135. Activities and objectives are not aligned</p>
Lesson Materials	<p>136. All student materials are always rigorous, attractive, error-free, and conducive to high-quality work.</p>	<p>137. Most student materials are rigorous, attractive, error-free, and conducive to high-quality work.</p>	<p>138. Student materials are inconsistently rigorous, attractive, error-free, and conducive to high-quality work.</p>	<p>139. Student materials consistently fail to meet more than one of the following criteria: rigor, attractiveness, error-free, and conducive to high-quality work.</p>
Modification of Material for Students with Special Needs	<p>140. Always makes necessary curriculum modifications for students with special needs, communicating frequently with the learning specialist.</p> <p>141. Assumes full responsibility for student achievement and seeks innovative ways to support them.</p>	<p>142. Usually makes necessary curriculum modifications for students with special needs, communicating regularly with the learning specialist(s).</p> <p>143. Assumes full responsibility for supporting these students.</p>	<p>144. Inconsistently makes curriculum modifications for students with special needs and inconsistently communicates with the learning specialist(s).</p> <p>145. Does not always assume full responsibility for supporting these students.</p>	<p>146. Does not make necessary curriculum modifications for students with special needs and/or does not communicate with the learning specialist(s).</p> <p>147. Fails to assume full responsibility for supporting these students.</p>



TEACHER EVALUATION

Teacher's Name: _____ Grade Level and Subject: _____ Date of
Evaluation: _____

COMMENTS ON CURRICULUM:

Strengths:

Areas for Growth and Action Plans:

TEACHER EVALUATION

Teacher's Name: _____ Grade Level and Subject: _____ Date of Evaluation: _____

<i>CLASSROOM MANAGEMENT</i>	Advanced	Proficient	Working Towards	Needs Improvement
Classroom Tone: Strong Voice and Positive Framing	<p>148. The tone of classroom is always efficient, respectful and positive.</p> <p>149. Frequently narrates positive student behaviors (rather than calling out the negative) and uses praise, challenge and talking aspiration to motivate the students.</p> <p>150. Always builds compliance through economy of language, quiet power, do not talk over, square up/stand still, and nonverbal authority.</p>	<p>151. The general tone of the classroom is efficient, respectful and positive.</p> <p>152. Narrates positive student behaviors (rather than calling out the negative) and uses praise, challenge and talking aspiration to motivate the students.</p> <p>153. Often builds compliance through economy of language, quiet power, do not talk over, square up/stand still, and nonverbal authority.</p>	<p>154. The general tone of the classroom is inconsistent in efficiency, respectfulness, and positivity.</p> <p>155. Sometimes narrates negative student behaviors OR inconsistently uses praise, challenge or aspiration to motivate students.</p> <p>156. Rarely builds compliance through economy of language, quiet power, do not talk over, square up/stand still, and nonverbal authority.</p>	<p>157. The general tone of classroom is inefficient and/or negative.</p> <p>158. Does not use positive framing, and does not work to motivate students.</p> <p>159. Does not use economy of language, quiet power, do not talk over, square up/stand still, and nonverbal authority.</p>

TEACHER EVALUATION

Teacher's Name: _____ Grade Level and Subject: _____ Date of Evaluation: _____

<i>CLASSROOM MANAGEMENT</i>	Advanced	Proficient	Working Towards	Needs Improvement
Alignment with School Culture	<p>160. School rules, values, and STARS behaviors are clearly enforced and emphasized.</p> <p>161. Implements a multitude of management strategies so well that the class appears to have few if any management problems.</p>	<p>162. School rules, values, and STARS behaviors are mostly enforced and emphasized.</p> <p>163. Implements several management strategies well so that the class has minimal management problems.</p>	<p>164. School rules, values, and STARS behaviors are enforced and emphasized but with mixed effectiveness.</p> <p>165. Implements management strategies but with mixed effectiveness. Student behaviors can distract learning.</p>	<p>166. Does not enforce or emphasize school rules, values, and STARS.</p> <p>167. Management strategies are generally not employed or employed ineffectively.</p> <p>168. Classroom learning suffers from a lack of management.</p>

TEACHER EVALUATION

Teacher's Name: _____ Grade Level and Subject: _____ Date of Evaluation: _____

<i>CLASSROOM MANAGEMENT</i>	Advanced	Proficient	Working Towards	Needs Improvement
Classroom Procedures and What to Do	<p>169. There is always a prompt start, smooth finish to class.</p> <p>170. The classroom runs like clockwork, and students seem routinized to all procedures.</p> <p>171. Hallway transitions are a model of silent efficiency.</p> <p>172. Gives What to do directions that are specific, concrete, sequential, and observable.</p> <p>173. Always narrates compliance instead of narrating what not to do.</p>	<p>174. There is usually a prompt start, a smooth finish to class.</p> <p>175. The classroom runs efficiently, and students seem routinized to all procedures.</p> <p>176. Hallway transitions are smooth, silent and efficient.</p> <p>177. Gives What to Do directions that are specific, concrete, sequential, and observable, but sometimes the directions need to be rephrased.</p> <p>178. Usually narrates compliance instead of narrating what not to do.</p>	<p>179. The class may not have a prompt start or a smooth finish.</p> <p>180. Some classroom routines are efficient, while others are not, causing a lack of flow in the classroom.</p> <p>181. Hallway transitions are not consistently silent and efficient.</p> <p>182. Sometimes gives directions that are not specific, concrete, sequential and/or observable.</p> <p>183. Sometimes narrates what not to do.</p>	<p>184. The classroom does not have a prompt start or a smooth finish.</p> <p>185. There are no clear routines OR routines are poorly executed, causing a lack of flow in the class.</p> <p>186. Hallway transitions are inefficient and/or noisy.</p> <p>187. Gives directions that are vague and difficult to follow/understand.</p> <p>188. Often narrates what not to do.</p>

TEACHER EVALUATION

Teacher's Name: _____ Grade Level and Subject: _____ Date of Evaluation: _____

<i>CLASSROOM MANAGEMENT</i>	Advanced	Proficient	Working Towards	Needs Improvement
Level of On Task Behavior and 100%	<p>189. In a lesson, all students are on task at all times, and there are no side conversations.</p> <p>190. The teacher always notices and addresses off-task behavior.</p> <p>191. If a student moves off task, teacher immediately addresses the student always using the least invasive form of intervention and without major adjustments to the pace of instruction.</p>	<p>192. In a lesson, nearly all students are on task at all times, and there are few, if any side conversations.</p> <p>193. The teacher usually notices and addresses off-task behavior.</p> <p>194. If a student moves off task, teacher immediately addresses the student frequently using the least invasive form of intervention.</p>	<p>195. In a lesson, 80% of students are consistently on task.</p> <p>196. The teacher does not always notice AND/OR address off-task behavior</p> <p>197. The teacher does not consistently use the least invasive form of intervention.</p>	<p>198. In a lesson, fewer than 80% of students are on task.</p> <p>199. The teacher usually does not notice off-task behavior AND/OR address off task behavior.</p> <p>200. The teacher does not use the least invasive form of intervention, and much class time is wasted with efforts to refocus the class.</p>

TEACHER EVALUATION

Teacher's Name: _____ Grade Level and Subject: _____ Date of Evaluation: _____

<i>CLASSROOM MANAGEMENT</i>	Advanced	Proficient	Working Towards	Needs Improvement
Ability to Refocus a Class and Do It Again	<p>201. Always recognizes the need to refocus a class.</p> <p>202. Successfully uses Do It Again when appropriate, and moments of Do It Again are always positive and end in success.</p> <p>203. There is little recognizable need for Do It Again because there is 100% compliance.</p>	<p>204. Usually recognizes the need to refocus a class.</p> <p>205. Successfully uses Do It Again when appropriate, and moments of Do It Again are usually positive and end in success.</p> <p>206. There is only an occasional need for Do it Again because compliance is happening consistently.</p>	<p>207. Inconsistently recognizes the need to refocus a class and may allow problems to escalate.</p> <p>208. Does not always use Do It Again when appropriate, and/or moments of Do It Again do not always end in success.</p>	<p>209. Demonstrates an inability to recognize when a class needs to be refocused and/or lets problems escalate.</p> <p>210. Use of Do It Again escalates problems rather than refocuses students.</p>

TEACHER EVALUATION

Teacher's Name: _____ Grade Level and Subject: _____ Date of Evaluation: _____

<i>CLASSROOM MANAGEMENT</i>	Advanced	Proficient	Working Towards	Needs Improvement
Dealing with Challenging Situations and Students	<p>211. Always deals appropriately with challenging situations and students without derailing the learning process.</p> <p>212. Deftly applies elements of strong voice to address challenges.</p> <p>213. Does not ever engage in student excuses/distractions during correction of student misbehavior.</p> <p>214. Students nearly always respond to correction respectfully and with compliance.</p> <p>215. Always knows when and how to diffuse situations with students and/or when to involve school leaders.</p>	<p>216. Normally deals in an appropriate way with challenging situations and students.</p> <p>217. Applies elements of strong voice to address challenges.</p> <p>218. Rarely engages student excuses/distractions during correction of student misbehavior.</p> <p>219. Students usually respond to correction respectfully and with compliance.</p> <p>220. Usually knows when and how to diffuse these situations and/or when to involve school leaders.</p>	<p>221. Does not consistently deal in an appropriate way with challenging situations and students.</p> <p>222. Inconsistently applies elements of strong voice and students do not comply.</p> <p>223. Sometimes engages in student excuses/distractions during correction of student behavior.</p> <p>224. Inconsistently respond to correction respectfully and with compliance.</p> <p>225. Does not always know when and how to diffuse these situations, sometimes escalating problems. The teacher may be too reliant on or does not utilize school leaders.</p>	<p>226. Has difficulty dealing with challenging situations and students AND/OR does not deal with them appropriately.</p> <p>227. Does not apply elements of strong voice and students do not respond respectfully and/or do not comply.</p> <p>228. Often engages in student excuses/distractions during correction of student behavior.</p> <p>229. Students do not respond respectfully and/or with compliance, resulting in escalated problems which cause an unsafe or off-task learning environment.</p> <p>230. Over-reliant on or does not involve school leaders at appropriate times.</p>

TEACHER EVALUATION

Teacher's Name: _____ Grade Level and Subject: _____ Date of Evaluation: _____

<i>CLASSROOM MANAGEMENT</i>	Advanced	Proficient	Working Towards	Needs Improvement
Relationships with Students	<p>231. Creates a climate of caring in the classroom by addressing students in a respectful and positive manner.</p> <p>232. Positive relationships with students support learning in the classroom.</p> <p>233. Demonstrates open concern and develops a sense of responsibility for students' academic and personal growth. Teacher demonstrates that s/he will not give up on students.</p>	<p>234. Addresses students in a respectful and professional manner.</p> <p>235. Positive relationships with students usually support learning in the classroom.</p> <p>236. Willing to go above and beyond to help students.</p>	<p>237. Does not consistently address students in a professional manner</p> <p>238. Fails to establish positive relationships with students that support learning.</p>	<p>239. Does not address students in a professional manner.</p> <p>240. Relationships with students are inappropriate. Explanation:</p>

COMMENTS ON CLASSROOM MANAGEMENT:

Strengths:

Areas for Growth and Action Plans:

TEACHER EVALUATION

Teacher's Name: _____ Grade Level and Subject: _____ Date of Evaluation: _____

<i>PROFESSIONALISM</i>	Advanced	Proficient	Working Towards	Needs Improvement
Relationships with Families	<p>241. Communicates regularly and often with families to inform them of the instructional program, as well as shares observations about the emotional and social development of the students.</p> <p>242. Makes frequent, usually pro-active phone calls, keeping parents informed of successes and struggles.</p> <p>243. Returns all phone calls from families within 24 hours.</p>	<p>244. Communicates frequently with families to inform them of the instructional program and student progress.</p> <p>245. Makes regular, sometimes pro-active phone calls, keeping parents informed of successes and struggles.</p> <p>246. Returns most phone calls from families within 24 hours.</p>	<p>247. Communicates sporadically with families to inform parents of the instructional program and student progress.</p> <p>248. Makes infrequent phone calls, keeping parents informed of successes and struggles OR phone calls are usually reactive.</p> <p>249. Does not consistently return phone calls from families within 24 hours.</p>	<p>250. Makes little or no attempt to inform families of student progress.</p> <p>251. Rarely makes phone calls to parents.</p> <p>252. Does not regularly return phone calls to parents.</p>
Relationships with Colleagues/ School	<p>253. Relationships with colleagues are extremely positive, collaborative, and generous.</p> <p>254. Assumes leadership among colleagues, often supporting them and engaging in professional exchange.</p>	<p>256. Relationships with colleagues are positive and collaborative.</p> <p>257. Regularly engages in professional exchange with colleagues.</p> <p>258. Upbeat, positive and does not complain often.</p>	<p>259. Relationships with colleagues are uneven, and collaboration is not consistently evident.</p> <p>260. Occasionally engages in professional exchange with colleagues.</p>	<p>262. Relationships with colleagues negatively affect the working environment, and collaboration is not evident.</p> <p>263. Rarely engages in professional exchange with colleagues.</p>

TEACHER EVALUATION

Teacher's Name: _____ Grade Level and Subject: _____ Date of Evaluation: _____

<i>PROFESSIONALISM</i>	Advanced	Proficient	Working Towards	Needs Improvement
	255. Exerts a positive influence on the entire staff.		261. Can be negative and or complain about school, job, and kids.	264. Complains frequently and is negative about the school/job/kids.
Additional Contributions and Responsibilities	265. Puts in an extraordinary amount of time and effort to contribute to student and school success. 266. Independently assumes additional responsibilities when necessary and demonstrates leadership. 267. Always willing to lead and /or pitch in with events or other school needs.	268. Puts in extra time and effort to contribute to student and school success. 269. Often assumes additional responsibilities when necessary, especially when asked. 270. Willing to pitch in and help with events or school needs.	271. Puts in sufficient time and effort to contribute to student and/or school success. 272. Occasionally assumes additional responsibilities.	273. Puts in minimal time and effort to contribute to student and school success. 274. Does not assume additional responsibilities.
Timeliness (School Day, Classes, Meetings)	275. Always punctual for the school day, scheduled classes/pick-up times, and/or meetings.	276. Usually punctual for the school day, scheduled classes/pick-up times, and/or meetings.	277. Inconsistently punctual for the school day, scheduled classes/pick-up times, and/or meetings.	278. Rarely on time for the school day, scheduled classes/pick-up times, and/or meetings.
Urgency	279. Always communicates a tangible sense of urgency in tone, movement, intensity,	280. Mostly communicates a sense of urgency (tone, movement, intensity,	281. Inconsistently communicates a sense of urgency (tone, movement, intensity,	282. Fails to communicate a sense of urgency (tone, movement, intensity,

TEACHER EVALUATION

Teacher's Name: _____ Grade Level and Subject: _____ Date of Evaluation: _____

<i>PROFESSIONALISM</i>	Advanced	Proficient	Working Towards	Needs Improvement
	enthusiasm and preparation.	enthusiasm and preparation).	enthusiasm and preparation).	enthusiasm and preparation).
Ability to Meet Deadlines	283. Always meets deadlines for lesson plans, progress reports, and/or report cards, as well as assessment analysis/reflections.	284. Usually meets deadlines for lesson plans, progress reports, and/or report cards as well as assessment analysis/reflections.	285. Inconsistently meets deadlines for lesson plans, progress reports, and/or report cards, as well as assessment analysis/reflections which may inconvenience self, colleagues, and/or leaders.	286. Consistently does not make deadlines for lesson plans, progress reports, and/or report cards as well as assessment analysis/reflections, which inconveniences self, colleagues, and/or leaders.
Professional Dress and Attitude	287. Dress always models professional attire. 288. Attitude is positive and respectful of students, families, colleagues, and school leaders. 289. Always positive during staff meetings and participates actively.	290. Dress is professional. 291. Attitude is respectful of students, families, colleagues, and school leaders. 292. Professional during staff meetings and participates often.	293. Dress is mostly professional. 294. Attitude is inconsistently professional with students, families, colleagues, and/or school leaders. 295. Sometimes disengaged in staff meetings and/or participates infrequently.	296. Dress is not professional. 297. Attitude is negative, inappropriate, and/or disrespectful to students, families, colleagues, and school leaders. 298. Usually disengaged in staff meetings and does not participate frequently.

COMMENTS ON PROFESSIONALISM:



TEACHER EVALUATION

Teacher's Name: _____ Grade Level and Subject: _____ Date of
Evaluation: _____

Strengths:

Areas for Growth and Action Plans:

TEACHER EVALUATION

Teacher's Name: _____ Grade Level and Subject: _____ Date of Evaluation: _____

<i>PROFESSIONAL DEVELOPMENT</i>	Advanced	Proficient	Working Towards	Needs Improvement
Professional Development Participation and Implementation	299. Has a leadership presence in professional development workshops. 300. Actively seeks out and implements professional development strategies in his/her classroom. 301. Successfully and quickly implements strategies presented in workshops in lesson plans and presents evidence in video. 302. Actively supports other teachers in their developed expertise.	303. Actively participates in professional development workshops. 304. Actively seeks out and implements professional development strategies in his/her classroom. 305. Successfully implements strategies presented in workshops in lesson plans and presents evidence in video	306. Sometimes participates actively in professional development workshops. 307. Occasionally seeks out and implements professional development strategies in his/her classroom. 308. Sometimes implements strategies presented in workshops, but does so inconsistently in lesson plans and/or video.	309. Not an active participant in professional development workshops. 310. Does not take steps to seek out or utilize professional development strategies. 311. Rarely implements new strategies presented in workshops.
Openness to Feedback	312. Consistently seeks leader's support at appropriate times. 313. Eagerly reflects upon and responds to feedback with openness and a "good to great" attitude.	315. Frequently seeks leader's support at appropriate times. 316. Reflects upon and responds to feedback with openness. 317. Implements feedback from school	318. Seeks leader's support infrequently, or not at appropriate times 319. Inconsistently reflects upon and responds to feedback OR does not always have an open attitude.	321. Does not seek leader's support at necessary times. 322. Does not reflect upon or respond to feedback AND does not accept feedback with openness.



TEACHER EVALUATION

Teacher's Name: _____ Grade Level and Subject: _____ Date of
Evaluation: _____

<i>PROFESSIONAL DEVELOPMENT</i>	Advanced	Proficient	Working Towards	Needs Improvement
	314. Immediately implements feedback from school leaders and instructional leaders.	leaders and instructional leaders.	320. Does not implement feedback from school leaders or instructional leaders in a timely or consistent manner.	323. Does not implement feedback from school leaders or instructional leaders.



TEACHER EVALUATION

Teacher's Name: _____ Grade Level and Subject: _____ Date of
Evaluation: _____

Teacher Reply Form for Mid Year Evaluation

After reading my evaluation...

I am pleased about:

- 1.
- 2.
- 3.
- 4.

I plan to work on the following goals:

- 5.
- 6.
- 7.
- 8.

I have questions about or could use assistance with:

- 9.

Signature of Leader Date

Signature of Teacher

Date



Catalyst: Bremerton

Section 22: Attachment 22

Contents:

- Pre-opening Professional Development Schedule

Section 22: Attachment 22

Professional Development Schedule

Professional Development at Catalyst is embedded in teacher work weeks and takes place weekly during Wednesday early release time and during the following full-day meeting times:

- Four Full PD Weeks: scheduled to take place before the start of the school year
- Six Full PD Days: scheduled in September, November, December, February, March, and May

In addition, teachers have common planning times in which they have Data Meetings and Team Meetings.

At Catalyst we participate in over 40 days, or more than 325 hours, of professional development per year. This does not include additional opportunities requested in teachers' Professional Growth Plans. The table below serves as a sample of what will take place to build team and prepare teachers to deliver any unique or challenging aspects of the curriculum beginning in the summer of 2020. (See Annual Calendar in **Section 7: Attachment 6**).

Topic	Description	Time of Year	Resources
Mission, Vision, Values and Community	Teachers study the vision, mission, and core values of Catalyst. We use constructivist listening to build relationship with one another while simultaneously finding ourselves in these foundational documents. Teachers engage with community via Personal Experience Panels.	Summer 2020	National Equity Project "Leading for Equity Leading from the Inside-Out" Community Members
Diversity Equity and Inclusiveness	Quarterly book/article studies Teachers learn and experience the protocols and practices we use at Catalyst: <ul style="list-style-type: none">• Constructivist listening• Discourse I and II• Green Line Framework• Affinity Groups• Empathy Interviewing	Throughout Year	<u>Everyday Anti-Racism</u> , Mica Pollock <u>Culturally Responsive Teaching and the Brain</u> , Zaretta Hammond <u>The Art of Coaching</u> , Elea Aguilar <u>Other People's Children</u> , Lisa Delpit National School Reform Faculty National Equity Project "Leading for Equity Leading from the Inside-Out"

Topic	Description	Time of Year	Resources
Observation and Feedback: A tool for teacher practice and growth	Teachers learn how Observation and Feedback functions at Catalyst with regard to classroom and school culture and rigor.	Summer 2020	<u>Get Better Faster</u> , Paul Bambrick Santoyo
Weekly Data Meetings, the Power of DDI and School-Wide Assessments	Teachers learn about the power of data-driven instruction and data meetings including expectations for lesson plans, lesson materials, and assessment preparation and next steps. Teachers learn how to administer school-wide assessments and protocols	Summer 2020	<u>Leverage Leadership 2.0</u> , Uncommon Schools Catalyst Learning Management System and Trackers (TBD) STEP, MAP
Catalyst Instructional Practices	Teachers learn and experience the curriculum for core content.	Summer 2020	<u>Culturally Responsive Teaching and the Brain</u> , Zaretta Hammond <u>Teach Like a Champion</u> , Doug Lemov
Change-Maker Space and Passion Projects	Teachers learn the rationale and vision for Change-Maker Space and Passion Projects, review exemplars for units and projects, and create plans for the first unit of study.	Summer 2020	
Safety and Child Abuse: Trauma-informed best practice	Trauma-informed schools create structures that are predictable and consistent, particularly around transitions and classroom expectations. Teachers will learn to incorporate trauma-informed best practice into their routines to ensure a sense of belonging.	Summer 2020	OSPI School Safety Center and articles/research on trauma-informed best practice, including Nadia Burke Harris's work and ACEs Study: <i>"The Impact of Adverse Childhood Experiences and toxic stress on childhood and development"</i>

Topic	Description	Time of Year	Resources
Health and Safety Training	<p>This includes a minimum of:</p> <ul style="list-style-type: none"> • Bloodborne Pathogen Exposure Prevention • Child Abuse, Neglect, and Exploitation Prevention (mandated reporting) • Youth Suicide: Awareness and Prevention • CPR/First Aid • Health Emergencies: <ul style="list-style-type: none"> ○ Life Threatening Allergies ○ Seizures 	Summer 2020	<p>Washington Schools Risk Management PoolOnline trainings</p> <p>Red Cross</p> <p>True Measure Collaborative's Learning Management System training modules</p>
Intervention and Support for Scholars of Special Populations	<p>Because Catalyst believes that inclusion as much of the time is best for all scholars, this section of sessions will provide information and practice opportunities on the most effective strategies for education our special populations of scholars.</p>	Summer 2020	<p>Seneca Family Agencies / True Measure Collaborative</p> <p>Olympic Educational Services District</p>
School Operations and Employee Handbook Overview	<p>Become familiar with and learn processes for school operations including and not limited to:</p> <ul style="list-style-type: none"> • Discipline actions • Attendance • Requesting time off • Daily schedule • Non-student days • Benefits 	Summer 2020	<p>Director of Finance and Operations; Co-Founders</p> <p>Vendor Representatives</p> <p>Discipline Revolution Project</p>



Catalyst: Bremerton

Section 23: Attachment 23

Contents:

- Mission-Specific Goals Form



Mission-Specific Goals

This form is intended to launch the individual tailoring of the Commission *Performance Framework* for each school. As part of our goal to develop a *Performance Framework* that builds upon the evaluation lens utilized by the state, we believe each school's framework should contain measures that are representative of your individual program. Please incorporate your mission-specific goals on this form. There should be one table completed for each proposed measure. All measures are subject to modification and approval by the Commission. For any questions, please contact: Paula Kitzke, Deputy Director, paula.kitzke@k12.wa.us

<u>School Mission and Vision</u>	<p><i>Mission</i> Catalyst: Bremerton supports our diverse scholars to live full lives and to succeed in college, career, and life. Scholars will find their purpose and passion so that they can cultivate the critical hope, optimism, and leadership essential to be catalysts in their community and world.</p> <p><i>Vision</i> Catalyst: Bremerton's graduates build a strong understanding of themselves, envision the world in which they want to live, and develop the agency to access the future of their dreams.</p>
<u>Goal Name</u>	<p>Student Academic Goal #1: Reading and Mathematics Growth</p>
<u>Indicator</u> <i>Describe the indicator this goal will reflect. How is it different from the other goals used to evaluate this indicator (if in conjunction with more than one goal)? How is it different from other framework indicators?</i>	<p>This goal will measure the growth and overall achievement of our scholars in reading and math from grades 1-8. This measure is unique as it measures growth as well as provides data to show how scholars perform compared to a nationally normed set of students from across the country.</p>
<u>Mission-Specific Performance Goal</u> <i>Clear, measurable statement(s) of achievement reflecting the mission and tied to a specific period of time. How will you know you have achieved this goal?</i>	<p>Scholars at Catalyst will make one or more years of growth on the NWEA Map Growth assessment in both reading and math each year they attend the school.</p>

<u>Goal</u> <i>How will you quantify this goal? (You must identify the methodology used to determine, document, and calculate your goal. This can include a specific rate, calculation method, formula, and/or process, including specific definitions, such as pre-post qualifiers.)</i>	<p>Scholars will take the NWEA Map Growth assessment three times each academic year so that we can measure growth over time. There are few high-quality and standards-aligned assessments that not only provide mastery and proficiency data but also growth data. This assessment is externally validated, highly regarded, and provides reliable and accurate data for scholar performance.</p>
<u>Target-Setting Standards</u> <i>What do you expect to achieve using the metric detailed above? How will this translate into standards that align with Commission Performance Framework expectations? What are the proposed cut points?</i>	<p>Exceeds: Growth of 1.5 years or more</p> <p>Meets: Growth of 1.0 years or more</p> <p>Approaching: Growth of .8 years</p> <p>Does Not Meet: Growth of less than .8 of a year</p>
<u>Goal Selection Details</u> <i>Why is this goal important to your mission? Why is the chosen method of evaluation appropriate and useful for measuring performance toward this goal?</i>	<p>This goal is vital to our mission because we must ensure that scholars make enough progress in reading and math to not only meet goals for their given grade level, but to also accelerate gains to eliminate gaps in achievement that may exist. Further, there are not state assessments for students in grades 1-2, and MAP provides necessary growth tracking data.</p>

Updated: July 2, 2018

<u>School Mission and Vision</u>	<p><i>Mission</i></p> <p>Catalyst: Bremerton supports our diverse scholars to live full lives and to succeed in college, career, and life. Scholars will find their purpose and passion so that they can cultivate the critical hope, optimism, and leadership essential to be catalysts in their community and world.</p> <p><i>Vision</i></p> <p>Catalyst: Bremerton's graduates build a strong understanding of themselves, envision the world in which they want to live, and develop the agency to access the future of their dreams.</p>
<u>Goal Name</u>	<p>Organizational Effectiveness Goal #1: Equity and Staff Satisfaction</p>

<p><u>Indicator</u> Describe the indicator this goal will reflect. How is it different from the other goals used to evaluate this indicator (if in conjunction with more than one goal)? How is it different from other framework indicators?</p>	<p>This goal measures the extent to which we live our core design principles of equity, diversity, and inclusion. This is different than other framework indicators because it assesses a value that is important to the school.</p>
<p><u>Mission-Specific Performance Goal</u> Clear, measurable statement(s) of achievement reflecting the mission and tied to a specific period of time. How will you know you have achieved this goal?</p>	<p>At least 90% of staff will report being satisfied or highly satisfied on measures of staff engagement, and there will be no significant gaps in satisfaction along lines of race and/or ethnicity.</p>
<p><u>Goal</u> How will you quantify this goal? (You must identify the methodology used to determine, document and calculate your goal. This can include a specific rate, calculation method, formula, and/or process, including specific definitions, such as pre-post qualifiers.)</p>	<p>All members of our staff will take an organizational health and wellness survey at least twice per year. The survey will consist of internally created and externally validated items to assess overall satisfaction, job fit, and the strength of our organizational culture.</p>
<p><u>Target-Setting Standards</u> What do you expect to achieve using the metric detailed above? How will this translate into standards that align with Commission Performance Framework expectations? What are the proposed cut points?</p>	<p>Exceeds: An average response of staff engagement of over 90% with no significant gaps along lines of race/ethnicity</p> <p>Meets: 90% of staff report being satisfied/highly satisfied with no significant gaps along lines of race/ethnicity</p> <p>Approaching: 70% of staff report being satisfied/highly satisfied with no significant gaps along lines of race/ethnicity</p> <p>Does Not Meet: Less than 70% of staff report being satisfied/highly satisfied with no significant gaps along lines of race/ethnicity</p>
<p><u>Goal Selection Details</u> Why is this goal important to your mission? Why is the chosen method of evaluation appropriate and useful for measuring performance toward this goal?</p>	<p>We have a design principle for our school of equity. Because of this, it is vital that we ensure that we create a strong staff culture where all of our staff feel connected to school and find meaning in the work they do on a daily basis.</p>

Updated: July 2, 2018

<p><u>School Mission and Vision</u></p>	<p>Mission Catalyst: Bremerton supports our diverse scholars to live full lives and to succeed in college, career, and life. Scholars will find their purpose and passion so that they can cultivate the critical hope, optimism, and leadership essential to be catalysts in their community and world.</p> <p>Vision Catalyst: Bremerton's graduates build a strong understanding of themselves, envision the world in which they want to live, and develop the agency to access the future of their dreams.</p>
<p><u>Goal Name</u></p>	<p>Organizational Effectiveness Goal #2: World-Class Professional Development</p>
<p><u>Indicator</u> <i>Describe the indicator this goal will reflect. How is it different from the other goals used to evaluate this indicator (if in conjunction with more than one goal)? How is it different from other framework indicators?</i></p>	<p>World-class professional development is a core program term for Catalyst: Bremerton. This goal measures the extent to which we are delivering world-class professional development to our staff in the areas of instructional coaching, observation, and feedback.</p>
<p><u>Mission-Specific Performance Goal</u> <i>Clear, measurable statement(s) of achievement reflecting the mission and tied to a specific period of time. How will you know you have achieved this goal?</i></p>	<p>Instructional staff at Catalyst will report being satisfied/highly satisfied with the coaching and instructional support provided by their manager and will make significant growth in their classroom effectiveness as measured by professional growth plan goals and/or the teacher effectiveness rubric(s).</p>
<p><u>Goal</u> <i>How will you quantify this goal? (You must identify the methodology used to determine, document and calculate your goal. This can include a specific rate, calculation method, formula, and/or process, including specific definitions, such as pre-post qualifiers.)</i></p>	<p>All staff will create professional growth plans annually that are based on the Catalyst staff/teacher effectiveness rubrics. Additionally staff will complete an organizational health and wellness survey at least twice per year which will include items related to satisfaction with the support managers provide via instructional coaching meetings.</p>

<u>Target-Setting Standards</u> <i>What do you expect to achieve using the metric detailed above? How will this translate into standards that align with Commission Performance Framework expectations? What are the proposed cut points?</i>	<p>Exceeds: 90% or more of staff meet goal</p> <p>Meets: 80% or more of staff meet goal</p> <p>Approaching: 70% of staff meet goal</p> <p>Does Not Meet: Less than 70% of staff meet goal</p>
<u>Goal Selection Details</u> <i>Why is this goal important to your mission? Why is the chosen method of evaluation appropriate and useful for measuring performance toward this goal?</i>	<p>We know that the quality of teaching that occurs in each classroom is the most significant driver of student achievement. We also recognize that staff satisfaction with the support they receive is also a vital ingredient to ensuring that high-quality staff are retained at the school. These are mission-critical reasons that meeting these goals will be necessary.</p>

Updated: July 2, 2018



Catalyst: Bremerton

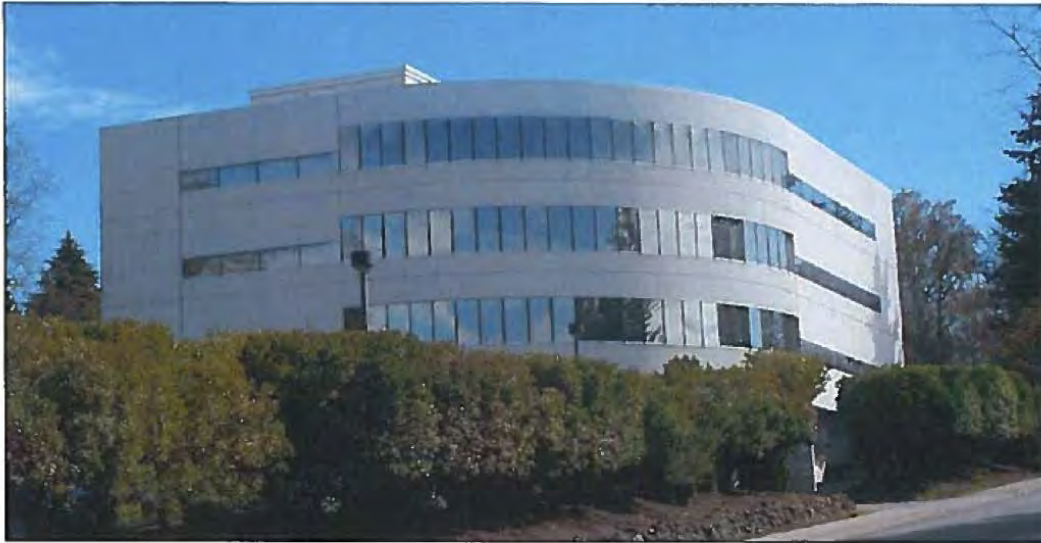
Section 24: Attachment 24

Contents:

- Viable Facilities Real Estate Listing
- Letter of Support, James Heugas, Vice-President, Washington Charter School Development
- Letter of Support, Amanda Sanchez, Pacific Northwest Region Director, Raza Development Fund
- Statement of Assurances Regarding Religious Facilities

OFFICE SPACE FOR LEASE

1300 Sylvan building, Bremerton, WA

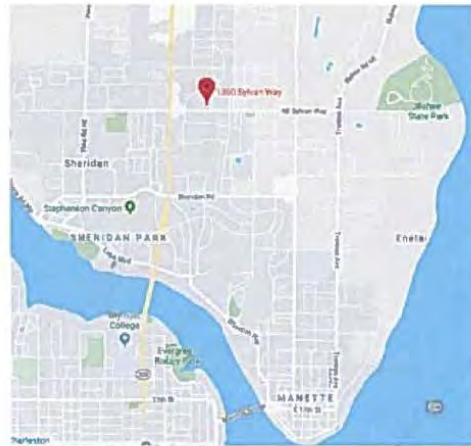


THE PROPERTY

- Located in East Bremerton – near Library
- 23,638 SF Available
- Plenty of on-site parking – 1 per 222 SF
- Beautiful views of the Olympic Mountains
- 4 level building with elevator & stairwells
- Well-maintained office building

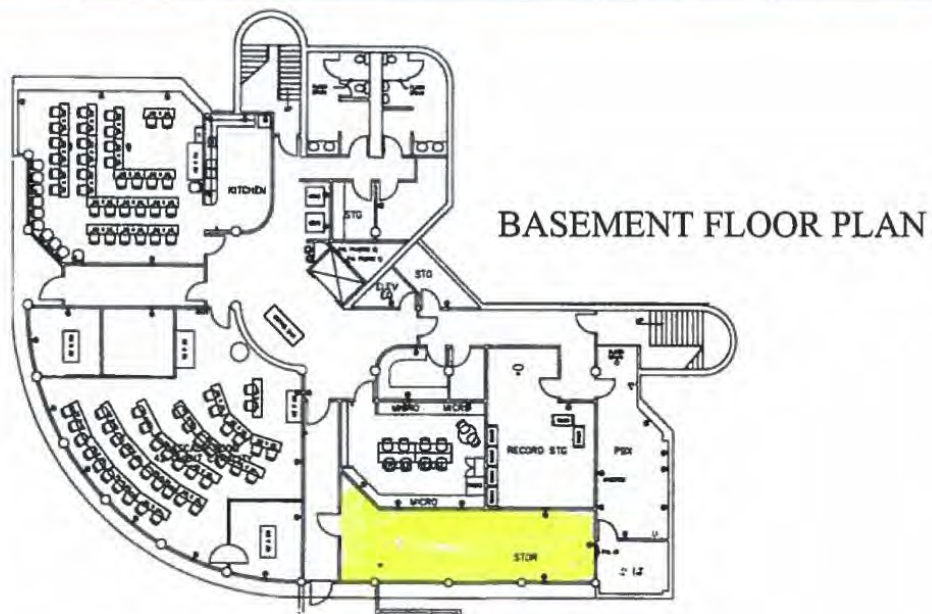
RATE

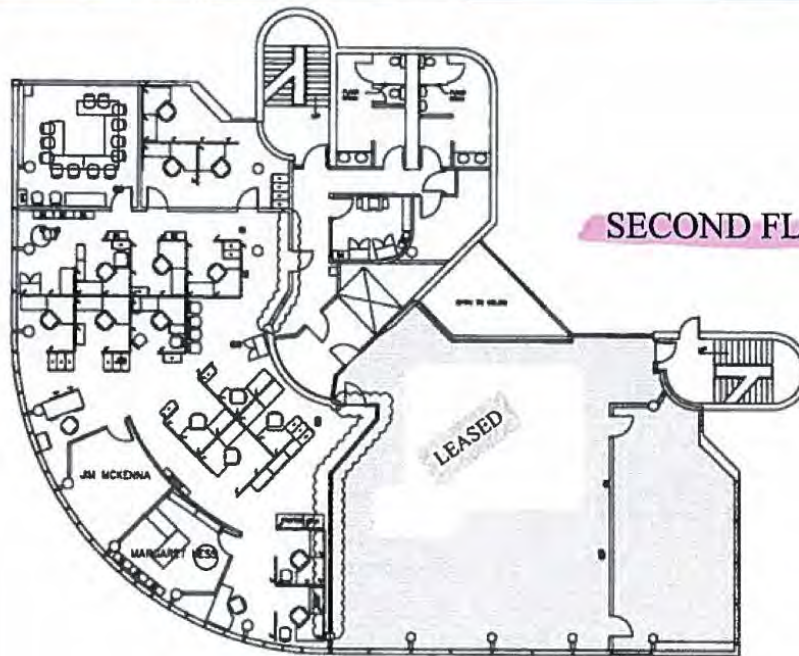
- \$17.00/SF, full service excluding janitorial.



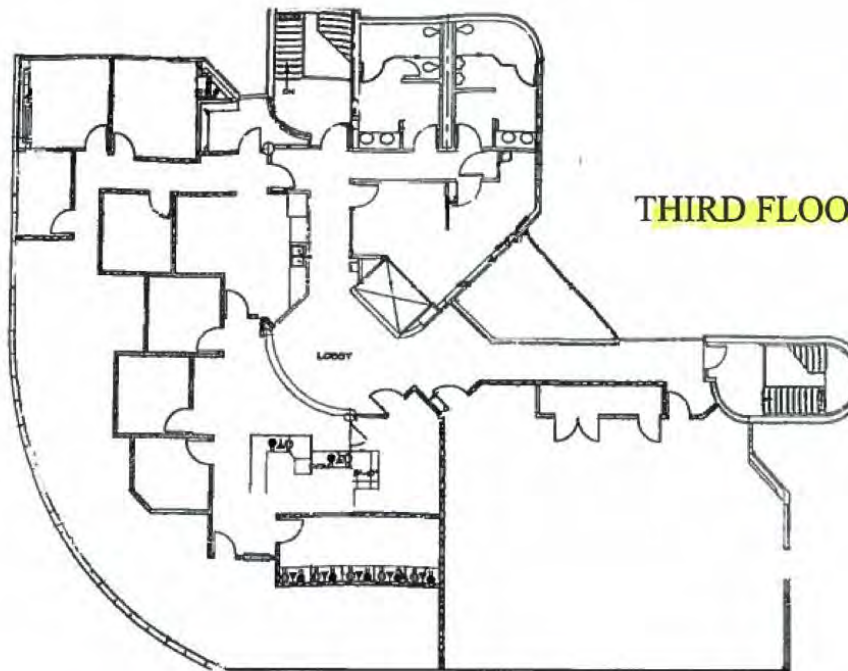
**BRADLEY
SCOTT**
INCORPORATED
COMMERCIAL REAL ESTATE

All figures herein are presented as estimates. The information contained herein has been obtained from sources believed to be reliable, however, its accuracy is not guaranteed. Any prospective tenant is encouraged to independently verify this information.

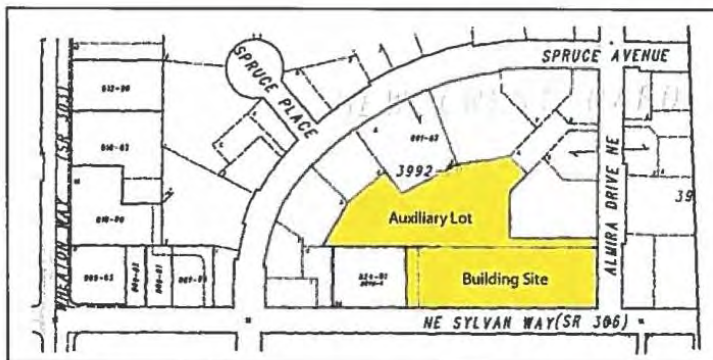




SECOND FLOOR PLAN

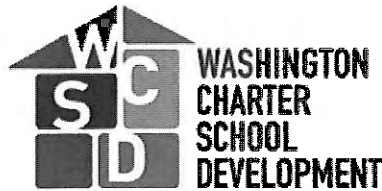


THIRD FLOOR PLAN



For further information, please call:

Chris J. Wray
Managing Broker
(360) 479-6900 -or- (800) 479-6903
E-mail: chris@bradleyscottinc.com



February 6, 2019

Ms. Cindi Williams, Chair
& Members of the Commission
Washington State Charter School Commission
P.O. Box 40996
Olympia, WA 98504-0996

Dear Chair Williams and Members of the Commission:

On behalf of Washington Charter School Development ("WCSD"), I am writing to express my strong support for Catalyst Public Schools and their efforts to establish a K-8 school in Bremerton. Led by the team of Amanda Gardner and Tatiana Epanchin, Catalyst is focused on serving this community and closing the student achievement gap. Both Amanda and Tatiana bring a wealth of experience associated with developing new school curriculum and establishing and operating charter schools in previously underserved communities. This experience means that I have the utmost confidence in her ability to launch and sustain a high-quality public charter school in Kitsip County.

As the Vice President of WCSD, I am delighted to be working with Catalyst Public Schools in establishing this new elementary and middle school. Over the last four years WCSD has invested in and successfully delivered multiple school campuses in Washington and across the country. We are excited about adding Catalyst to the portfolio of WCSD partner schools.

We fully support the school's leadership and are eager to work with the school and its families. We urge you to approve Catalyst Public School's application and we look forward to developing a facility for the school. Thank you for your consideration.

Sincerely,

James Heugas
Vice President

Washington Charter School Development, Inc.



February 12, 2019

VIA ELECTRONIC MAIL

To Whom It May Concern:

On behalf of the Raza Development Fund, Inc. (“RDF”), a high performing non-profit Community Development Financial Institution (“CDFI”) that supports organizations working to demonstrably outperform traditional public school alternatives and close the achievement gap in low-income communities of color across the country, we are pleased to provide this letter of support for Catalyst Public Schools, an aspiring elementary and middle school program (K-8) that intends to open its first school in Kitsap County in Washington State, for the 2020/2021 school year.

RDF is a proud member of an educational thought leadership and community action coalition of stakeholders working together to specifically improve educational outcomes in Washington State. Our coalition partners include the National Alliance of Charter School Authorizers, Center for Education Reform, National Alliance for Public Charter Schools, Washington State Charter School Association, Bill & Melinda Gates Foundation, Walton Family Foundation, and the U.S. Department of Education.

Established in 1999, RDF was one of the first impact investors in the country to specialize in supporting start-up charter schools; and our investment portfolio includes some of the best known and most effective innovative charter school models in the country. The fund has been an active supporter of the charter school movement in Washington, having provided direct funding to some of the state’s first, high-quality charter schools including Excel Public Charter School, Summit Public School Atlas, Green Dot Public Schools Rainier Leadership Academy Middle School, and Impact Public Schools Puget Sound Elementary.

While there is no current public charter school facility funding solution in place, at this time, RDF is committed to funding quality school choice options like Catalyst Public Schools throughout Washington State. Should you or any other parties involved with Amanda Gardner, Tatiana Epanchin or the charter school movement in Washington State, have questions about how we can work together to develop a healthy, a charter school infrastructure and ecosystem, please feel free to contact me at (602) 910-0159 or via email at asanchez@razafund.org.

Sincerely,

Amanda Sanchez

Amanda Sanchez
Director | Pacific Northwest Region

Section 24: Attachment 24: Facilities Statement of Assurances

In the case that Catalyst: Bremerton will lease a religious facility, we will adhere to the following guidance of the Washington State Charter School Commission.

The United States Constitution and the Washington State Constitution both place constraints on the interactions between public entities, such as charter schools, and religious or sectarian organizations. In the context of lease or rental of charter school facilities from a religious or sectarian organization, charter schools need to ensure that they avoid even an appearance that the school is affiliated with or influenced or controlled by a religious or sectarian organization. There are many factors that could lead to such an appearance, and it is impossible to anticipate and address all of those factors in a FAQ. However, there are a number of steps that a charter school can take in an effort to minimize the appearance of support, affiliation, or control:

- Any lease or rental agreement should be the result of an arm's length negotiation, with the amount paid under the agreement being as close to fair market value as possible. Payment significantly above or below fair market value it can create the appearance of support, affiliation, or control.
- The physical space being leased or rented by the school should be under the sole control of the charter school, for the school's exclusive use.
- There should be no religious symbols, pamphlets, icons, messages, books or other paraphernalia on display at the entrance to the charter school, in entries or hallways leading to the leased or rented space, or inside the leased or rented space itself.
- There should be complete separation between the charter school administration and the sectarian organization and contact between the two should be limited to interaction as a landlord tenant or, ideally, through a property management organization.
- The religious or sectarian organization should have no control over the charter school and its operations.
- Students should have no contact with representatives or members of the religious or sectarian organization, or religious or sectarian activities.
- The building should not have the external appearance of a religious or sectarian organization, it should not have signs or religious symbols on the outside of the building and, ideally, would not be on property that is adjacent to, or near, buildings that are occupied by the religious or sectarian organization.
- Extracurricular activities cannot involve religious affiliation or interaction with a religious or sectarian organization.
- The charter school board should not be affiliated with the religious or sectarian organization from whom they are leasing property and no church or sectarian leader should serve in any capacity with the charter school.
- The lease or rental agreement must be non-sectarian in all provisions and should avoid provisions that give even an appearance of religious or sectarian influence.
- The lease or rental agreement must clearly vest control and decisions relating to the charter school with the charter school board.

The charter school should develop policies that contain safeguards that ensure that each of these steps are adhered to and ensure that there is not an appearance of endorsement or support of the sectarian organization¹.

¹ Washington State Charter School Commission. Feb 2015.



Catalyst: Bremerton

Section 25: Attachment 25



Contents:

- Start-up Plan
- Catalyst Year-at-a-Glance

Category	Task Name	Start	Finish	Assigned To	Done	2018			
						Q1	Q2	Q3	Q4
Budget	Develop initial 5 year school budget	06/01/18	06/14/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div> Amanda G	
Communications	Hire someone to create a logo.	07/01/18	07/09/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div> Amanda	
Communications	Agree on a logo.	07/01/18	07/09/18	Both	<input checked="" type="checkbox"/>			<div><div></div></div> Both	
Facilities	Determine space usage needs	07/01/18	07/09/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div> Amanda	
Research	Update work plan	07/01/18	08/09/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div> Amand	
Communications	Draft email blast template	07/15/18	08/10/18	Both	<input checked="" type="checkbox"/>			<div><div></div></div> Both	
Communications	Set up Mailchimp for email blasts.	07/20/18	07/20/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div> Amanda	
Communications	Buy a domain name for your website.	07/30/18	08/03/18	Tatiana Epanchin	<input checked="" type="checkbox"/>			<div><div></div></div> Tatiana	
Communications	Set up email addresses under school name.	07/30/18	08/03/18	Tatiana Epanchin	<input checked="" type="checkbox"/>			<div><div></div></div> Tatiana	
Communications	Buy business cards.	07/30/18	08/03/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div> Amand	
Community Building	Email Blast--August	08/01/18	08/01/18	Both	<input checked="" type="checkbox"/>			<div><div></div></div> Both	
Community Building	Blast press release on personal FB pages	08/01/18	08/21/18	Both	<input checked="" type="checkbox"/>			<div><div></div></div> Both	
Community Building	Schedule: John Powers	08/01/18	09/28/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div> Amā	
Community Building	Schedule: Wes Larson	08/01/18	09/28/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div> Amā	
Community Building	Schedule: Damon Bell	08/01/18	09/28/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div> Amā	
Community Building	Schedule: Cheryl Nunez	08/01/18	09/28/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div> Amā	
Community Building	Outreach: Homeschooling families in Bremerton	08/01/18	09/28/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div> Amā	
Community Building	Schedule: Alyson Rotter follow up meeting	08/01/18	09/28/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div> Amā	
Community Building	Research: All pre--schools and Head Starts (create contact list)	08/01/18	09/28/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div> Amā	
Community Building	Learning: Area around Armin Jahr/MVMS	08/01/18	09/28/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div> Amā	
Community Building	Reach out to Jim Spady	08/01/18	09/28/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div> Amā	
Community Building	Schedule: Steve A.	08/01/18	09/28/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div> Amā	
Community Building	Outreach to union leadership and uniserve office	08/01/18	09/28/18	Amanda Gardner	<input type="checkbox"/>			<div><div></div></div> Amā	
Community Building	Outreach to Christina Rolfes	08/01/18	09/28/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div> Amā	
Community Building	Community Outreach List and Calendar	08/01/18	09/28/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div> Amā	
Community Building	Learning: Bremerton neighborhood associations	08/01/18	09/11/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div> Amar	
Fundraising	Review NSVF website biweekly to determine process and timeline for Invent grant--update workplan as needed.	08/01/18	08/09/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div> Amand	
Community Building	Draft Community Engagement Plan	08/01/18	09/11/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div> Amar	
Fundraising	Draft application for NSVF Invent grant and secure feedback	08/01/18	09/11/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div> Amar	
Research	Research: Best database solution for first phase of school development	08/01/18	09/11/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div> Amar	
Research	Research: Back office providers (get from Jen)	08/01/18	09/11/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div> Amar	
Research	Research: Food service venders and comparables--see WA Charters Site	08/01/18	09/11/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div> Amar	
Research	Schedule local school visits	08/01/18	09/11/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div> Amar	
Research	Create list of schools to visit nationally	08/01/18	09/11/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div> Amar	
Research	Schedule national school visits.	08/01/18	09/11/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div> Amar	
Research	Review academic research related to your model (specifically Learning Sciences	08/01/18	09/11/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div> Amar	
Research	Determine timeline for community forum and approval process	08/01/18	09/11/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div> Amar	
Research	Determine major deadlines for CSP grant, NSVF, and other funding deadlines	08/01/18	09/11/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div> Amar	
WA Charters	Orientation Call with Maggie	08/01/18	08/01/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div> Amānd	
WA Charters	Orientation Call with Holly	08/01/18	08/01/18	Both	<input checked="" type="checkbox"/>			<div><div></div></div> Both	
WA Charters	Kick Off	08/01/18	08/01/18	Both	<input checked="" type="checkbox"/>			<div><div></div></div> Both	
Community Building	Schedule 1st community event kick off	08/07/18	08/07/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div> Amānd	
Community Building	Plan kick off	08/07/18	08/15/18	Both	<input checked="" type="checkbox"/>			<div><div></div></div> Both	
Community Building	Call Spokane lawyer about 501c3	08/09/18	08/17/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div> Amānc	
Board	Create grid of potential board members, including map of LK members and non--profits in Kitsap, and develop outreach plan.	08/12/18	08/20/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div> Amānc	
Board	Create board member recruitment stragy and plan.	08/12/18	08/20/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div> Amānc	
Board	Document board member recruitment recruitment and selection processes and begin following processes, including creation of matrix of board member key skills	08/12/18	08/20/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div> Amānc	
Communications	Develop comms strategy	08/12/18	09/07/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div> Amar	
Communications	Develop key language for: Initial basic website Overview handout Monthly email blast template	08/12/18	09/07/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div> Amar	
Communications	"Develop 1 pager with mission/slogan, about us, our team, contact info	08/12/18	09/07/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div> Amar	
Communications	Set up social media accounts and post updates 1--2 times a week	08/12/18	08/28/20	Both	<input checked="" type="checkbox"/>			<div><div></div></div>	
Board	Hold board cultivation meetings with potential board members	08/13/18	08/31/20	Both	<input checked="" type="checkbox"/>			<div><div></div></div>	

Category	Task Name	Start	Finish	Assigned To	Done	2018			
						Q1	Q2	Q3	Q4
FinOps	File for 501c3 and tax exempt status	08/14/18	08/31/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div>	Aman
FinOps	Begin incorporation process. In order to offer tax-exemption to funders, and to submit your petition, you will need to incorporate. Learn more about the process here: http://www.calcharters.org/2010/05/incorporating-your-charter-school.html Also keep in mind that CCSA offers incorporation services at pro bono and reduced rates to qualifying members. Learn more here: http://www.calcharters.org/services/financial-legal/incorporation-services.html	08/14/18	08/31/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div>	Aman
FinOps	File Articles of Incorporation (Secretary of State)	08/14/18	08/31/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div>	Aman
FinOps	Create by-laws (kept on record, not filed with state)	08/14/18	08/31/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div>	Aman
FinOps	File for federal, state, AND local (if applicable) tax-exempt status with IRS This is the second stage of the incorporation process. For more information, review Steps 4-6 in Incorporating Your Charter School: http://www.calcharters.org/2010/05/incorporating-your-charter-school.html	08/14/18	08/31/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div>	Aman
WA Charters	Section 3 – Curriculum and Instructional Design	08/14/18	08/31/18	Both	<input checked="" type="checkbox"/>			<div><div></div></div>	Both
WA Charters	Section 9 – Special Populations and At-Risk Students	08/14/18	08/31/18	Both	<input checked="" type="checkbox"/>			<div><div></div></div>	Both
Budget	Forecast "gap" between state funding and cost per student over 3 years and develop plan to close gap; link to fundraising strategy	08/15/18	09/25/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div>	Ama
Communications	Set up simple placeholder website	08/15/18	09/03/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div>	Aman
Communications	Create Facebook account	08/15/18	09/04/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div>	Aman
Fundraising	Create Catalyst slide deck for funders	08/15/18	01/01/19	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div>	
Community Building	Email Mimi Jenson	08/22/18	08/30/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div>	Aman
Charter Application	Draft DEI Plan	09/01/18	01/21/19	Tatiana Epanchin	<input checked="" type="checkbox"/>			<div><div></div></div>	
Communications	Set up and begin sending SMS updates	09/01/18	08/31/20	Both	<input type="checkbox"/>			<div><div></div></div>	
Research	Attend Commission application workshops	09/01/18	10/11/18	Both	<input checked="" type="checkbox"/>			<div><div></div></div>	Bot
Board	Draft and finalize board bylaws	09/02/18	09/19/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div>	Ama
WA Charters	NSVF Invent grant webinar (registration required)	09/03/18	09/20/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div>	Ama
Community Building	Set schedule for community meetings and convening groups	09/06/18	09/14/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div>	Ama
Community Building	Marketing plan and materials for convening groups	09/11/18	09/28/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div>	Ama
Community Building	Develop curriculum/agenda for community meetings	09/11/18	09/28/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div>	Ama
NSVF	Finalizing application for NSVF Invent grant and secure feedback	09/11/18	10/22/18	Both	<input checked="" type="checkbox"/>			<div><div></div></div>	Bo
WA Charters	Draft at least 3-4 FACE core beliefs and then meet with 5 new parents to get feedback. Make notes of the interactions, what they learned about the parents (their K-12 experience, goals, etc).	09/11/18	09/28/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div>	Ama
Community Building	Develop Local Community Meeting Calendar (starting September 15th, dates, location, incentives for attendance, language support, childcare, etc.) and outreach plan	09/14/18	09/27/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div>	Ama
WA Charters	Section 4 – Student Performance Standards	09/18/18	10/05/18	Both	<input checked="" type="checkbox"/>			<div><div></div></div>	Bot
WA Charters	Section 5 – High School Graduation Requirements	09/18/18	10/05/18	Both	<input checked="" type="checkbox"/>			<div><div></div></div>	Bot
WA Charters	Section 6 – School Calendar and Schedule	09/18/18	10/05/18	Both	<input checked="" type="checkbox"/>			<div><div></div></div>	Bot
WA Charters	Section 8 – Supplemental Programming	09/18/18	10/05/18	Both	<input checked="" type="checkbox"/>			<div><div></div></div>	Bot
WA Charters	Section 15 Organizational Structure and Partnerships	09/18/18	10/05/18	Both	<input checked="" type="checkbox"/>			<div><div></div></div>	Bot
WA Charters	Section 23 – Performance Framework	09/18/18	10/05/18	Both	<input checked="" type="checkbox"/>			<div><div></div></div>	Bot
Community Building	Email Blast--September	09/19/18	09/19/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div>	Ama
WA Charters	Budget Draft 1	09/25/18	10/12/18	Both	<input checked="" type="checkbox"/>			<div><div></div></div>	Bot
Community Building	Draft 3 core principles around family and community engagement --by the end of September (brand new parents) to solicit feedback on the tenets.	09/28/18	11/08/18	Both	<input checked="" type="checkbox"/>			<div><div></div></div>	B
Community Building	Consistently hold school information sessions and parent leadership groups 2-4 times per month.	10/01/18	08/28/20	Both	<input checked="" type="checkbox"/>			<div><div></div></div>	
Community Building	Email Blast--October	10/17/18	10/17/18	Both	<input checked="" type="checkbox"/>			<div><div></div></div>	Bo
WA Charters	Section 7 – School Culture	10/19/18	11/07/18	Both	<input checked="" type="checkbox"/>			<div><div></div></div>	Bi
WA Charters	Section 11 – Student Discipline Policy and Plan	10/19/18	11/07/18	Both	<input checked="" type="checkbox"/>			<div><div></div></div>	Bi
WA Charters	Section 21 – Staffing Plans, Hiring, Management, and Evaluation	10/19/18	11/07/18	Both	<input checked="" type="checkbox"/>			<div><div></div></div>	Bi
WA Charters	Section 22 – Professional Development	10/19/18	11/07/18	Both	<input checked="" type="checkbox"/>			<div><div></div></div>	Bi
Fundraising	Develop initial fundraising strategy, including case for support, slide deck, and business plan	10/23/18	01/14/19	amy.kiyota@gmail.c	<input checked="" type="checkbox"/>			<div><div></div></div>	
Fundraising	Develop case for support for fundraising and community events	10/23/18	01/14/19	amy.kiyota@gmail.c	<input checked="" type="checkbox"/>			<div><div></div></div>	
FinOps	Create budget development process and timeline	10/30/18	11/30/18	Both	<input checked="" type="checkbox"/>			<div><div></div></div>	
FinOps	Year 0 budget created and approved	10/30/18	11/30/18	Both	<input checked="" type="checkbox"/>			<div><div></div></div>	
FinOps	Year 1 budget created and approved	10/30/18	11/30/18	Both	<input checked="" type="checkbox"/>			<div><div></div></div>	
FinOps	Invoice approval process created	10/30/18	11/30/18	Amanda Gardner	<input checked="" type="checkbox"/>			<div><div></div></div>	

Category	Task Name	Start	Finish	Assigned To	Done	2018			
						Q1	Q2	Q3	Q4
FinOps	Calendar annual reporting to authorizer and state	10/30/18	11/30/18	Amanda Gardner	<input checked="" type="checkbox"/>				<input type="checkbox"/>
FinOps	Determine financial policies and processes related to financial management, monitoring, reporting, and audit	10/30/18	11/30/18	Amanda Gardner	<input checked="" type="checkbox"/>				<input type="checkbox"/>
Board	Establish board meeting schedule	11/01/18	11/20/18	Both	<input checked="" type="checkbox"/>				<input type="checkbox"/> E
Board	Schedule annual Board retreat	11/01/18	11/20/18	Both	<input checked="" type="checkbox"/>				<input type="checkbox"/> E
Board	Plan for annual Board retreat	11/01/18	11/20/18	Both	<input checked="" type="checkbox"/>				<input type="checkbox"/> E
Board	Find space for annual Board retreat	11/01/18	11/20/18	Both	<input checked="" type="checkbox"/>				<input type="checkbox"/> E
Charter Application	Create power map of the community and use to determine stakeholder engagement plan	11/01/18	12/12/18	Both	<input checked="" type="checkbox"/>				<input type="checkbox"/>
Charter Application	Power map charter school commissioners to inform approval strategy	11/01/18	12/12/18	Both	<input checked="" type="checkbox"/>				<input type="checkbox"/>
Charter Application	Make a list of the people that have influence over the decision-makers.	11/01/18	12/12/18	Both	<input checked="" type="checkbox"/>				<input type="checkbox"/>
Charter Application	Create master list of letters of support	11/01/18	12/12/18	Both	<input checked="" type="checkbox"/>				<input type="checkbox"/>
Communications	Media strategy and support (press releases, media outreach, op-eds)	11/01/18	02/01/19	Amanda Gardner	<input checked="" type="checkbox"/>				<input type="checkbox"/>
Communications	Develop media/reporter list with contact information	11/01/18	02/01/19	Amanda Gardner	<input checked="" type="checkbox"/>				<input type="checkbox"/>
Communications	Look into website optimization and Facebook/social media ads and Google Ad Words	11/01/18	02/01/19	Amanda Gardner	<input checked="" type="checkbox"/>				<input type="checkbox"/>
Community Building	Revise the following list of community members to meet with	11/01/18	12/12/18	Amanda Gardner	<input checked="" type="checkbox"/>				<input type="checkbox"/>
Community Building	Meet with local library director	11/01/18	12/12/18	Both	<input checked="" type="checkbox"/>				<input type="checkbox"/>
Community Building	Meet with local community center director	11/01/18	12/12/18	Both	<input checked="" type="checkbox"/>				<input type="checkbox"/>
Community Building	Meet with Black educators organization	11/01/18	12/12/18	Both	<input checked="" type="checkbox"/>				<input type="checkbox"/>
Community Building	Meet with local museum directors	11/01/18	12/12/18	Both	<input checked="" type="checkbox"/>				<input type="checkbox"/>
Community Building	Meet with the mayor	11/01/18	12/12/18	Both	<input checked="" type="checkbox"/>				<input type="checkbox"/>
Community Building	Meet with representatives from local colleges and universities	11/01/18	12/12/18	Both	<input checked="" type="checkbox"/>				<input type="checkbox"/>
Community Building	Meet with entrepreneur organizations	11/01/18	12/12/18	Both	<input checked="" type="checkbox"/>				<input type="checkbox"/>
Community Building	Meet with leaders of local religious institutions (churches, synagogues, mosques, etc.)	11/01/18	12/12/18	Both	<input checked="" type="checkbox"/>				<input type="checkbox"/>
Community Building	Meet with local TFA director.	11/01/18	12/12/18	Both	<input checked="" type="checkbox"/>				<input type="checkbox"/>
FinOps	Develop a fundraising plan to cover pre-approval expenses, because start-up capital comes late in the process of starting a school, to cover the shortfall between program expenses and revenues, and to make up for deferrals in state funding (which can cause cash flow gaps). The most successful fundraisers start early and develop a clear plan. Learn more here: http://www.calcharters.org/2010/05/fundraising-101.html	11/01/18	01/01/19	Both	<input checked="" type="checkbox"/>				<input type="checkbox"/>
Fundraising	Determine board roles/responsibilities with respect to fundraising	11/01/18	01/01/19	Amanda Gardner	<input checked="" type="checkbox"/>				<input type="checkbox"/>
Fundraising	Determine staffing necessary for fundraising	11/01/18	01/01/19	Amanda Gardner	<input checked="" type="checkbox"/>				<input type="checkbox"/>
Fundraising	Engage foundations to cultivate potential funders	11/01/18	01/01/19	Both	<input checked="" type="checkbox"/>				<input type="checkbox"/>
WA Charters	Section 13 – Educational Program Capacity	11/09/18	11/28/18	Both	<input checked="" type="checkbox"/>				<input type="checkbox"/>
WA Charters	Section 14 – Legal Status and Governing Documents	11/09/18	11/28/18	Both	<input checked="" type="checkbox"/>				<input type="checkbox"/>
WA Charters	Section 16 – Governing Board	11/09/18	11/28/18	Both	<input checked="" type="checkbox"/>				<input type="checkbox"/>
WA Charters	Section 17 – Advisory Bodies	11/09/18	11/28/18	Both	<input checked="" type="checkbox"/>				<input type="checkbox"/>
Board	Establish board playbook of policies and procedures; board onboarding guide (decision making, R + R, open meeting law, succession plan, bylaws, job descriptions, etc)	11/11/18	12/18/18	Both	<input checked="" type="checkbox"/>				<input type="checkbox"/>
Board	Hold first meeting to "activate" board--advisory meeting prior to approval	11/11/18	02/01/19	Both	<input checked="" type="checkbox"/>				<input type="checkbox"/>
WA Charters	Budget 2	11/13/18	11/30/18	Amanda Gardner	<input checked="" type="checkbox"/>				<input type="checkbox"/>
Community Building	Email Blast--November	11/14/18	11/14/18	Both	<input checked="" type="checkbox"/>				<input type="checkbox"/> E
Communications	Design and buy outreach stuff – need for canvassing/marketing/events (banners, tablecloths, buttons, etc.)	11/19/18	12/28/18	Amanda Gardner	<input checked="" type="checkbox"/>				<input type="checkbox"/>
Communications	"Buy Mobilization stuff (t-shirts, stickers)	11/19/18	12/28/18	Amanda Gardner	<input checked="" type="checkbox"/>				<input type="checkbox"/>
FinOps	Execute fundraising plan.	11/20/18	08/30/19	Both	<input checked="" type="checkbox"/>				<input type="checkbox"/>
Communications	Create a website.	11/21/18	01/01/19	Both	<input checked="" type="checkbox"/>				<input type="checkbox"/>
Facilities	Contact possible facilities professionals and discuss joining your facilities project team.	11/30/18	02/01/19	Both	<input checked="" type="checkbox"/>				<input type="checkbox"/>
Facilities	Begin researching district facilities options	11/30/18	12/19/18	Both	<input checked="" type="checkbox"/>				<input type="checkbox"/>
Facilities	Begin working with real estate professionals	11/30/18	12/19/18	Both	<input checked="" type="checkbox"/>				<input type="checkbox"/>
Facilities	Review parcel map for Kitsap Co to ID potential facilities	11/30/18	12/19/18	Amanda Gardner	<input checked="" type="checkbox"/>				<input type="checkbox"/>
Budget	Establish school bank account.	12/01/18	02/01/19	Amanda Gardner	<input checked="" type="checkbox"/>				<input type="checkbox"/>
WA Charters	Section 10 – Student Recruitment and Enrollment	12/11/18	12/28/18	Both	<input checked="" type="checkbox"/>				<input type="checkbox"/>
WA Charters	Section 12 – Family and Community Involvement	12/11/18	12/28/18	Both	<input checked="" type="checkbox"/>				<input type="checkbox"/>
WA Charters	Section 18 – Grievance Policy	12/11/18	12/28/18	Both	<input checked="" type="checkbox"/>				<input type="checkbox"/>

Category	Task Name	Start	Finish	Assigned To	Done	2018				
						Q1	Q2	Q3	Q4	
WA Charters	Section 27 – Financial Plan	12/11/18	12/28/18	Both	<input checked="" type="checkbox"/>					
WA Charters	Section 19 – District Partnerships	12/11/18	12/28/18	Both	<input checked="" type="checkbox"/>					
WA Charters	Section 20 – Education Service Providers (ESPs and Other Partnerships)	12/11/18	12/28/18	Both	<input checked="" type="checkbox"/>					
WA Charters	Section 29 – Existing Operators	12/11/18	12/28/18	Both	<input checked="" type="checkbox"/>					
WA Charters	Section 30 – Optional Federal Charter School Program Planning and Implementation Grant	12/11/18	12/28/18	Both	<input checked="" type="checkbox"/>					
WA Charters	Section 10 – Student Recruitment and Enrollment	12/11/18	12/28/18	Both	<input checked="" type="checkbox"/>					
WA Charters	Section 12 – Family and Community Involvement	12/11/18	12/28/18	Both	<input checked="" type="checkbox"/>					
WA Charters	Section 18 – Grievance Policy	12/11/18	12/28/18	Both	<input checked="" type="checkbox"/>					
WA Charters	Section 27 – Financial Plan	12/11/18	12/28/18	Both	<input checked="" type="checkbox"/>					
WA Charters	Section 19 – District Partnerships	12/11/18	12/28/18	Both	<input checked="" type="checkbox"/>					
WA Charters	Section 20 – Education Service Providers (ESPs and Other Partnerships)	12/11/18	12/28/18	Both	<input checked="" type="checkbox"/>					
WA Charters	Section 29 – Existing Operators	12/11/18	12/28/18	Both	<input checked="" type="checkbox"/>					
WA Charters	Section 30 – Optional Federal Charter School Program Planning and Implementation Grant	12/11/18	12/28/18	Both	<input checked="" type="checkbox"/>					
Community Building	Email Blast--December	12/12/18	12/12/18	Both	<input checked="" type="checkbox"/>					
Board	Review conflict of interest policies & create plan for Annual Disclosure Statement	01/01/19	03/26/19	Both	<input checked="" type="checkbox"/>					
Board	Prepare/review Board Confidentiality Policy	01/01/19	03/26/19	Both	<input checked="" type="checkbox"/>					
Board	Develop ongoing board orientation and training program including PD plan for board	01/01/19	02/11/19	Amanda Gardner	<input checked="" type="checkbox"/>					
Charter Application	Send out requests for letters of support with deadline for return. Request letters from stakeholders, community leaders, and partners that can provide legitimacy and may resonate with the board members who will vote to approve or deny your petition.	01/01/19	01/09/19	Both	<input checked="" type="checkbox"/>					
Charter Application	Confirm those asked will write letters	01/01/19	01/09/19	Both	<input checked="" type="checkbox"/>					
Charter Application	Receive final letters of support and put into appendix of petition and ToC	01/01/19	02/11/19	Both	<input checked="" type="checkbox"/>					
Charter Application	Follow up with any outstanding letters of support	01/01/19	02/11/19	Both	<input checked="" type="checkbox"/>					
Charter Application	Confirm with anyone listed as an advisor in petition that they are comfortable being listed as such	01/01/19	02/11/19	Both	<input checked="" type="checkbox"/>					
Charter Application	Confirm list of advisors in petition	01/01/19	02/11/19	Both	<input checked="" type="checkbox"/>					
Community Building	Create canvassing plan.	01/01/19	01/18/19	Both	<input checked="" type="checkbox"/>					
Community Building	Finalize flyer content and set timing for translation and printing	01/01/19	01/18/19	Both	<input checked="" type="checkbox"/>					
Community Building	Get flyer translated	01/01/19	01/18/19	Both	<input checked="" type="checkbox"/>					
WA Charters	Section 24 – Facilities	01/02/19	01/21/19	Both	<input checked="" type="checkbox"/>					
WA Charters	Section 25 – Start-Up and Ongoing Operations	01/02/19	01/21/19	Both	<input checked="" type="checkbox"/>					
WA Charters	Section 26 – Operations Capacity	01/02/19	01/21/19	Both	<input checked="" type="checkbox"/>					
WA Charters	Section 28 – Financial Management Capacity	01/02/19	01/21/19	Both	<input checked="" type="checkbox"/>					
WA Charters	Complete draft charter application (all sections, attachments and citations complete)	01/15/19	02/01/19	Both	<input checked="" type="checkbox"/>					
Community Building	Email Blast--January 2019	01/16/19	01/16/19	Both	<input checked="" type="checkbox"/>					
WA Charters	Incorporate all external review feedback and finalize text of draft charter application	01/29/19	02/15/19	Both	<input checked="" type="checkbox"/>					
Community Building	Email Blast--February 2019	02/13/19	02/13/19	Both	<input checked="" type="checkbox"/>					
Community Building	Email Blast--March 2019	03/13/19	03/13/19	Both	<input type="checkbox"/>					
Pilot	Create vision for pilot program (summer 2019)	03/15/19	04/25/19	Tatiana Epanchin	<input type="checkbox"/>					
Pilot	Review resumes and conduct interviews for pilot program	03/15/19	04/25/19	Tatiana Epanchin	<input type="checkbox"/>					
Pilot	Hire staff for pilot program	03/15/19	04/25/19	Tatiana Epanchin	<input type="checkbox"/>					
Pilot	Train staff for pilot program	03/15/19	04/25/19	Tatiana Epanchin	<input type="checkbox"/>					
Pilot	Secure space for pilot program	03/15/19	04/25/19	Tatiana Epanchin	<input type="checkbox"/>					
Pilot	Secure students for pilot program	03/15/19	04/25/19	Tatiana Epanchin	<input type="checkbox"/>					
Pilot	Communicate with parents of students for pilot program	03/15/19	04/25/19	Tatiana Epanchin	<input type="checkbox"/>					
Pilot	Create calendar for pilot program	03/15/19	04/25/19	Tatiana Epanchin	<input type="checkbox"/>					
Hiring	Develop clear processes for identifying key competencies and qualifications for founding staff and develop structures and systems for effective staff recruitment, selection, and onboarding.	03/29/19	05/09/19	Both	<input checked="" type="checkbox"/>					
Board	Complete Open Meeting Law training	04/01/19	06/24/19	Both	<input type="checkbox"/>					
Community Building	Email Blast--April 2019	04/17/19	04/17/19	Both	<input type="checkbox"/>					
Facilities	Start the process of negotiating with landlords as soon as petition is approved.	05/01/19	06/11/19	Both	<input type="checkbox"/>					
Facilities	Evaluate financial feasibility of various options	05/01/19	06/11/19	Both	<input type="checkbox"/>					
Facilities	Investigate legal requirements (Terms of lease, local codes, etc.)	05/01/19	06/11/19	Both	<input type="checkbox"/>					

Category	Task Name	Start	Finish	Assigned To	Done	2018			
						Q1	Q2	Q3	Q4
Facilities	Create timeline for lease offer	05/01/19	06/11/19	Both	<input type="checkbox"/>				
Facilities	Create Facilities Plan A	05/01/19	06/11/19	Both	<input type="checkbox"/>				
Facilities	Create Facilities Plan B	05/01/19	06/11/19	Both	<input type="checkbox"/>				
Facilities	Negotiate a lease a year before your school opens or a letter of intent so you can apply for a conditional use permit. Get the letter of intent by August or September.	05/01/19	06/11/19	Both	<input type="checkbox"/>				
Facilities	Go to city planning to get a conditional use permit to have a school in that zone/area. Do this 10 months before your school opens, or October.	05/01/19	06/11/19	Both	<input type="checkbox"/>				
Facilities	Apply for a certificate of occupancy from the building department.	05/01/19	06/11/19	Both	<input type="checkbox"/>				
Facilities	Update these Ready Facility for Occupancy steps to reflect your specific site	05/01/19	06/11/19	Both	<input type="checkbox"/>				
Facilities	<i>Consider working with an architect that is savvy about charter school issues. Mallory Dwinal recommends Linda Stevenin (lstevenin@artika3.com)</i>	05/01/19	06/11/19	Both	<input type="checkbox"/>				
Facilities	Submit conditional use permit to the planning division. (Supposed to take 90 days, but takes longer than that.	05/01/19	06/11/19	Both	<input type="checkbox"/>				
Facilities	Building division inspects if the building is up to code. You can convince them to do this in parallel with conditional use permit.	05/01/19	06/11/19	Both	<input type="checkbox"/>				
Facilities	Receive list of tenant improvements.	05/01/19	06/11/19	Both	<input type="checkbox"/>				
Facilities	Finalize list of facility improvements, categorized into Essential, High Priority & Low Priority	05/01/19	06/11/19	Both	<input type="checkbox"/>				
Facilities	Plan volunteer day to address facility needs and build investment, if desired.	05/01/19	06/11/19	Both	<input type="checkbox"/>				
Facilities	Bid for a contractor to do the improvements. (Prepare for this to be tedious and expensive.)	05/01/19	06/11/19	Both	<input type="checkbox"/>				
Facilities	Create clear renovation plan (if applicable)	05/01/19	06/11/19	Both	<input type="checkbox"/>				
Facilities	Ensure plans reviewed/approved by appropriate authority/agency	05/01/19	06/11/19	Both	<input type="checkbox"/>				
Facilities	Engage contractor	05/01/19	06/11/19	Both	<input type="checkbox"/>				
Facilities	Develop construction schedule that is aligned with start of school	05/01/19	06/11/19	Both	<input type="checkbox"/>				
Facilities	Hire Project Manager	05/01/19	06/11/19	Both	<input type="checkbox"/>				
Facilities	Ensure that your facility meets zoning requirements, local regulations, and occupancy requirements	05/01/19	06/11/19	Both	<input type="checkbox"/>				
Facilities	Ensure learning environment is clear, attractive, functional, and comfortable	05/01/19	06/11/19	Both	<input type="checkbox"/>				
Facilities	Ensure adequate safety procedure/crisis plan is in place	05/01/19	06/11/19	Both	<input type="checkbox"/>				
Facilities	Obtain certificate of occupancy	05/01/19	06/11/19	Both	<input type="checkbox"/>				
Facilities	Facilities full-growth plan created with specific location identified	05/01/19	06/11/19	Both	<input type="checkbox"/>				
Facilities	Determine layout for teachers' offices	05/01/19	06/11/19	Both	<input type="checkbox"/>				
Facilities	Set up teacher offices	05/01/19	06/11/19	Both	<input type="checkbox"/>				
Facilities	Finalize list of facility improvements, categorized into Essential, High Priority & Low Priority	05/01/19	06/11/19	Both	<input type="checkbox"/>				
Facilities	Set up classrooms	05/01/19	06/11/19	Both	<input type="checkbox"/>				
Facilities	Conduct an assessment of the programmatic accessibility of the school to handicapped persons by using the ADA facilities checklist at www.ada.gov/rachek.pdf	05/01/19	06/11/19	Both	<input type="checkbox"/>				
Facilities	Ensure entire facility is wireless.	05/01/19	06/11/19	Both	<input type="checkbox"/>				
Facilities	Determine if we need self-contained rooms for students with severe disabilities	05/01/19	06/11/19	Both	<input type="checkbox"/>				
Community Building	Email Blast--May 2019	05/15/19	05/15/19	Both	<input type="checkbox"/>				
Hiring	Interview founding team	06/01/19	10/03/19	Both	<input type="checkbox"/>				
Hiring	Hire founding team	06/01/19	10/03/19	Both	<input type="checkbox"/>				
Pilot	Run pilot program	06/15/19	09/05/19	Both	<input type="checkbox"/>				
Community Building	Email Blast--June 2019	06/19/19	06/19/19	Both	<input type="checkbox"/>				
Community Building	Email Blast--July 2019	07/17/19	07/17/19	Both	<input type="checkbox"/>				
Community Building	Email Blast--August 2019	08/21/19	08/21/19	Both	<input type="checkbox"/>				
Hiring	Develop a clear description of your needs and circulate it among your network, or more broadly (e.g. education- or nonprofit-oriented job posting sites, alumni networks, or local university/administrative credential programs).	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	Generate job descriptions and evaluation process, esp. for leadership team	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	Finalize staffing needs	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	Finalize employment policies & procedures	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	Finalize the hiring and termination protocol and process	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	Finalize compensation plan (salary structures, benefits package, retirement)	09/15/19	10/24/19	Both	<input type="checkbox"/>				

Category	Task Name	Start	Finish	Assigned To	Done	2018			
						Q1	Q2	Q3	Q4
Hiring	Develop or modify contracts or at-will acknowledgement	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	Identify process for supporting, monitoring and assessing personnel	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	Develop employee handbook	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	Develop background check procedure (include FBI & Child Abuse & Neglect Registry) and other authorizer requirements	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	Write job descriptions	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	Run background checks on all employees	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	Post positions	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	Offer letters created and approved by HR	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	Denial email created and approved by HR	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	New staff engagement plan created	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	Staffing model approved, aligned to budget, and aligned to school schedule	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	Online application created and posted	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	Application review plan created	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	In-person interview process created	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	In-person interview materials created	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	In-person interview dates identified	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	Hiring goals/timeline created with clear benchmarks	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	Recruitment strategy/plan created	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	Staff recruitment advertising plan and materials created	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	Attend recruitment opportunities.	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	Send out announcement on social media.	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	Hiring email templates created	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	Identify or create school specific personnel policies, procedures, and handbook for inclusion in school application	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	Screen applicants, including checking references, and prepare list of potential individuals per position to interview	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	Hold interviews and evaluate	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	Make decisions	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	Hire staff and process through HR	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	Hire 2 qualified teachers by x date.	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	Hire 5 qualified teachers by x date.	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	Hire 10 qualified teachers by x date.	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	Hire office staff.	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	Hire operations staff.	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	Hire leadership team.	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	Hire custodian(s).	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	Process through HR (Live Scan, TB tests, W-2, etc.)	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring		09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	Employee handbook distributed/signed by each staff person	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Hiring	Finalize tentative agreements / understandings with potential external service providers	09/15/19	10/24/19	Both	<input type="checkbox"/>				
Community Building	Email Blast--September 2019	09/18/19	09/18/19	Both	<input type="checkbox"/>				
Community Building	Email Blast--October 2019	10/16/19	10/16/19	Both	<input type="checkbox"/>				
Enrollment	Create application	11/01/19	11/11/19	Both	<input type="checkbox"/>				
Enrollment	Send application to families	11/01/19	12/12/19	Both	<input type="checkbox"/>				
Enrollment	Develop preliminary family / student focused school marketing materials and brochures	11/01/19	12/12/19	Both	<input type="checkbox"/>				
Enrollment	Launch student marketing and recruiting campaign, including application timeframe, process, and deadline.	11/01/19	12/12/19	Both	<input type="checkbox"/>				
Enrollment	Run ads in local newspaper.	11/01/19	12/12/19	Both	<input type="checkbox"/>				
Enrollment	Distribute literature (leaflet) in local businesses and on the street	11/01/19	12/12/19	Both	<input type="checkbox"/>				
Enrollment	Promote school via special events and activities in targeted neighborhoods	11/01/19	12/12/19	Both	<input type="checkbox"/>				
Enrollment	Promote school via any other strategies indicated in school application	11/01/19	12/12/19	Both	<input type="checkbox"/>				
Enrollment	Accept and acknowledge student applications, and invite families to lottery	11/01/19	12/12/19	Both	<input type="checkbox"/>				
Enrollment	Confirm impartial lottery procedure	11/01/19	12/12/19	Both	<input type="checkbox"/>				
Enrollment	Determine where lottery will be held.	11/01/19	12/12/19	Both	<input type="checkbox"/>				
Enrollment	Plan for lottery with team - space, seating, time frame, materials	11/01/19	12/12/19	Both	<input type="checkbox"/>				
Enrollment	Conduct lottery and establish wait list (if applicable)	11/01/19	12/12/19	Both	<input type="checkbox"/>				

Category	Task Name	Start	Finish	Assigned To	Done	2018			
						Q1	Q2	Q3	Q4
Enrollment	Notify parents of admission status and deadline for completing registration	11/01/19	12/12/19	Both	<input type="checkbox"/>				
Enrollment	Establish clear processes for student enrollment and registration.	11/01/19	12/12/19	Both	<input type="checkbox"/>				
Enrollment	Designate a staff person to manage the enrollment process.	11/01/19	12/12/19	Both	<input type="checkbox"/>				
Enrollment	Train a staff person to manage the enrollment process.	11/01/19	12/12/19	Both	<input type="checkbox"/>				
Enrollment	Procure the following forms from another school: emergency contact info, student immunization records request, FRL forms, PR release form, Student/Parent Handbooks, Home Language Survey, acceptable use policies (esp. for student use of technology)	11/01/19	12/12/19	Both	<input type="checkbox"/>				
Enrollment	Update forms to represent school policies and logos	11/01/19	12/12/19	Both	<input type="checkbox"/>				
Enrollment	Send enrollment packet incl. emergency contact info, student immunization records request, FRL forms, PR release form, Student/Parent Handbooks, Home Language Survey, acceptable use policies (esp. for student use of technology)	11/01/19	12/12/19	Both	<input type="checkbox"/>				
Enrollment	Register students in SIS	11/01/19	12/12/19	Both	<input type="checkbox"/>				
Enrollment	Complete introductory phone call to all families	11/01/19	12/12/19	Both	<input type="checkbox"/>				
Community Building	Email Blast--November 2019	11/20/19	11/20/19	Both	<input type="checkbox"/>				
Community Building	Email Blast--December 2019	12/18/19	12/18/19	Both	<input type="checkbox"/>				
Enrollment	Create recruitment postcard (to hand out as well as mail)	01/01/20	01/09/20	Both	<input type="checkbox"/>				
Enrollment	Establish student recruiting goals of at least 125% of projected student enrollment in year one; and 115% in subsequent years	01/01/20	01/09/20	Both	<input type="checkbox"/>				
Enrollment	Develop enrollment benchmarks (incl. dates), with deadline for initiating back-up recruiting plan if targets are not hit at least 60 days before scheduled school opening	01/01/20	01/09/20	Both	<input type="checkbox"/>				
FinOps	Review multiple Student Information Systems (SIS)	01/01/20	02/11/20	Both	<input type="checkbox"/>				
FinOps	Procure or identify Student Information System (SIS)	01/01/20	02/11/20	Both	<input type="checkbox"/>				
Communications	Include a media release form in our school's enrollment packets so that reporters can visit our school and we can feature photos and video of students in our marketing materials and website.	02/01/20	02/19/20	Both	<input type="checkbox"/>				
Fundraising	Confirm funding commitments			Both	<input type="checkbox"/>				
Board	Announce meetings according to open meetings law		TBD		<input type="checkbox"/>				
Board	Develop schedule to initiate long range Strategic Planning process		TBD		<input type="checkbox"/>				
Board	Elect board offices (president, secretary, treasurer, etc.)		TBD		<input type="checkbox"/>				
Board	Ensure that the school's board of trustees begins the process of engaging an independent auditor to complete the pre-operating financial review in time to meet the 1 statutory deadline.		TBD		<input type="checkbox"/>				
Board	Familiarize board and staff with funding methods, factors impacting funding streams, and timing for receipt of funds		TBD		<input type="checkbox"/>				
Board	Appoint design team member or board member to oversee financial responsibilities		TBD		<input type="checkbox"/>				
Board	Begin coaching meetings with Board on Track representative to gain knowledge about effective governance		TBD		<input type="checkbox"/>				
Budget	Apply for federal funding/Title grants.		TBD		<input type="checkbox"/>				
Budget	Identify start up costs. http://www.calcharters.org/2010/06/budget-workbook.html				<input type="checkbox"/>				
Budget	Draft planning year cash flow projections				<input type="checkbox"/>				
Communications	Determine school 1 name		TBD		<input type="checkbox"/>				
Communications	Agree on school colors.		TBD		<input type="checkbox"/>				
Community Building	The office staff are prepared to field calls from prospective parents in all languages spoken in our community.		TBD		<input type="checkbox"/>				
Community Building	Email Blast--January 2020		TBD		<input type="checkbox"/>				
Community Building	Email Blast--February 2020		TBD		<input type="checkbox"/>				
Community Building	Email Blast--March 2020		TBD		<input type="checkbox"/>				
Community Building	Email Blast--April 2020		TBD		<input type="checkbox"/>				
Community Building	Email Blast--May 2020		TBD		<input type="checkbox"/>				
Community Building	Email Blast--June 2020		TBD		<input type="checkbox"/>				
Community Building	Email Blast--July 2020		TBD		<input type="checkbox"/>				
Community Building	Scheule: Heather Carrell				<input type="checkbox"/>				
Community Building	Schedule: Marci Cornell Feist				<input type="checkbox"/>				
Community Building	Email Supt and Alyson Rotter with press release				<input type="checkbox"/>				
Enrollment	Procure student list.				<input type="checkbox"/>				
Facilities	Attend a Building and Planning Commission Meeting.		TBD		<input type="checkbox"/>				
FinOps	File Statement of Information (Secretary of State)		TBD		<input type="checkbox"/>				
FinOps	Register with Office of Attorney General		TBD		<input type="checkbox"/>				
FinOps	Get State AND Federal Employer Identification Numbers		TBD		<input type="checkbox"/>				

Category	Task Name	Start	Finish	Assigned To	Done	2018			
						Q1	Q2	Q3	Q4
FinOps	Get numbered by the state. For information, visit http://www.cde.ca.gov/sp/cs/re/chrterpkg.asp CCSA recommends getting numbered by May of the year the school will open in order to ensure the timely release of funds.		TBD		<input type="checkbox"/>				
FinOps	Review SBE numbering requirements and timetable		TBD		<input type="checkbox"/>				
FinOps	Get the application ready to apply for the Charter District School Code as soon as you get a number by the state.		TBD		<input type="checkbox"/>				
FinOps	Get copy of minutes approving your school (required to be included in your packet)		TBD		<input type="checkbox"/>				
FinOps	Apply for Charter District School Code (happens in a few weeks) from the CDE. They don't give you the CDS code until their boss (the board) has given you a charter school number.		TBD		<input type="checkbox"/>				
FinOps	Apply for a Dun number from Dun and Bradstreet in August. This is needed to apply for the SAM code. The Dun number and SAM Code are needed to receive any federal funding. http://fedgov.dnb.com/webform/displayHomePage.do?sessionId=81407B1F03F2BD8123DD47D19158B75F		TBD		<input type="checkbox"/>				
FinOps	Apply in December for the SAM (Systems of Account Management) Code. Go to the federal treasury website. This allows you to receive the PCSGP funds once you've been approved, as well as do DOJ background checks. https://www.sam.gov/portal/SAM/##11		TBD		<input type="checkbox"/>				
FinOps	Apply for Dept of Justice ORI (reporting code) to do live scans on background checks.		TBD		<input type="checkbox"/>				
FinOps	Apply for background checks as soon as petition is approved, and you'll receive approval in 2 months.		TBD		<input type="checkbox"/>				
FinOps	Hire a back-office provider to apply for the revolving loan from the Charter School Finance Authority		TBD		<input type="checkbox"/>				
FinOps	Get authorized by the state food authority in order to receive state-subsidized food. Submit all the paperwork in May.		TBD		<input type="checkbox"/>				
FinOps	Hire a back-office provider to get authorized and manage the process in December.		TBD		<input type="checkbox"/>				
FinOps	Send out all RFPs for food service in January/February 2020		TBD		<input type="checkbox"/>				
FinOps	Approve appropriate contracts, purchases, benefits, hires, and school site safety/risk management plan		TBD		<input type="checkbox"/>				
FinOps	Ensure the school has all necessary policies in place (safety procedures, disaster plan, insurance plans, etc.)		TBD		<input type="checkbox"/>				
FinOps	Update budgets & develop contingency plans.		TBD		<input type="checkbox"/>				
FinOps	Verify criteria for including grants and soft money in application projections		TBD		<input type="checkbox"/>				
FinOps	Update staffing chart with associated costs based on relevant factors (i.e., training and experience average costs, industry standards, benefits, etc.)		TBD		<input type="checkbox"/>				
FinOps	Update necessary budgets (3-5 year budget and monthly cash flow statements)		TBD		<input type="checkbox"/>				
FinOps	Develop a contingency plan for austerity or financial hardship		TBD		<input type="checkbox"/>				
FinOps	Prepare worst case financial projections including only committed revenues or revenues allowable per authorizer and statutory guidelines		TBD		<input type="checkbox"/>				
FinOps	Identify all State, federal, and private planning and start-up grants available		TBD		<input type="checkbox"/>				
FinOps	Establish financial structures, policies, & staffing		TBD		<input type="checkbox"/>				
FinOps	Identify CFO and/or back office provider		TBD		<input type="checkbox"/>				
FinOps	Finalize post-approval financial management plan		TBD		<input type="checkbox"/>				
FinOps	Research options for accounting software if financial planning, management, and accounting if not done through authorizer or back office provider		TBD		<input type="checkbox"/>				
FinOps	Identify external auditor and develop audit preparation process		TBD		<input type="checkbox"/>				
FinOps	Apply for Revolving Loan, if applicable in WA About the Revolving Loan: http://www.calcharters.org/2010/05/charter-school-revolving-loan-fund.html		TBD		<input type="checkbox"/>				
FinOps	Develop / convert templates for student records to meet state reporting requirements		TBD		<input type="checkbox"/>				
FinOps	Submit enrollment count to authorizer by grade, gender, race, school of attendance, district, etc.		TBD		<input type="checkbox"/>				
FinOps	Create health and safety plan in alignment with state regulations		TBD		<input type="checkbox"/>				
FinOps	Submit Title I Application.		TBD		<input type="checkbox"/>				

Category	Task Name	Start	Finish	Assigned To	Done	2018			
						Q1	Q2	Q3	Q4
FinOps	Learn about food services in CA: If you do provide food services, there are a number of nutrition and reporting requirements. You can read more about those requirements in Managing Your USDA-Compliant Foodservice Program (http://www.calcharters.org/2010/06/managing-your-usda-compliant-foodservice-program-.html).		TBD		<input type="checkbox"/>				
FinOps	Determine if sending district can provide food, and determine if it is a viable option (healthy, cost, logistics, etc.).		TBD		<input type="checkbox"/>				
FinOps	Determine likelihood of eligibility for F&RP federal meals program (based on target community and anticipated student population)		TBD		<input type="checkbox"/>				
FinOps	Determine whether meals will be prepared on the school site (if the school has a cafeteria) or contracted out		TBD		<input type="checkbox"/>				
FinOps	If food will be prepared on site, determine standards and policies for food program		TBD		<input type="checkbox"/>				
FinOps	If food will be prepared on site, create budget with possible fees charged, staffing and equipment needs, and any other equipment costs		TBD		<input type="checkbox"/>				
FinOps	If food will be contracted out, research potential vendors		TBD		<input type="checkbox"/>				
FinOps	If food will be contracted out, plan budget for serving and food costs		TBD		<input type="checkbox"/>				
FinOps	Consider facilities needs for food storage, cooling, heating, and serving		TBD		<input type="checkbox"/>				
FinOps	Determine method for collecting and monitoring costs		TBD		<input type="checkbox"/>				
FinOps	Determine personnel and processes required for reporting		TBD		<input type="checkbox"/>				
FinOps	Determine state and federal requirements related to health and nutrition and food service preparation and facility requirements and related costs		TBD		<input type="checkbox"/>				
FinOps	If needed, hire a food vendor.		TBD		<input type="checkbox"/>				
FinOps	Collect all meal application forms from students, if applicable.		TBD		<input type="checkbox"/>				
FinOps	Document daily logistics related to breakfast		TBD		<input type="checkbox"/>				
FinOps	Document daily logistics related to lunch		TBD		<input type="checkbox"/>				
FinOps	Document daily logistics related to snack		TBD		<input type="checkbox"/>				
FinOps	Finalize Operations Playbook		TBD		<input type="checkbox"/>				
FinOps	Set up payroll and benefits for new staff		TBD		<input type="checkbox"/>				
FinOps	Finalize plan for teacher and staff laptops		TBD		<input type="checkbox"/>				
FinOps	Finalize Working Conditions Acknowledgement Forms for all positions		TBD		<input type="checkbox"/>				
FinOps	Negotiate contracts with curricular providers		TBD		<input type="checkbox"/>				
FinOps	Create Procurement Planning & Tracking document to capture needs and track progress		TBD		<input type="checkbox"/>				
FinOps	Determine purchasing categories and assign roles for each		TBD		<input type="checkbox"/>				
FinOps	Purchase curricula/textbooks		TBD		<input type="checkbox"/>				
FinOps	Complete vendor outreach and prepare orders to be placed		TBD		<input type="checkbox"/>				
FinOps	Purchase cell phones		TBD		<input type="checkbox"/>				
FinOps	Purchase computers		TBD		<input type="checkbox"/>				
FinOps	Purchase copiers/fax		TBD		<input type="checkbox"/>				
FinOps	Purchase software		TBD		<input type="checkbox"/>				
FinOps	Purchase furniture		TBD		<input type="checkbox"/>				
FinOps	Purchase internal communication (cell phones, walkie talkies, etc.)		TBD		<input type="checkbox"/>				
FinOps	Purchase equipment		TBD		<input type="checkbox"/>				
FinOps	Purchase paper		TBD		<input type="checkbox"/>				
FinOps	Purchase ELA materials: books, white boards, shelves, tools, etc.		TBD		<input type="checkbox"/>				
FinOps	Purchase math materials: manipulatives, white boards, books, tools.		TBD		<input type="checkbox"/>				
FinOps	Purchase science materials: books, microscopes, slides, dissection kits, goggles, gloves, beakers, etc. or FOSS kits, if appropriate.		TBD		<input type="checkbox"/>				
FinOps	Determine storage location for all school supplies throughout the building		TBD		<input type="checkbox"/>				
FinOps	Purchase office, classroom and workroom supplies for staff		TBD		<input type="checkbox"/>				
FinOps	Purchase uniforms		TBD		<input type="checkbox"/>				
FinOps	Purchase library books		TBD		<input type="checkbox"/>				
FinOps			TBD		<input type="checkbox"/>				
FinOps	Set up staff fingerprinting process.		TBD		<input type="checkbox"/>				
FinOps	Training and planning for confidential materials and student records complete (ex: storage and length of time required, cumulative folders, shredding, etc.)		TBD		<input type="checkbox"/>				

Category	Task Name	Start	Finish	Assigned To	Done	2018			
						Q1	Q2	Q3	Q4
FinOps	Medical plan in place for storing prescription medicines, accessing/using defibrillators, making 911 calls, etc.		TBD		<input type="checkbox"/>				
FinOps	Medical staff/nursing requirements (staff and space) identified and accounted for in plan (budget, staffing, facilities, resource procurement)		TBD		<input type="checkbox"/>				
FinOps	Research FERPA laws and compliance measures		TBD		<input type="checkbox"/>				
FinOps	Consult legal to find out what insurance is needed.		TBD		<input type="checkbox"/>				
FinOps	Purchase insurance plan/coverage for new school in place (including Directors and Officers – D&O – insurance)		TBD		<input type="checkbox"/>				
FinOps	Create procedure for filing 51A and CHINS.		TBD		<input type="checkbox"/>				
FinOps	Plan to teach staff about 51A and CHINS.		TBD		<input type="checkbox"/>				
FinOps	Learn more about E-Rate. E-Rate is a federal program that will deduct 90% of the cost of internet and IT infrastructure and phone. Can save you thousands of dollars.		TBD		<input type="checkbox"/>				
FinOps	Hire an E-Rate contractor by September before you open the school, and register with them. The process is so technical and complicated that this person is necessary. They need to be local so they can do a walk-through of your site. Mallory Dwinal recommends Eileen Miller (emiller@learningtech.org)		TBD		<input type="checkbox"/>				
FinOps	Determine layout and placement of white boards and other classroom installation needs		TBD		<input type="checkbox"/>				
FinOps	Finalize plan for phones throughout the school		TBD		<input type="checkbox"/>				
FinOps	Finalize technology plan for individual classrooms (phones, projectors, docking stations, etc.)		TBD		<input type="checkbox"/>				
FinOps	Finalize technology plan for computer lab		TBD		<input type="checkbox"/>				
FinOps	Determine technology needs based on proposed educational plan requirements		TBD		<input type="checkbox"/>				
FinOps	Revisit Student Information System plan based on evolving assessment plan		TBD		<input type="checkbox"/>				
FinOps	Determine E-Rate discount eligibility (depending on location and facility prospects)		TBD		<input type="checkbox"/>				
FinOps	Develop "executive summary" technology plan narrative for inclusion in text of school application		TBD		<input type="checkbox"/>				
FinOps	Develop a three to five year technology plan		TBD		<input type="checkbox"/>				
FinOps	Identify staffing and physical resources needed		TBD		<input type="checkbox"/>				
FinOps	Make final determinations for computer and technology needs for Year 1		TBD		<input type="checkbox"/>				
FinOps	Finalize basic instructional and operational technology plan, including determining if school is eligible for e-rate discount program		TBD		<input type="checkbox"/>				
FinOps	Finalize technology plan for all offices throughout the building		TBD		<input type="checkbox"/>				
FinOps	Determine student transportation requirements (particularly for students with an IEP)		TBD		<input type="checkbox"/>				
FinOps	Explore and confirm public transportation options for potential school location		TBD		<input type="checkbox"/>				
FinOps	Decide if school will provide non-required transportation		TBD		<input type="checkbox"/>				
FinOps	Research costs for transporting students		TBD		<input type="checkbox"/>				
FinOps	Develop a transportation plan including vehicles, staffing, training, licensure, routes and times, transportation zone, etc.		TBD		<input type="checkbox"/>				
FinOps	Delegate tasks to school personnel to carry out transportation plan		TBD		<input type="checkbox"/>				
FinOps	Bus contract approved and signed		TBD		<input type="checkbox"/>				
FinOps	Traffic flow on campus mapped for morning drop off and afternoon pick up (bus and parent)		TBD		<input type="checkbox"/>				
FinOps	Staffing plan for morning drop off and afternoon pick up created		TBD		<input type="checkbox"/>				
Pilot	Conduct pre-assessment for pilot program		TBD		<input type="checkbox"/>				
Pilot	Conduct post-assessment for pilot program		TBD		<input type="checkbox"/>				
Pilot	Communicate story and results of pilot program to constituents		TBD		<input type="checkbox"/>				
School Planning	Establish clear roles and responsibilities for each member of the founding team.		TBD		<input type="checkbox"/>				
School Planning	Clarify standards and expectations for student performance, grading, and promotion and align with state or local standards		TBD		<input type="checkbox"/>				
School Planning	Clarify organizational performance goals		TBD		<input type="checkbox"/>				
School Planning	Clarify financial performance goals.		TBD		<input type="checkbox"/>				
School Planning	Clarify management performance goals		TBD		<input type="checkbox"/>				
School Planning	Create a plan to gather baseline student data		TBD		<input type="checkbox"/>				
School Planning	Determine required standardized assessments.		TBD		<input type="checkbox"/>				
School Planning	Determine if we're using any external providers for assessment (ANet)		TBD		<input type="checkbox"/>				

Category	Task Name	Start	Finish	Assigned To	Done	2018			
						Q1	Q2	Q3	Q4
School Planning	Determine interim assessments or develop plan to create them		TBD		<input type="checkbox"/>				
School Planning	Determine additional baseline assessments		TBD		<input type="checkbox"/>				
School Planning	Determine desired use of student performance data and create process to analyze student results		TBD		<input type="checkbox"/>				
School Planning	Develop external assessment schedules / timing, based on intended use of results		TBD		<input type="checkbox"/>				
School Planning	Develop internal assessment schedules / timing, based on intended use of results		TBD		<input type="checkbox"/>				
School Planning	Identify tools/technology used for assessment		TBD		<input type="checkbox"/>				
School Planning	Finalize promotion/graduation requirements		TBD		<input type="checkbox"/>				
School Planning	Finalize 501c3 status with IRS, if not complete already. review Steps 4–6 in Incorporating Your Charter School: http://www.calcharters.org/2010/05/incorporating-your-charter-school.html		TBD		<input type="checkbox"/>				
School Planning	Create plan for home visits, if applicable.		TBD		<input type="checkbox"/>				
School Planning	Plan student/parent orientation		TBD		<input type="checkbox"/>				
School Planning	Hold student/parent orientation		TBD		<input type="checkbox"/>				
School Planning	Obtain student "cumulative" files from District		TBD		<input type="checkbox"/>				
School Planning	Collect Home Language Surveys		TBD		<input type="checkbox"/>				
School Planning	Collect IEPs from sending schools		TBD		<input type="checkbox"/>				
School Planning	Organize IEPs in files		TBD		<input type="checkbox"/>				
School Planning	Translate IEPs into service delivery data		TBD		<input type="checkbox"/>				
School Planning	Check for renewal dates on IEPs		TBD		<input type="checkbox"/>				
School Planning	Schedule conferences with families of students with IEPs, if necessary		TBD		<input type="checkbox"/>				
School Planning	Develop confidentiality policy for student records, including filing system safeguards		TBD		<input type="checkbox"/>				
School Planning	Determine which diagnostic tests to use for reading and math		TBD		<input type="checkbox"/>				
School Planning	Determine diagnostic testing calendar (before school starts, at beginning of school?)		TBD		<input type="checkbox"/>				
School Planning	Plan to administer CELDT within first 30 days of school		TBD		<input type="checkbox"/>				
School Planning	Administer diagnostic tests once student is enrolled		TBD		<input type="checkbox"/>				
School Planning	Review sample handbooks: http://www.calcharters.org/2010/06/D9h2kbA/HOQsAmy/q1yvBdR/a8zYeo/parent_teamandfamilyhandbookkippheartwoodacademy.pdf		TBD		<input type="checkbox"/>				
School Planning	Determine ongoing parent leadership structures and write up		TBD		<input type="checkbox"/>				
School Planning	Write school/family compact		TBD		<input type="checkbox"/>				
School Planning	Write Volunteer policies (fingerprinting, use of cars, etc.)		TBD		<input type="checkbox"/>				
School Planning	Write school discipline policy		TBD		<input type="checkbox"/>				
School Planning	Have the handbook translated into appropriate languages.		TBD		<input type="checkbox"/>				
School Planning	Plan family orientation.		TBD		<input type="checkbox"/>				
School Planning	Hold family orientation		TBD		<input type="checkbox"/>				
School Planning	Document furniture needs		TBD		<input type="checkbox"/>				
School Planning	Read the Playbook Playbook. https://docs.google.com/document/d/196-QLJ3ZLAq9YEuDKUE92VKOZmm5PK0HCMAaQ4CHPmA/edit		TBD		<input type="checkbox"/>				
School Planning	Revise school culture vision and finalize in student and staff playbook		TBD		<input type="checkbox"/>				
School Planning	Write or revise school culture goals for the first year		TBD		<input type="checkbox"/>				
School Planning	Write procedures for arrival		TBD		<input type="checkbox"/>				
School Planning	Write procedures for dismissal		TBD		<input type="checkbox"/>				
School Planning	Write procedures for passing between periods (if applicable)		TBD		<input type="checkbox"/>				
School Planning	Write the school-wide classroom procedures for getting the teacher's attention		TBD		<input type="checkbox"/>				
School Planning	Write the school-wide classroom procedures for going to the bathroom		TBD		<input type="checkbox"/>				
School Planning	Write the school-wide classroom procedures for student materials		TBD		<input type="checkbox"/>				
School Planning	Write the school-wide classroom procedures for answering questions/having a discussion		TBD		<input type="checkbox"/>				
School Planning	Write the school-wide classroom procedures for breaks and recess		TBD		<input type="checkbox"/>				
School Planning	Write the school-wide classroom procedures for lunch		TBD		<input type="checkbox"/>				
School Planning	Revise the code of discipline		TBD		<input type="checkbox"/>				
School Planning	Write a ladder of consequences, and the logical behaviors that correlate with each		TBD		<input type="checkbox"/>				
School Planning	Determine school-wide behavioral management system.		TBD		<input type="checkbox"/>				

Category	Task Name	Start	Finish	Assigned To	Done	2018			
						Q1	Q2	Q3	Q4
School Planning	Finalize school culture incentive system (e.g. Core Value Club)		TBD		<input type="checkbox"/>				
School Planning	Write discipline procedures (dean's office protocols, detention, etc.)		TBD		<input type="checkbox"/>				
School Planning	Create protocols for disciplining students with special needs, including tracking suspensions and creation/implementation of behavior plans.		TBD		<input type="checkbox"/>				
School Planning	Draft system for students who repeatedly struggle to meet behavioral expectations		TBD		<input type="checkbox"/>				
School Planning	Character ed grade level mission statement		TBD		<input type="checkbox"/>				
School Planning	Finalize the character education standards		TBD		<input type="checkbox"/>				
School Planning	Write staff expectations for school-wide behavioral management system		TBD		<input type="checkbox"/>				
School Planning	Norm on behavioral expectations with your staff through role plays and simulations		TBD		<input type="checkbox"/>				
School Planning	Create a culture calendar		TBD		<input type="checkbox"/>				
School Planning	Write a core values chant		TBD		<input type="checkbox"/>				
School Planning	Get feedback on culture playbook from outside source		TBD		<input type="checkbox"/>				
School Planning	Finalize culture playbook		TBD		<input type="checkbox"/>				
School Planning	Use culture playbook to train incoming staff on vision, goals, routines and procedures, and behavioral management system.		TBD		<input type="checkbox"/>				
School Planning	Write staff professional norms		TBD		<input type="checkbox"/>				
School Planning	Norm with staff on professional norms, i.e. dress code, tardiness, email norms, etc.		TBD		<input type="checkbox"/>				
School Planning	Parent communication plan identified and templates created (ex: monthly newsletter)		TBD		<input type="checkbox"/>				
School Planning	Stakeholder feedback plan created and calendared (ex: student surveys, parent surveys, staff surveys, etc)		TBD		<input type="checkbox"/>				
School Planning	Essential artifacts identified and obtained (ex: college banners, Class Of signage, murals, etc)		TBD		<input type="checkbox"/>				
School Planning	Parent Meeting forms created		TBD		<input type="checkbox"/>				
School Planning	Family Nights/Community Engagement Events schedule for the year		TBD		<input type="checkbox"/>				
School Planning	Write crisis plan		TBD		<input type="checkbox"/>				
School Planning	Determine protocol for bus incidents and follow up.		TBD		<input type="checkbox"/>				
School Planning	Meet local police officials and provide them with contact information.		TBD		<input type="checkbox"/>				
School Planning	Determine middle school honor roll assembly dates and place on calendar		TBD		<input type="checkbox"/>				
School Planning	Finalize staff schedules, including end time in day		TBD		<input type="checkbox"/>				
School Planning	Finalize student schedule including dismissal time		TBD		<input type="checkbox"/>				
School Planning	Determine any school-wide field trips and put those on the calendar		TBD		<input type="checkbox"/>				
School Planning	Data Days/Dives identified and calendared		TBD		<input type="checkbox"/>				
School Planning	Finalize annual calendar that has all dates--holidays, assessments, parent nights, etc.		TBD		<input type="checkbox"/>				
School Planning	Determine quarter or trimester schedule		TBD		<input type="checkbox"/>				
School Planning	Determine when grades are due/report cards sent home		TBD		<input type="checkbox"/>				
School Planning	Finalize format of student report cards		TBD		<input type="checkbox"/>				
School Planning	Determine when mid-trimester progress reports are due		TBD		<input type="checkbox"/>				
School Planning	Determine dates of report card nights		TBD		<input type="checkbox"/>				
School Planning	Finalize teacher common planning blocks		TBD		<input type="checkbox"/>				
School Planning	Determine expectations for teachers during common planning blocks		TBD		<input type="checkbox"/>				
School Planning	Create FTE grid and duty schedule		TBD		<input type="checkbox"/>				
School Planning	Classrooms assigned (teacher/subject) with full growth in mind		TBD		<input type="checkbox"/>				
School Planning	Class-to-class transitions planned/mapped		TBD		<input type="checkbox"/>				
School Planning	Create cafeteria plan (schedule of meals, traffic flow, etc)		TBD		<input type="checkbox"/>				
School Planning	Create Emergency manual and get approved by ED/CAO/COO and legal		TBD		<input type="checkbox"/>				
School Planning	Create class rosters		TBD		<input type="checkbox"/>				
School Planning	Create plan for parking lot, if appropriate		TBD		<input type="checkbox"/>				
School Planning	Create school-wide substitute coverage plan		TBD		<input type="checkbox"/>				
School Planning	Coordinate removal of trash/junk from facility		TBD		<input type="checkbox"/>				
School Planning	Create Summer School plan		TBD		<input type="checkbox"/>				
School Planning	Document policies for front desk/visitor management		TBD		<input type="checkbox"/>				
School Planning	Determine frequency and logistics of fire drills		TBD		<input type="checkbox"/>				

Category	Task Name	Start	Finish	Assigned To	Done	2018			
						Q1	Q2	Q3	Q4
School Planning	Set expectations for staff communication with families.		TBD		<input type="checkbox"/>				
School Planning	Develop a plan for Individual Family Home Visits.		TBD		<input type="checkbox"/>				
School Planning	Determine procedures for documenting family communication and monitoring frequency of communication.		TBD		<input type="checkbox"/>				
School Planning	Restraint training (or similar) needs identified and registered		TBD		<input type="checkbox"/>				
School Planning	Medical/health training needs identified and registered (ex: bloodborn pathogens, CPR, etc)		TBD		<input type="checkbox"/>				
School Planning	State testing training needs identified and registerd		TBD		<input type="checkbox"/>				
School Planning	ELL identification/support training needs identified and registered		TBD		<input type="checkbox"/>				
School Planning	Review Common Core State Standards for grade levels being taught.		TBD		<input type="checkbox"/>				
School Planning	Review key shifts in math and ELA in the Common Core so as to align your curriculum and decisions to these key shifts.		TBD		<input type="checkbox"/>				
School Planning	Select auxiliary curriculum		TBD		<input type="checkbox"/>				
School Planning	Determine scope and sequence for math classes for each grade.		TBD		<input type="checkbox"/>				
School Planning	Determine scope and sequence for ELA classes for each grade.		TBD		<input type="checkbox"/>				
School Planning	Determine scope and sequence for SS classes for each grade.		TBD		<input type="checkbox"/>				
School Planning	Determine scope and sequence for science classes for each grade.		TBD		<input type="checkbox"/>				
School Planning	Determine clear, viable process for curriculum use--how will teachers understand the key points of the unit, module, or lesson?		TBD		<input type="checkbox"/>				
School Planning	Determine clear, viable process for curriculum use--how will adapt the curriculum for their students' needs?		TBD		<input type="checkbox"/>				
School Planning	Create lesson template and unit planning template		TBD		<input type="checkbox"/>				
School Planning	Create exemplar lesson plan		TBD		<input type="checkbox"/>				
School Planning	Create exemplar unit plan		TBD		<input type="checkbox"/>				
School Planning	Create exemplar classwork		TBD		<input type="checkbox"/>				
School Planning	Create exemplar exit ticket and/or quiz		TBD		<input type="checkbox"/>				
School Planning	Create exemplar homework		TBD		<input type="checkbox"/>				
School Planning	Determine clear, viable process for curriculum use--how will teachers select aspects to use, and aspects to not use?		TBD		<input type="checkbox"/>				
School Planning	Align auxiliary curriculum with Common Core		TBD		<input type="checkbox"/>				
School Planning	Develop a system for monitoring the curriculum		TBD		<input type="checkbox"/>				
School Planning	Refine plan to meet anticipated student needs based on additional knowledge about the community and expert feedback		TBD		<input type="checkbox"/>				
School Planning	Determine before- and after-school programs and extracurricular options		TBD		<input type="checkbox"/>				
School Planning	Determine consistent file structure for housing curriculum		TBD		<input type="checkbox"/>				
School Planning	Finalize recommended book list for each grade level		TBD		<input type="checkbox"/>				
School Planning	Write school structures into the Playbook		TBD		<input type="checkbox"/>				
School Planning	Write an instructional vision that is compelling and rigorous.		TBD		<input type="checkbox"/>				
School Planning	Create classroom walk-through documents aligned to this vision.		TBD		<input type="checkbox"/>				
School Planning	Ensure teacher evaluation documents are aligned to this vision.		TBD		<input type="checkbox"/>				
School Planning	Finalize all ELA structures (outline components of literacy in the day and interaction of components)		TBD		<input type="checkbox"/>				
School Planning	Finalize all math structures to ensure rigor in all classrooms (conceptual understanding, fluency, and application).		TBD		<input type="checkbox"/>				
School Planning	Finalize intervention plan for ELA.		TBD		<input type="checkbox"/>				
School Planning	Finalize intervention plan for math.		TBD		<input type="checkbox"/>				
School Planning	Determine how our practice PARCC schedule relates to interim assessments (same thing, different?)		TBD		<input type="checkbox"/>				
School Planning	Finalize reading level assessment plan for grades K1-5		TBD		<input type="checkbox"/>				
School Planning	Determine practice assessment schedule		TBD		<input type="checkbox"/>				
School Planning	Write curricular expectations into the Playbook		TBD		<input type="checkbox"/>				
School Planning	Write vision for special populations--how are they included in the school? How do you communicate high expectations for all students? What is your school's approach?		TBD		<input type="checkbox"/>				
School Planning	Write clear process to identify students with special needs or students on 504 plans.		TBD		<input type="checkbox"/>				
School Planning	Write clear process to identify students who are ELL		TBD		<input type="checkbox"/>				
School Planning	Write clear process to identify students with social and emotional needs		TBD		<input type="checkbox"/>				
School Planning	Write clear process to identify students who are homeless		TBD		<input type="checkbox"/>				
School Planning	Write clear process to identify students who are low performing		TBD		<input type="checkbox"/>				
School Planning	Write clear process to identify students who are high performing		TBD		<input type="checkbox"/>				

Category	Task Name	Start	Finish	Assigned To	Done	2018			
						Q1	Q2	Q3	Q4
School Planning	Write clear process to serve students with special needs and students on 504 plans.		TBD		<input type="checkbox"/>				
School Planning	Write clear process to serve students who are ELL		TBD		<input type="checkbox"/>				
School Planning	Write clear process to serve students with social and emotional needs		TBD		<input type="checkbox"/>				
School Planning	Write clear process to serve students who are homeless		TBD		<input type="checkbox"/>				
School Planning	Write clear process to serve students who are low performing		TBD		<input type="checkbox"/>				
School Planning	Write clear process to serve students who are high performing		TBD		<input type="checkbox"/>				
School Planning	504 responsibilities plan created		TBD		<input type="checkbox"/>				
School Planning	Homebound services plan created		TBD		<input type="checkbox"/>				
School Planning	Determine guidelines (in compliance with IDEA, 504, and state/federal mandates) for special education, English Language Learners, students with social and emotional needs and homeless students		TBD		<input type="checkbox"/>				
School Planning	Integrate special needs service delivery into school model		TBD		<input type="checkbox"/>				
School Planning	Define roles and responsibilities for staff as it relates to special populations.		TBD		<input type="checkbox"/>				
School Planning	Determine who will oversee Special Education		TBD		<input type="checkbox"/>				
School Planning	Determine who will oversee ELL services		TBD		<input type="checkbox"/>				
School Planning	Determine who will oversee other special populations		TBD		<input type="checkbox"/>				
School Planning	Write clear process to exit services for all special populations		TBD		<input type="checkbox"/>				
School Planning	Finalize policies for special populations in the Playbook		TBD		<input type="checkbox"/>				
School Planning	If necessary, make modifications to your school leadership structure or job descriptions. (Keep in mind that significant changes may require a material revision to your charter.)		TBD		<input type="checkbox"/>				
School Planning	Draft leadership team meeting structures		TBD		<input type="checkbox"/>				
School Planning	Determine how your current leaders will grow as professionals.		TBD		<input type="checkbox"/>				
School Planning	Create a ladder for future leaders.		TBD		<input type="checkbox"/>				
School Planning	Determine the role your school leaders will play in the school design process.		TBD		<input type="checkbox"/>				
School Planning	Create a leadership succession plan. How will founding leadership delegate responsibilities to those that will carry on the work if they step down? Will they immediately step down, or slowly remove themselves from day-to-day operation while maintaining a position as a fundraiser or board member?		TBD		<input type="checkbox"/>				
School Planning	Determine plan for morning staff email		TBD		<input type="checkbox"/>				
School Planning	Determine logistics for afterschool providers		TBD		<input type="checkbox"/>				
School Planning	Learn about food service policies		TBD		<input type="checkbox"/>				
School Planning	Roles and Responsibilities drafted and approved by ED/CAO/COO/HR		TBD		<input type="checkbox"/>				
School Planning	1:1 meeting plan and materials created (frequency, agenda, etc)		TBD		<input type="checkbox"/>				
School Planning	Informal and formal evaluation tools and materials created		TBD		<input type="checkbox"/>				
School Planning	Walkthrough and observation forms created		TBD		<input type="checkbox"/>				
School Planning	Learn about school marketing: http://www.calcharters.org/2012/07/communications-community-outreach-and-marketing-for-school-developers.html		TBD		<input type="checkbox"/>				
School Planning	Create banners for inside the school		TBD		<input type="checkbox"/>				
School Planning	Put up banners inside the school		TBD		<input type="checkbox"/>				
School Planning	Buy swag for your staff with the logo		TBD		<input type="checkbox"/>				
School Planning	Review this checklist. http://www.calcharters.org/school_developers_marketing_communications_checklist.pdf		TBD		<input type="checkbox"/>				
School Planning	Refine further "school message" and determine primary spokesperson(s) for the school once the school opens		TBD		<input type="checkbox"/>				
School Planning	Develop strategy to elicit parent and community support and volunteers		TBD		<input type="checkbox"/>				
School Planning	Implement strategy to elicit parent and community support and volunteers		TBD		<input type="checkbox"/>				
School Planning	Begin negotiations with colleges for student interns,		TBD		<input type="checkbox"/>				
School Planning	Develop format and process for regular communication with parents and other community stakeholders -- include on-line		TBD		<input type="checkbox"/>				
School Planning	As available, announce approval, opening date, school leader, school location, and enrollment process		TBD		<input type="checkbox"/>				
School Planning	Formalize school partnerships		TBD		<input type="checkbox"/>				
School Planning	Send letter to neighbors introducing school, hours, etc., and invite them to event(s)		TBD		<input type="checkbox"/>				
School Planning	Finalize Curriculum/Instruction/Assessment Staff Playbook		TBD		<input type="checkbox"/>				
School Planning	Finalize Student Support section of C&I Playbook		TBD		<input type="checkbox"/>				

[illegible]

[illegible]

[illegible]

Column27

August 2020

School Launch!

Parent Leadership
Team

Board Meetings
Monthly Once
Approved
Continued Board
Recruitment
Committees Formed
and Meet

Build Donor
Base/Foundation
Outreach



Catalyst: Bremerton

Section 25: Attachment 26

Contents:

- Insurance Coverage

Section 25: Attachment 26

Insurance Coverage

Catalyst: Bremerton will maintain adequate insurance, including (but not limited to): indemnity, property insurance, general liability insurance, workers' compensation insurance, unemployment compensation insurance, motor vehicle insurance, and errors and omissions insurance covering the Board, School and employees, as set forth below:

- a. Comprehensive general liability: \$3,000,000
- b. Officers, directors and employees errors and omissions: \$50,000
- c. Professional liability insurance: \$1,000,000 per occurrence, plus \$3,000,000 for sexual molestation claims. Coverage must include coverage from claims of sexual molestation and corporal punishment and any sub-limits must be approved by the Commission.
- d. Data Breach Insurance: \$1,000,000
- e. Property insurance: As required by landlord or lender
- f. Transportation/Motor vehicle liability (if appropriate): \$3,000,000 per occurrence, which must include coverage for bodily injury and property damage; any sub-limits must be approved by the Commission. In addition, collision and comprehensive insurance against physical damage including theft shall be provided with a maximum deductible of \$1,000 for collision and \$1,000 for comprehensive coverage except when the cost of the coverage would exceed the value of the vehicle during the contract period.
- g. Fidelity/Crime Coverage: \$500,000
- h. Workers' compensation: Prior to performing work under this Contract, Catalyst: Bremerton shall provide or purchase industrial insurance coverage for its employees, as may be required of an "employer" as defined in RCW Title 51, and shall maintain full compliance with RCW Title 51 during the course of this Contract.

The Commission shall be named as an additional insured on all of these insurance policies. Catalyst: Bremerton will pay any deductible amounts attributable to any acts or omissions of Catalyst: Bremerton, its employees, or agents. Catalyst: Bremerton shall, by August 1st of each year, provide the Commission with proof of insurance as required by state law and Commission policy¹.

The estimated costs built into the financial workbook were provided by the Washington State Charter Schools Association.

¹ Language above was taken from the 2018 Washington State Charter School Commission 2018 Sample Contract found at https://charterschool.wa.gov/documents/2018-Sample-Contract.Final_-1.pdf



Catalyst: Bremerton

Section 27: Attachment 27

Contents:

- Financial Plan Workbook
- Sample Financial Processes and Procedures Handbook
- CBSM Financial Responsibility Breakdown

New Application Budget and Cash Flow Template Instructions

General Instructions and Notes for New Application Budgets and Cash Flows

- Complete/Use ALL EIGHT tabs to the right of the 'New Application Budget --->' placeholder tab.
- Enter information into the GRAY cells ONLY. All other cells are locked and should remain locked.
- Cells containing RED triangles in the upper right corner contain guidance on that particular line item.
- All 'Notes' and 'Descriptions of Assumptions' columns are editable. Adding as much detail as possible in these columns is encouraged.

School Info Tab

- Enter in the Lead Applicant's name, email and phone number.
- In the row 'Year One' select the fiscal year the school will be in it's first operational year.
- In the row 'School Days' enter in the number of days the proposed school will be open for instruction.

Enrollment Tab

- Enrollment Section: Enter in cells D8 - M20 the anticipated enrollment for the proposed school by grade by year. The first five years are mandatory as those enrollment assumptions will directly impact the five year budget/operational plan.
- Student Population Section: Enter in cells D29 - M60 (gray only) the anticipated percentage of students for each population designation. These percentages entered will automatically generate the number of students anticipated for that designation based on the total enrollment entered.
- Under the Student Population section, certain designations, i.e. Average Daily Membership, contain comments in the cells where the line name exists. These comments are provided for additional guidance.

OSPI Estimator Tool

- This tab is a tool created by OSPI to assist in establishing an accurate per pupil amount for the '3100 - Apportionment' revenue line.
- Enter in enrollment for YRs 1-5 (one year at a time; cells B3-B7). The tool will produce a per pupil amount for that year based on enrollment entered and district chosen (cell B17). Enter those yearly per pupil amounts in cells H33 - L33 on the 'Assumptions' tab. The per pupil amount entered will then be multiplied by the enrollment entered on the 'Enrollment' tab and will carry through to the '5 YR Budget' tab.

Personnel Tab

- Column C; Enter in the position title.
- Column D; Select from the drop down a category for which that position falls into. Categories contained in the dropdown align with the '5 YR Budget', 'Start-Up Budget' and 'Cash Flow' tabs.
*****PLEASE NOTE**** - Before selecting a category be sure to select the '5 YR Budget' tab to see where each category falls under in terms of the Personnel section.*
- Column E; Enter in the starting salary for that given position.
- Column F - J; Enter in the full-time equivalent (FTE) for that particular position for the given year.
- Cells N3 - R3; Enter in the anticipated percentage of salary increases for that given year. The table below row 3 will automatically calculate given the percentage entered, FTE and starting salary indicated.

Assumptions Tab

- Column C; All line descriptions are locked and are to remain locked except those shaded gray and named 'Custom'. Those lines can be edited by the applicant.
- Column E; Select either option 1, 2 or 3.
Option 1; Will generate a total based on a per pupil basis. For example, if an estimation of \$100 per student is desired, select option 1 in column E for that particular line and in column F (shaded green) enter in \$100. If enrollment is 100 students then the total for that line will be \$10,000 in Year 1.
Option 2; Will generate a total based on a per staff basis. For example, if an estimation of \$1,000 per staff FTE is desired, select option 2 in column E for that particular line and in column F (shaded blue) enter in \$1,000. If the school's FTE count is 20 then the total for that line will be \$20,000 in Year 1.
Option 3; Will generate a total based on the school. For example, if the desired amount for that line is \$25,000 for the year, select option 2 in column E for that particular line and in column F (shaded orange) enter in \$25,000.
- Columns H-L; enter in the percentage increase OR decrease that is anticipated for that particular line from year to year.
***** PLEASE NOTE**** - In the 'Payroll Taxes and Benefits' section; percentages entered will be that of total payroll for that particular year and NOT percentage of increase from year to year.*

5 YR Budget Tab

- Nothing needs to be entered into this tab other than assumptions in the 'Descriptions of Assumptions' column, column J. ALL revenues and expenses are automatically calculated based on the 'Enrollment', 'Personnel' and 'Assumptions' tabs.

Start-Up Budget Tab

- Column D; Enter the revenues and expense the proposed school expects to receive and incur during the start-up period.

Cash Flow Tab

New Application Budget and Cash Flow Template Instructions

- Columns D - J; Enter the revenues and expenses the proposed school anticipates receiving and incurring during the start-up phase in the corresponding months. The amounts received and incurred, as a whole, should tie out to the figures entered into the 'Start-Up Budget' tab. As a checks and balances, column K will compare the 'Start-Up Budget' tab versus the total column, column J, of the Cash Flow tab to ensure accuracy.
- Columns N - Y; Enter the revenues and expenses the proposed school anticipates receiving and incurring during **YEAR 1** in the corresponding months. The amounts received and incurred, as a whole, should tie out to the figures calculated in the '5 YR Budget' tab, column D. As a checks and balances, column AA will compare the '5 YR Budget' tab, Year 1, versus the total column, column Z, of the Cash Flow tab to ensure accuracy.

Catalyst: Bremerton

New Applicaton Budget(s) & Cash Flow(s) Template

Lead Applicant Name:	Amanda Gardener
Contact Email:	amanda@catalystpublicschools.org
Contact Phone:	617-233-4226
Year One:	2020-21
School Days:	185

	Enter Enroll
K-3 FTE	112.00
4 FTE	
5-6 FTE	112.00
7-8 FTE	
9-12 FTE	-
Total Enroll	224.00
Regionalization	1.18
Revenue 3100	2,136,557.30
Per Pupil	9,538.20

District	Regionalization (Pick from Drop-Down in A17)
Battle Ground	1.06
Bellevue	1.18
Bellingham	1.12
Bremerton	1.18
Federal Way	1.12
Ferndale	1.12
Highline	1.18
Kennewick	1.00
Kent	1.18
Pasco	1.00
Renton	1.18
Richland	1.06
Tacoma	1.12
Tukwila	1.18

Directions: Pick the district nearest to the proposed location of your school

Catalyst: Bremerton

Position Description	Position Category (Categories Match Up to the Categories on the Five Year Budget)	Starting Salary	Number of FTE					NOTES	Salary Totals				
			Year 1	Year 2	Year 3	Year 4	Year 5		Year 1	Year 2	Year 3	Year 4	Year 5
			2020-21	2021-22	2022-23	2023-24	2024-25		2020-21	2021-22	2022-23	2023-24	2024-25
									Yearly Raise %				
									0.00%	3.00%	3.00%	3.00%	3.00%
Co-Founder/CEO/Head of Middle School	Executive Management	\$ 130,000	1.0	1.0	0.0	0.0	0.0		\$ 130,000	\$ 133,900	\$ 7,917	\$ 8,155	\$ 8,399
Co-Founder/CAO/Head of Elementary	Instructional Management	\$ 130,000	1.0	1.0	0.0	0.0	0.0		\$ 130,000	\$ 133,900	\$ 7,917	\$ 8,155	\$ 8,399
Community Engagement Manager	Other - Administrative	\$ 50,000	1.0	1.0	0.0	0.0	0.0		\$ 50,000	\$ 51,500	\$ 3,045	\$ 3,136	\$ 3,230
Director of Finance and Operations	CFO / Director of Finance	\$ 90,000	1.0	1.0	0.0	0.0	0.0		\$ 90,000	\$ 92,700	\$ 5,481	\$ 5,645	\$ 5,815
Lead Teachers	Teachers - Regular	\$ 70,000	8.0	12.0	16.0	18.0	18.0		\$ 560,000	\$ 856,800	\$ 1,162,504	\$ 1,337,379	\$ 1,377,500
Small Group Instructors (SGIs)	Teachers - Regular	\$ 52,000	3.0	5.0	6.0	7.0	7.0		\$ 156,000	\$ 264,680	\$ 324,620	\$ 386,359	\$ 397,950
Special Education Teachers	Teachers - SPED	\$ 70,000	1.0	1.5	2.0	3.0	3.0		\$ 70,000	\$ 107,100	\$ 145,313	\$ 219,672	\$ 226,263
Special Education/ELL Aides	Teaching Assistants	\$ 40,000	1.0	1.0	1.0	1.0	1.0	#	\$ 40,000	\$ 41,200	\$ 42,436	\$ 43,709	\$ 45,020
Office Manager	Other - Administrative	\$ 40,000	1.0	1.0	1.0	1.0	1.0		\$ 40,000	\$ 41,200	\$ 42,436	\$ 43,709	\$ 45,020
Assistant Principal/Learning Specialist	Deans, Directors & Coordinators	\$ 85,000	0.0	0.0	1.0	1.0	1.0		\$ -	\$ -	\$ 85,000	\$ 87,550	\$ 90,177
Small Group Instructors (SGIs)	Teaching Assistants	\$ 40,000	3.0	5.0	6.0	8.0	8.0		\$ 120,000	\$ 203,600	\$ 249,708	\$ 337,199	\$ 347,315
Teachers in Training	Teaching Assistants	\$ 40,000	2.0	4.0	4.0	4.0	4.0		\$ 80,000	\$ 162,400	\$ 167,272	\$ 172,290	\$ 177,459
Principal	Instructional Management	\$ 100,000	0.0	0.0	1.0	1.0	1.0		\$ -	\$ -	\$ 100,000	\$ 103,000	\$ 106,090
Operations and Business Manager	Operation / Business Manager	\$ 70,000	0.0	0.0	1.0	1.0	1.0		\$ 1-	\$ -	\$ 70,000	\$ 72,100	\$ 74,263
			0.0	0.0	0.0	0.0	0.0		\$ -	\$ -	\$ -	\$ -	\$ -
			0.0	0.0	0.0	0.0	0.0		\$ -	\$ -	\$ -	\$ -	\$ -
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			0.0	0.0	0.0	0.0	0.0		\$ -	\$ -	\$ -	\$ -	\$ -
			0.0	0.0	0.0	0.0	0.0		\$ -	\$ -	\$ -	\$ -	\$ -
			0.0	0.0	0.0	0.0	0.0		\$ -	\$ -	\$ -	\$ -	\$ -
			0.0	0.0	0.0	0.0	0.0		\$ -	\$ -	\$ -	\$ -	\$ -
			0.0	0.0	0.0	0.0	0.0		\$ -	\$ -	\$ -	\$ -	\$ -
			0.0	0.0	0.0	0.0	0.0		\$ -	\$ -	\$ -	\$ -	\$ -
			0.0	0.0	0.0	0.0	0.0		\$ -	\$ -	\$ -	\$ -	\$ -
			0.0	0.0	0.0	0.0	0.0		\$ -	\$ -	\$ -	\$ -	\$ -
			0.0	0.0	0.0	0.0	0.0		\$ -	\$ -	\$ -	\$ -	\$ -
			0.0	0.0	0.0	0.0	0.0		\$ -	\$ -	\$ -	\$ -	\$ -
			0.0	0.0	0.0	0.0	0.0		\$ -	\$ -	\$ -	\$ -	\$ -
			0.0	0.0	0.0	0.0	0.0		\$ -	\$ -	\$ -	\$ -	\$ -
			0.0	0.0	0.0	0.0	0.0		\$ -	\$ -	\$ -	\$ -	\$ -
			0.0	0.0	0.0	0.0	0.0		\$ -	\$ -	\$ -	\$ -	\$ -
			0.0	0.0	0.0	0.0	0.0		\$ -	\$ -	\$ -	\$ -	\$ -
			0.0	0.0	0.0	0.0	0.0		\$ -	\$ -	\$ -	\$ -	\$ -
			0.0	0.0	0.0	0.0	0.0		\$ -	\$ -	\$ -	\$ -	\$ -
			0.0	0.0	0.0	0.0	0.0		\$ -	\$ -	\$ -	\$ -	\$ -
			0.0	0.0	0.0	0.0	0.0		\$ -				

REVENUE AND EXPENSE ASSUMPTIONS

			2020-21	2021-22	2022-23	2023-24	2024-25
ASSUMPTION KEY							
1	PER STUDENT						
2	PER STAFF						
3	PER SCHOOL						
REVENUE			Enter the % increase below for which the amount entered in column F should increase each year.				
1000 - LOCAL TAXES							
1100 - Local Property Tax		-	0.00%	0.00%	0.00%	0.00%	0.00%
1900 - Other Local Taxes		-	0.00%	0.00%	0.00%	0.00%	0.00%
Custom LOCAL TAXES		-	0.00%	0.00%	0.00%	0.00%	0.00%
TOTAL LOCAL TAXES							
2000 - LOCAL SUPPORT - NON-TAX							
2200 - Sale Of Goods, Supplies, & Services - Unassigned		-	0.00%	0.00%	0.00%	0.00%	0.00%
2500 - Gifts Grants, and Donations (Local)	3	400,000.00	0.00%	-100.00%	0.00%	0.00%	0.00%
NSVF Grant	3	300,000.00	0.00%	-100.00%	0.00%	0.00%	0.00%
TOTAL LOCAL SUPPORT - NON-TAX							
3000 - STATE REVENUE - GENERAL PURPOSE							
3100 - Apportionment			\$ 9,538.20	\$ 9,729.62	\$ 9,925.51	\$ 9,958.73	\$ 10,157.90
3121 - Special Education - General Apportionment		-	0.00%	0.00%	0.00%	0.00%	0.00%
Custom STATE REVENUE - GENERAL PURPOSE		-	0.00%	0.00%	0.00%	0.00%	0.00%
TOTAL STATE REVENUE - GENERAL PURPOSE							
4000 - STATE REVENUE - SPECIAL PURPOSE							
4121 - Special Education - State	1	8,873.00	0.00%	2.00%	2.00%	2.00%	2.00%
4155 - Learning Assistance	1	954.00	0.00%	2.00%	2.00%	2.00%	2.00%
4165 - Transitional Bilingual	1	1,295.00	0.00%	2.00%	2.00%	2.00%	2.00%
4174 - Highly Capable	1	590.00	0.00%	2.00%	2.00%	2.00%	2.00%
4198 - School Food Service			0.00%	0.00%	0.00%	0.00%	0.00%
4199 - Transportation - Operations	1	526.00	0.00%	2.00%	2.00%	2.00%	2.00%
Custom STATE REVENUE - SPECIAL PURPOSE		-	0.00%	0.00%	0.00%	0.00%	0.00%
TOTAL STATE REVENUE - SPECIAL PURPOSE							
5000 - FEDERAL REVENUE - GENERAL PURPOSE							
5200 - General Purpose Direct Fed. Grants - Unassigned		-	0.00%	0.00%	0.00%	0.00%	0.00%
Title I	1	320.00	0.00%	1.00%	1.00%	1.00%	1.00%
Title II	1	50.00	0.00%	1.00%	1.00%	1.00%	1.00%
Title III	1	70.00	0.00%	1.00%	1.00%	1.00%	1.00%
IDEA Funding	1	1,300.00	0.00%	1.00%	1.00%	1.00%	1.00%
CSP		-	0.00%	0.00%	0.00%	0.00%	0.00%
Total 5200 - General Purpose Direct Fed. Grants - Unassigned		-					
Custom FEDERAL REVENUE - GENERAL PURPOSE		-	0.00%	0.00%	0.00%	0.00%	0.00%
TOTAL FEDERAL REVENUE - GENERAL PURPOSE							

REVENUE AND EXPENSE ASSUMPTIONS

			2020-21	2021-22	2022-23	2023-24	2024-25
ASSUMPTION KEY							
1	PER STUDENT						
2	PER STAFF						
3	PER SCHOOL						
6000 - FEDERAL REVENUE - SPECIAL PURPOSE							
6100 - Special Purpose - OSPI Unassigned	-		0.00%	0.00%	0.00%	0.00%	0.00%
6198 - School Food Services	1 492.51		0.00%	1.00%	1.00%	1.00%	1.00%
Free Breakfast Reimbursement	-		0.00%	0.00%	0.00%	0.00%	0.00%
Reduced Breakfast Reimbursement	-		0.00%	0.00%	0.00%	0.00%	0.00%
Paid Breakfast Reimbursement	-		0.00%	0.00%	0.00%	0.00%	0.00%
Free Lunch Reimbursement	-		0.00%	0.00%	0.00%	0.00%	0.00%
Reduced Lunch Reimbursement	-		0.00%	0.00%	0.00%	0.00%	0.00%
Paid Lunch Reimbursement	-		0.00%	0.00%	0.00%	0.00%	0.00%
Snack Reimbursement	-		0.00%	0.00%	0.00%	0.00%	0.00%
Total 6198 - School Food Services							
Custom FEDERAL REVENUE - SPECIAL PURPOSE	-		0.00%	0.00%	0.00%	0.00%	0.00%
TOTAL FEDERAL REVENUE - SPECIAL PURPOSE							
7000 - OTHER SCHOOL DISTRICTS							
7100 - Program Participation, Unassigned	-		0.00%	0.00%	0.00%	0.00%	0.00%
Custom OTHER SCHOOL DISTRICTS	-		0.00%	0.00%	0.00%	0.00%	0.00%
TOTAL OTHER SCHOOL DISTRICTS							
8000 - OTHER ENTITIES							
8100 - Governmental Entities	-		0.00%	0.00%	0.00%	0.00%	0.00%
8200 - Private Foundations	-		0.00%	0.00%	0.00%	0.00%	0.00%
8500 - Educational Service Districts	-		0.00%	0.00%	0.00%	0.00%	0.00%
CMO Fee / Salary Offset	3 \$ 345,139.47		0.00%	26.94%	-94.44%	3.00%	3.00%
TOTAL OTHER ENTITIES							
9000 - OTHER FINANCING SOURCES							
9500 - Long-Term Financing	-		0.00%	0.00%	0.00%	0.00%	0.00%
9900 - Transfers	-		0.00%	0.00%	0.00%	0.00%	0.00%
Custom OTHER FINANCING SOURCES	-		0.00%	0.00%	0.00%	0.00%	0.00%
TOTAL OTHER FINANCING SOURCES							
TOTAL REVENUE							

REVENUE AND EXPENSE ASSUMPTIONS

2020-21 2021-22 2022-23 2023-24 2024-25

ASSUMPTION KEY

1	PER STUDENT
2	PER STAFF
3	PER SCHOOL

EXPENSES

ADMINISTRATIVE STAFF PERSONNEL COSTS

Executive Management
Instructional Management
Deans, Directors & Coordinators
CFO / Director of Finance
Operation / Business Manager
Administrative Staff
Other - Administrative

TOTAL ADMINISTRATIVE STAFF PERSONNEL COSTS

INSTRUCTIONAL PERSONNEL COSTS

Teachers - Regular
Teachers - SPED
Substitute Teachers
Teaching Assistants
Specialty Teachers
Aides
Therapists & Counselors
Other - Instructional

TOTAL INSTRUCTIONAL PERSONNEL COSTS

NON-INSTRUCTIONAL PERSONNEL COSTS

Nurse
Librarian
Custodian
Security
Other - Non-Instructional

TOTAL NON-INSTRUCTIONAL PERSONNEL COSTS

TOTAL PERSONNEL EXPENSES

PAYROLL TAXES AND BENEFITS

Social Security
Medicare
State Unemployment
Worker's Compensation Insurance
Custom Other Tax #1
Custom Other Tax #2
Health Insurance
Dental Insurance
Vision Insurance
Life Insurance
Retirement Contribution
Custom Fringe #1
Custom Fringe #2

For each line item in the Payroll, Taxes & Benefits section enter the % of Total Payroll that line item should represent.					
	6.20%	6.20%	6.20%	6.20%	6.20%
	1.45%	1.45%	1.45%	1.45%	1.45%
	1.82%	1.81%	1.74%	1.75%	1.70%
	2.00%	2.00%	2.00%	2.00%	2.00%
	0.00%	0.00%	0.00%	0.00%	0.00%
	0.00%	0.00%	0.00%	0.00%	0.00%
	9.71%	10.94%	12.23%	13.25%	14.15%
	0.00%	0.00%	0.00%	0.00%	0.00%
	0.00%	0.00%	0.00%	0.00%	0.00%
	0.00%	0.00%	0.00%	0.00%	0.00%
	13.58%	13.68%	13.77%	13.87%	13.96%
	0.00%	0.00%	0.00%	0.00%	0.00%
	0.00%	0.00%	0.00%	0.00%	0.00%

TOTAL PAYROLL TAXES AND BENEFITS

TOTAL PERSONNEL, TAX & BENEFIT EXPENSES

REVENUE AND EXPENSE ASSUMPTIONS

ASSUMPTION KEY

1	PER STUDENT
2	PER STAFF
3	PER SCHOOL

2020-21 2021-22 2022-23 2023-24 2024-25

CONTRACTED SERVICES

Accounting / Audit
Legal
Oversight Fee (3%)
Management Company Fee
Nurse Services
Food Service / School Lunch
Payroll Services
Special Ed Services
Titlement Services (i.e. Title I)
TMC contract
Back Office Services
WA Charters Membership

3	17,000.00
3	10,000.00
3	-
3	345,139.47
3	5,000.00
1	75.00
	-
3	150,000.00
	-
3	12,000.00
3	60,000.00
1	5.00

Enter the % increase below for which the amount entered in column F should increase each year.

0.00%	3.00%	-100.00%	0.00%	0.00%
0.00%	3.00%	-100.00%	0.00%	0.00%
3.00%	3.00%	3.00%	3.00%	3.00%
0.00%	26.94%	38.08%	13.29%	1.93%
0.00%	3.00%	3.00%	3.00%	3.00%
0.00%	3.00%	3.00%	3.00%	3.00%
0.00%	0.00%	0.00%	0.00%	0.00%
0.00%	3.00%	3.00%	3.00%	3.00%
0.00%	0.00%	0.00%	0.00%	0.00%
0.00%	3.00%	3.00%	3.00%	3.00%
0.00%	3.00%	3.00%	3.00%	3.00%
0.00%	0.00%	0.00%	0.00%	0.00%

TOTAL CONTRACTED SERVICES

SCHOOL OPERATIONS

Board Expenses
Classroom / Teaching Supplies & Materials
Special Ed Supplies & Materials
Textbooks / Workbooks
Supplies & Materials other
Equipment / Furniture
Telephone
Technology
Student Testing & Assessment
Field Trips
Transportation (student)
Student Services - other
Office Expense
Staff Development
Staff Recruitment
Student Recruitment / Marketing
School Meals / Lunch
Travel (Staff)
Fundraising
Software Licences
Student Information System
Technology for Staff

3	2,500.00
1	311.00
	-
	-
1	7.00
3	60,000.00
1	10.00
3	61,420.00
1	30.00
1	25.00
3	82,476.80
3	1,568.00
3	10,000.00
3	5,000.00
3	2,000.00
3	13,000.00
1	486.72
	-
	-
1	125.00
3	7,710.00
3	32,000.00

0.00%	3.00%	-100.00%	0.00%	0.00%
0.00%	3.00%	3.00%	3.00%	3.00%
0.00%	0.00%	0.00%	0.00%	0.00%
0.00%	0.00%	0.00%	0.00%	0.00%
0.00%	3.00%	3.00%	3.00%	3.00%
0.00%	-50.00%	0.00%	-50.00%	-90.00%
0.00%	0.00%	0.00%	0.00%	0.00%
0.00%	-50.00%	0.00%	-75.00%	-85.00%
0.00%	3.00%	3.00%	3.00%	3.00%
0.00%	3.00%	3.00%	3.00%	3.00%
0.00%	47.54%	30.96%	10.34%	-2.08%
0.00%	10.00%	10.00%	10.00%	10.00%
0.00%	2.00%	3.00%	2.00%	2.00%
0.00%	0.00%	0.00%	0.00%	0.00%
0.00%	0.00%	-100.00%	0.00%	0.00%
0.00%	-50.00%	-50.00%	-50.00%	-50.00%
0.00%	3.00%	3.00%	3.00%	3.00%
0.00%	0.00%	0.00%	0.00%	0.00%
0.00%	0.00%	0.00%	0.00%	0.00%
0.00%	3.00%	3.00%	3.00%	3.00%
0.00%	25.00%	25.00%	25.00%	3.00%
0.00%	-21.00%	-47.00%	-46.00%	-95.00%

TOTAL SCHOOL OPERATIONS

FACILITY OPERATION & MAINTENANCE

Insurance
Janitorial Services
Building and Land Rent / Lease
Repairs & Maintenance
Equipment / Furniture
Security Services
Utilities
Internet and Website Development
Custom Facilities Operations #2
Custom Facilities Operations #3

1	119.00
1	250.00
3	275,000.00
3	20,000.00
3	18,000.00
3	10,000.00
3	40,000.00
3	15,000.00
	-
	-

0.00%	3.00%	3.00%	3.00%	3.00%
0.00%	-20.00%	-10.00%	3.00%	3.00%
0.00%	3.00%	41.22%	3.00%	3.00%
0.00%	3.00%	3.00%	3.00%	3.00%
0.00%	3.00%	3.00%	3.00%	3.00%
0.00%	3.00%	3.00%	3.00%	3.00%
0.00%	3.00%	3.00%	3.00%	3.00%
0.00%	3.00%	3.00%	3.00%	3.00%
0.00%	0.00%	0.00%	0.00%	0.00%
0.00%	0.00%	0.00%	0.00%	0.00%

TOTAL FACILITY OPERATION & MAINTENANCE

RESERVES / CONTINGENCY

	-
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0.00%	0.00%	0.00%	0.00%	0.00%
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REVENUE AND EXPENSE ASSUMPTIONS

		2020-21	2021-22	2022-23	2023-24	2024-25								
	<table><tr><th colspan="2">ASSUMPTION KEY</th></tr><tr><td>1</td><td>PER STUDENT</td></tr><tr><td>2</td><td>PER STAFF</td></tr><tr><td>3</td><td>PER SCHOOL</td></tr></table>	ASSUMPTION KEY		1	PER STUDENT	2	PER STAFF	3	PER SCHOOL					
ASSUMPTION KEY														
1	PER STUDENT													
2	PER STAFF													
3	PER SCHOOL													
TOTAL EXPENSES														
NET OPERATING INCOME (before Depreciation)														
DEPRECIATION & AMORTIZATION	<table><tr><td></td><td>-</td></tr></table>		-	0.00%	0.00%	0.00%	0.00%	0.00%						
	-													
NET OPERATING INCOME (including Depreciation)														



NOTES / INSTRUCTIONS

WA Charters Grant

Enter in enrollment for YRs 1-5 (one year at a time; cells B3-B15) in the 'OSPI Estimator Tool' tab. The tool will produce a per pupil amount for that year based on enrollment entered and district chosen (cell B17). Enter those yearly per pupil amounts in cells H33 - L33 (do not enter an amount in cell F33). The per pupil amount entered will then be multiplied by the enrollment entered on the 'Enrollment' tab and will carry through to the '5 YR Budget' tab.

Calculates as total FRPL enrollment multiplied by per pupil amount entered in cell F40

Calculates as 5% total enrollment multiplied by per pupil amount entered in cell F42

NOTES / INSTRUCTIONS

Note: CMO fee will begin in year 3, this revenue offsets the expense in year 1 and 2 so that the CMO

NOTES / INSTRUCTIONS

2% of payroll up to \$47,300 (estimate)
2% of payroll (estimate)

12% increase YOY, inclusive of dental and vision, below



NOTES / INSTRUCTIONS

\$10K financial audit + \$7K SAO audit, expense moves to CMO in year 3
Expense moves to CMO in year 3
Calculates as 3% total revenue for lines 3100, 3121, 4121, 4155, 4165, 4174 & 4199

Included with back office support

OESD Contract, payroll, compliance reporting, finance support, expense moves to CMO in year 3

Board governance training, background checks, retreat costs, etc., expense moves to CMO in year 3
Includes classroom materials and supplies, classroom libraries, and elective materials
Included in Classroom/Teaching Supplies & Materials
Included in Classroom/Teaching Supplies & Materials
Postage

Student technology costs including iPads

\$736.4 per rider 40% loss in year 1 decreasing to 20% loss in year 5

Includes funding for summer program beginning in year 2

Laptops and iPads for staff--2K per staff member

NOTES / INSTRUCTIONS

Catalyst: Bremerton
PROJECTED BUDGET / OPERATING PLAN FOR INITIAL CHARTER PERIOD

SUMMARY
Total Revenue
Total Expenses
Net Income
Revenue Per Pupil
Expenses Per Pupil

3,796,534	4,819,149	6,073,540	6,878,292	7,011,133
3,630,503	4,779,171	5,753,220	6,556,410	6,733,298
166,031	39,979	320,321	321,882	277,834
16,949	14,343	13,557	13,647	13,911
16,208	14,224	12,842	13,009	13,360

Description of Assumptions

YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5
2020-21	2021-22	2022-23	2023-24	2024-25

REVENUE

1000 - LOCAL TAXES					
1100 - Local Property Tax	-	-	-	-	-
1900 - Other Local Taxes	-	-	-	-	-
Custom LOCAL TAXES	-	-	-	-	-
TOTAL LOCAL TAXES	\$ -	\$ -	\$ -	\$ -	\$ -
2000 - LOCAL SUPPORT - NON-TAX					
2200 - Sale Of Goods, Supplies, & Services - Unassigned	-	-	-	-	-
2500 - Gifts Grants, and Donations (Local)	400,000	-	-	-	-
NSVF Grant	300,000	-	-	-	-
TOTAL LOCAL SUPPORT - NON-TAX	\$ 700,000	\$ -	\$ -	\$ -	\$ -
3000 - STATE REVENUE - GENERAL PURPOSE					
3100 - Apportionment	2,136,557	3,269,151	4,446,627	5,019,197	5,119,581
3121 - Special Education - General Apportionment	-	-	-	-	-
Custom STATE REVENUE - GENERAL PURPOSE	-	-	-	-	-
TOTAL STATE REVENUE - GENERAL PURPOSE	\$ 2,136,557	\$ 3,269,151	\$ 4,446,627	\$ 5,019,197	\$ 5,119,581
4000 - STATE REVENUE - SPECIAL PURPOSE					
4121 - Special Education - State	198,755	456,143	703,069	806,771	822,907
4155 - Learning Assistance	138,902	212,521	289,028	331,660	338,293
4165 - Transitional Bilingual	17,405	26,629	36,216	41,558	42,389
4174 - Highly Capable	6,608	10,110	13,750	15,778	16,094
4198 - School Food Service	-	-	-	-	-
4199 - Transportation - Operations	58,912	90,135	122,584	140,665	143,479
Custom STATE REVENUE - SPECIAL PURPOSE	-	-	-	-	-
TOTAL STATE REVENUE - SPECIAL PURPOSE	\$ 420,582	\$ 795,539	\$ 1,164,647	\$ 1,336,432	\$ 1,363,161
5000 - FEDERAL REVENUE - GENERAL PURPOSE					
5200 - General Purpose Direct Fed. Grants - Unassigned	-	-	-	-	-
Title I	46,592	70,587	95,057	108,009	109,089
Title II	7,280	11,029	14,853	16,876	17,045
Title III	941	1,425	1,919	2,181	2,203
IDEA Funding	29,120	66,175	100,998	114,759	115,907
CSP	-	-	-	-	-
Total 5200 - General Purpose Direct Fed. Grants - Unassigned	\$ 83,933	\$ 149,217	\$ 212,827	\$ 241,825	\$ 244,243
Custom FEDERAL REVENUE - GENERAL PURPOSE	-	-	-	-	-
TOTAL FEDERAL REVENUE - GENERAL PURPOSE	\$ 83,933	\$ 149,217	\$ 212,827	\$ 241,825	\$ 244,243
6000 - FEDERAL REVENUE - SPECIAL PURPOSE					
6100 - Special Purpose - OSPI Unassigned	-	-	-	-	-
6198 - School Food Services	110,322	167,138	225,079	255,747	258,304
Free Breakfast Reimbursement	-	-	-	-	-
Reduced Breakfast Reimbursement	-	-	-	-	-
Paid Breakfast Reimbursement	-	-	-	-	-
Free Lunch Reimbursement	-	-	-	-	-
Reduced Lunch Reimbursement	-	-	-	-	-
Paid Lunch Reimbursement	-	-	-	-	-
Snack Reimbursement	-	-	-	-	-
Total 6198 - School Food Services	\$ 110,322	\$ 167,138	\$ 225,079	\$ 255,747	\$ 258,304
Custom FEDERAL REVENUE - SPECIAL PURPOSE	-	-	-	-	-
TOTAL FEDERAL REVENUE - SPECIAL PURPOSE	\$ 110,322	\$ 167,138	\$ 225,079	\$ 255,747	\$ 258,304
7000 - OTHER SCHOOL DISTRICTS					
7100 - Program Participation, Unassigned	-	-	-	-	-
Custom OTHER SCHOOL DISTRICTS	-	-	-	-	-
TOTAL OTHER SCHOOL DISTRICTS	\$ -	\$ -	\$ -	\$ -	\$ -
8000 - OTHER ENTITIES					
8100 - Governmental Entities	-	-	-	-	-
8200 - Private Foundations	-	-	-	-	-
8500 - Educational Service Districts	-	-	-	-	-
CMO Fee / Salary Offset	345,139	438,104	24,360	25,091	25,844
TOTAL OTHER ENTITIES	\$ 345,139	\$ 438,104	\$ 24,360	\$ 25,091	\$ 25,844
9000 - OTHER FINANCING SOURCES					
9500 - Long-Term Financing	-	-	-	-	-
9900 - Transfers	-	-	-	-	-
Custom OTHER FINANCING SOURCES	-	-	-	-	-
TOTAL OTHER FINANCING SOURCES	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL REVENUE	\$ 3,796,534	\$ 4,819,149	\$ 6,073,540	\$ 6,878,292	\$ 7,011,133

WA Charters Grant

#####

Calculates as total FRPL enrollment multiplied by per

Calculates as 5% total enrollment multiplied by per pupil

Note: CMO fee will begin in year 3, this revenue offsets

Catalyst: Bremerton
PROJECTED BUDGET / OPERATING PLAN FOR INITIAL CHARTER PERIOD

SUMMARY					
Total Revenue	3,796,534	4,819,149	6,073,540	6,878,292	7,011,133
Total Expenses	3,630,503	4,779,171	5,753,220	6,556,410	6,733,298
Net Income	166,031	39,979	320,321	321,882	277,834
Revenue Per Pupil	16,949	14,343	13,557	13,647	13,911
Expenses Per Pupil	16,208	14,224	12,842	13,009	13,360

Description of Assumptions

YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5
2020-21	2021-22	2022-23	2023-24	2024-25

EXPENSES

ADMINISTRATIVE STAFF PERSONNEL COSTS

Executive Management	130,000	133,900	7,917	8,155	8,399
Instructional Management	130,000	133,900	107,917	111,155	114,489
Deans, Directors & Coordinators	-	-	85,000	87,550	90,177
CFO / Director of Finance	90,000	92,700	5,481	5,645	5,815
Operation / Business Manager	-	-	70,000	72,100	74,263
Administrative Staff	-	-	-	-	-
Other - Administrative	90,000	92,700	45,481	46,845	48,251

TOTAL ADMINISTRATIVE STAFF PERSONNEL COSTS

\$	440,000	\$	453,200	\$	321,796	\$	331,450	\$	341,393
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INSTRUCTIONAL PERSONNEL COSTS

Teachers - Regular	716,000	1,121,480	1,487,124	1,723,738	1,775,450
Teachers - SPED	70,000	107,100	145,313	219,672	226,263
Substitute Teachers	-	-	-	-	-
Teaching Assistants	240,000	407,200	459,416	553,198	569,794
Specialty Teachers	-	-	-	-	-
Aides	-	-	-	-	-
Therapists & Counselors	-	-	-	-	-
Other - Instructional	-	-	-	-	-

TOTAL INSTRUCTIONAL PERSONNEL COSTS

\$	1,026,000	\$	1,635,780	\$	2,091,853	\$	2,496,609	\$	2,571,507
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NON-INSTRUCTIONAL PERSONNEL COSTS

Nurse	-	-	-	-	-
Librarian	-	-	-	-	-
Custodian	-	-	-	-	-
Security	-	-	-	-	-
Other - Non-Instructional	-	-	-	-	-

TOTAL NON-INSTRUCTIONAL PERSONNEL COSTS

\$	-	\$	-	\$	-	\$	-	\$	-
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TOTAL PERSONNEL EXPENSES

\$	1,466,000	\$	2,088,980	\$	2,413,649	\$	2,828,059	\$	2,912,901
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PAYROLL TAXES AND BENEFITS

Social Security	90,892	129,517	149,646	175,340	180,600
Medicare	21,257	30,290	34,998	41,007	42,237
State Unemployment	26,681	37,811	41,997	49,491	49,519
Worker's Compensation Insurance	29,320	41,780	48,273	56,561	58,258
Custom Other Tax #1	-	-	-	-	-
Custom Other Tax #2	-	-	-	-	-
Health Insurance	142,349	228,534	295,189	374,718	412,175
Dental Insurance	-	-	-	-	-
Vision Insurance	-	-	-	-	-
Life Insurance	-	-	-	-	-
Retirement Contribution	199,083	285,772	332,360	392,252	406,641
Custom Fringe #1	-	-	-	-	-
Custom Fringe #2	-	-	-	-	-

TOTAL PAYROLL TAXES AND BENEFITS

\$	509,582	\$	753,704	\$	902,464	\$	1,089,368	\$	1,149,431
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TOTAL PERSONNEL, TAX & BENEFIT EXPENSES

\$	1,975,582	\$	2,842,684	\$	3,316,113	\$	3,917,427	\$	4,062,331
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CONTRACTED SERVICES

Accounting / Audit	17,000	17,510	-	-	-
Legal	10,000	10,300	-	-	-
Oversight Fee (3%)	76,714	121,941	168,338	190,669	194,482
Management Company Fee	345,139	438,104	604,918	685,320	698,529
Nurse Services	5,000	5,150	5,305	5,464	5,628
Food Service / School Lunch	16,800	25,956	35,646	41,305	42,544
Payroll Services	-	-	-	-	-
Special Ed Services	150,000	154,500	159,135	163,909	168,826
Titlement Services (i.e. Title I)	-	-	-	-	-
TMC contract	12,000	12,360	12,731	13,113	13,506
Back Office Services	60,000	61,800	63,654	65,564	67,531
WA Charters Membership	1,120	1,680	2,240	2,520	2,520

TOTAL CONTRACTED SERVICES

\$	693,774	\$	849,301	\$	1,051,967	\$	1,167,863	\$	1,193,566
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2% of payroll up to \$47,300 (estimate)
2% of payroll (estimate)
12% increase YOY, inclusive of dental and vision, below
\$10K financial audit + \$7K SAO audit, expense moves to
Expense moves to CMO in year 3
Calculates as 3% total revenue for lines 3100, 3121, 4121,
Included with back office support
OESD Contract, payroll, compliance reporting, finance

Catalyst: Bremerton
PROJECTED BUDGET / OPERATING PLAN FOR INITIAL CHARTER PERIOD

SUMMARY						Description of Assumptions
Total Revenue	3,796,534	4,819,149	6,073,540	6,878,292	7,011,133	
Total Expenses	3,630,503	4,779,171	5,753,220	6,556,410	6,733,298	
Net Income	166,031	39,979	320,321	321,882	277,834	
Revenue Per Pupil	16,949	14,343	13,557	13,647	13,911	
Expenses Per Pupil	16,208	14,224	12,842	13,009	13,360	
	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5	
	2020-21	2021-22	2022-23	2023-24	2024-25	
SCHOOL OPERATIONS						
Board Expenses	2,500	2,575	-	-	-	Board governance training, background checks, retreat
Classroom / Teaching Supplies & Materials	69,664	107,631	147,813	171,278	176,417	Includes classroom materials and supplies, classroom
Special Ed Supplies & Materials	-	-	-	-	-	Included in Classroom/Teaching Supplies & Materials
Textbooks / Workbooks	-	-	-	-	-	Included in Classroom/Teaching Supplies & Materials
Supplies & Materials other	1,568	2,423	3,327	3,855	3,971	Postage
Equipment / Furniture	60,000	30,000	30,000	15,000	1,500	
Telephone	2,240	3,360	4,480	5,040	5,040	
Technology	61,420	30,710	30,710	7,678	1,152	Student technology costs including iPads
Student Testing & Assessment	6,720	10,382	14,258	16,522	17,018	
Field Trips	5,600	8,652	11,882	13,768	14,181	
Transportation (student)	82,477	121,683	159,359	175,832	172,174	\$736.4 per rider 40% loss in year 1 decreasing to 20%
Student Services - other	1,568	1,725	1,897	2,087	2,296	
Office Expense	10,000	10,200	10,506	10,716	10,930	
Staff Development	5,000	5,000	5,000	5,000	5,000	
Staff Recruitment	2,000	2,000	-	-	-	
Student Recruitment / Marketing	13,000	6,500	3,250	1,625	813	Includes funding for summer program beginning in year
School Meals / Lunch	109,025	168,444	231,330	268,053	276,095	
Travel (Staff)	-	-	-	-	-	
Fundraising	-	-	-	-	-	
Software Licences	28,000	43,260	59,410	68,842	70,907	
Student Information System	7,710	9,638	12,047	15,059	15,510	
Technology for Staff	32,000	25,280	13,398	7,235	362	Laptops and iPads for staff--2K per staff member
TOTAL SCHOOL OPERATIONS	\$ 500,492	\$ 589,462	\$ 738,669	\$ 787,590	\$ 773,365	
FACILITY OPERATION & MAINTENANCE						
Insurance	26,656	41,184	56,559	65,537	67,504	
Janitorial Services	56,000	67,200	80,640	93,442	96,245	
Building and Land Rent / Lease	275,000	283,250	400,000	412,000	424,360	
Repairs & Maintenance	20,000	20,600	21,218	21,855	22,510	
Equipment / Furniture	18,000	18,540	19,096	19,669	20,259	
Security Services	10,000	10,300	10,609	10,927	11,255	
Utilities	40,000	41,200	42,436	43,709	45,020	
Internet and Website Development	15,000	15,450	15,914	16,391	16,883	
Custom Facilities Operations #2	-	-	-	-	-	
Custom Facilities Operations #3	-	-	-	-	-	
TOTAL FACILITY OPERATION & MAINTENANCE	\$ 460,656	\$ 497,724	\$ 646,471	\$ 683,530	\$ 704,036	
RESERVES / CONTINGENCY	-	-	-	-	-	
TOTAL EXPENSES	\$ 3,630,503	\$ 4,779,171	\$ 5,753,220	\$ 6,556,410	\$ 6,733,298	
NET OPERATING INCOME (before Depreciation)	\$ 166,031	\$ 39,979	\$ 320,321	\$ 321,882	\$ 277,834	
DEPRECIATION & AMORTIZATION	-	-	-	-	-	
NET OPERATING INCOME (including Depreciation)	\$ 166,031	\$ 39,979	\$ 320,321	\$ 321,882	\$ 277,834	

Catalyst: Bremerton
PROJECTED START-UP BUDGET / OPERATING PLAN
FOR INITIAL CHARTER PERIOD

SUMMARY	
Total Revenue	615,000
Total Expenses	608,164
Net Income	6,836
Revenue Per Pupil	
Expenses Per Pupil	

Description of Assumptions

Start-Up
Period

REVENUE	
1000 - LOCAL TAXES	
1100 - Local Property Tax	-
1900 - Other Local Taxes	-
Custom LOCAL TAXES	-
TOTAL LOCAL TAXES	\$ -
2000 - LOCAL SUPPORT - NON-TAX	
2200 - Sale Of Goods, Supplies, & Services - Unassigned	-
2500 - Gifts Grants, and Donations (Local)	200,000
NSVF Grant	215,000
TOTAL LOCAL SUPPORT - NON-TAX	\$ 415,000
3000 - STATE REVENUE - GENERAL PURPOSE	
3100 - Apportionment	-
3121 - Special Education - General Apportionment	-
Custom STATE REVENUE - GENERAL PURPOSE	-
TOTAL STATE REVENUE - GENERAL PURPOSE	\$ -
4000 - STATE REVENUE - SPECIAL PURPOSE	
4121 - Special Education - State	-
4155 - Learning Assistance	-
4165 - Transitional Bilingual	-
4174 - Highly Capable	-
4198 - School Food Service	-
4199 - Transportation - Operations	-
Custom STATE REVENUE - SPECIAL PURPOSE	-
TOTAL STATE REVENUE - SPECIAL PURPOSE	\$ -
5000 - FEDERAL REVENUE - GENERAL PURPOSE	
5200 - General Purpose Direct Fed. Grants - Unassigned	-
Title I	-
Title II	-
Title III	-
IDEA Funding	-
CSP	200,000
Total 5200 - General Purpose Direct Fed. Grants - Unassigned	\$ 200,000
Custom FEDERAL REVENUE - GENERAL PURPOSE	-
TOTAL FEDERAL REVENUE - GENERAL PURPOSE	\$ 200,000
6000 - FEDERAL REVENUE - SPECIAL PURPOSE	
6100 - Special Purpose - OSPI Unassigned	-
6198 - School Food Services	-
Free Breakfast Reimbursement	-
Reduced Breakfast Reimbursement	-
Paid Breakfast Reimbursement	-
Free Lunch Reimbursement	-
Reduced Lunch Reimbursement	-
Paid Lunch Reimbursement	-
Snack Reimbursement	-
Total 6198 - School Food Services	\$ -
Custom FEDERAL REVENUE - SPECIAL PURPOSE	-
TOTAL FEDERAL REVENUE - SPECIAL PURPOSE	\$ -
7000 - OTHER SCHOOL DISTRICTS	
7100 - Program Participation, Unassigned	-
Custom OTHER SCHOOL DISTRICTS	-
TOTAL OTHER SCHOOL DISTRICTS	\$ -
8000 - OTHER ENTITIES	
8100 - Governmental Entities	-
8200 - Private Foundations	-
8500 - Educational Service Districts	-
CMO Fee / Salary Offset	-
TOTAL OTHER ENTITIES	\$ -
9000 - OTHER FINANCING SOURCES	
9500 - Long-Term Financing	-
9900 - Transfers	-

WA Charters Grant
NSVF Grant

Catalyst: Bremerton
PROJECTED START-UP BUDGET / OPERATING PLAN
FOR INITIAL CHARTER PERIOD

SUMMARY	
Total Revenue	615,000
Total Expenses	608,164
Net Income	6,836
Revenue Per Pupil	
Expenses Per Pupil	
Start-Up Period	
Custom OTHER FINANCING SOURCES	-
TOTAL OTHER FINANCING SOURCES	\$ -
TOTAL REVENUE	\$ 615,000

Description of Assumptions

Catalyst: Bremerton
PROJECTED START-UP BUDGET / OPERATING PLAN
FOR INITIAL CHARTER PERIOD

SUMMARY		Description of Assumptions
Total Revenue	615,000	
Total Expenses	608,164	
Net Income	6,836	
Revenue Per Pupil		
Expenses Per Pupil		
		Start-Up Period
EXPENSES		
ADMINISTRATIVE STAFF PERSONNEL COSTS		
Executive Management	130,000	School Co-Founders Salary
Instructional Management	130,000	School Co-Founders Salary
Deans, Directors & Coordinators	-	
CFO / Director of Finance	60,000	8 months of salary
Operation / Business Manager		
Administrative Staff	26,667	8 months of salary
Other - Administrative	50,000	Community Engagement Coordinator
TOTAL ADMINISTRATIVE STAFF PERSONNEL COSTS	\$ 396,667	
INSTRUCTIONAL PERSONNEL COSTS		
Teachers - Regular	-	
Teachers - SPED	-	
Substitute Teachers	-	
Teaching Assistants	-	
Specialty Teachers	-	
Aides	-	
Therapists & Counselors	-	
Other - Instructional	-	
TOTAL INSTRUCTIONAL PERSONNEL COSTS	\$ -	
NON-INSTRUCTIONAL PERSONNEL COSTS		
Nurse	-	
Librarian	-	
Custodian	-	
Security	-	
Other - Non-Instructional	-	
TOTAL NON-INSTRUCTIONAL PERSONNEL COSTS	\$ -	
TOTAL PERSONNEL EXPENSES	\$ 396,667	
PAYROLL TAXES AND BENEFITS		
Social Security	24,593	
Medicare	5,752	
State Unemployment	5,365	
Worker's Compensation Insurance	7,933	
Custom Other Tax #1	-	
Custom Other Tax #2	-	
Health Insurance	27,250	
Dental Insurance	-	
Vision Insurance	-	
Life Insurance	-	
Retirement Contribution	51,604	
Custom Fringe #1	-	
Custom Fringe #2	-	
TOTAL PAYROLL TAXES AND BENEFITS	\$ 122,497	
TOTAL PERSONNEL, TAX & BENEFIT EXPENSES	\$ 519,164	
CONTRACTED SERVICES		
Accounting / Audit		
Legal	5,000	
Oversight Fee (3%)	-	
Management Company Fee	-	
Nurse Services	-	
Food Service / School Lunch	-	
Payroll Services	-	
Special Ed Services	-	
Titlement Services (i.e. Title I)	-	
TMC contract		
Back Office Services	30,000	
WA Charters Membership	-	
TOTAL CONTRACTED SERVICES	\$ 35,000	

Catalyst: Bremerton
PROJECTED START-UP BUDGET / OPERATING PLAN
FOR INITIAL CHARTER PERIOD

SUMMARY	
Total Revenue	615,000
Total Expenses	608,164
Net Income	6,836
Revenue Per Pupil	
Expenses Per Pupil	

Description of Assumptions

Start-Up Period

SCHOOL OPERATIONS

Board Expenses	1,000
Classroom / Teaching Supplies & Materials	
Special Ed Supplies & Materials	-
Textbooks / Workbooks	-
Supplies & Materials other	-
Equipment / Furniture	-
Telephone	-
Technology	10,000
Student Testing & Assessment	-
Field Trips	-
Transportation (student)	-
Student Services - other	-
Office Expense	8,000
Staff Development	5,000
Staff Recruitment	15,000
Student Recruitment / Marketing	15,000
School Meals / Lunch	-
Travel (Staff)	-
Fundraising	-
Software Licences	-
Student Information System	-
Technology for Staff	-

TOTAL SCHOOL OPERATIONS **\$ 54,000**

FACILITY OPERATION & MAINTENANCE

Insurance	-
Janitorial Services	-
Building and Land Rent / Lease	-
Repairs & Maintenance	-
Equipment / Furniture	-
Security Services	-
Utilities	-
Internet and Website Development	-
Custom Facilities Operations #2	-
Custom Facilities Operations #3	-

TOTAL FACILITY OPERATION & MAINTENANCE **\$ -**

RESERVES / CONTINGENCY **-**

TOTAL EXPENSES **\$ 608,164**

NET OPERATING INCOME (before Depreciation) **\$ 6,836**

DEPRECIATION & AMORTIZATION **-**

NET OPERATING INCOME (including Depreciation) **\$ 6,836**

Catalyst: Bremerton
PROJECTED START-UP BUDGET / OPERATING PLAN FOR INITIAL CHARTER PERIOD

SUMMARY							CHECK vs. Budget (Must Be Zero)	Description of Assumptions
Total Revenue	457,169	19,044	19,044	116,543	1,600	1,600	615,000	-
Total Expenses	331,707	54,291	55,616	55,616	55,616	55,616	608,464	300
Net Income	125,462	(35,247)	(36,572)	60,927	(54,016)	(54,016)	6,536	(300)
Cash Flow Adjustments	-	-	-	-	-	-	-	-
Beginning Cash Balance	-	125,462	90,215	53,643	114,569	60,553	-	-
Ending Cash Balance	125,462	90,215	53,643	114,569	60,553	6,536	6,536	-
	March	April	May	June	July	August	TOTAL	
REVENUE								
1000 - LOCAL TAXES								
1100 - Local Property Tax	-	-	-	-	-	-	-	-
1900 - Other Local Taxes	-	-	-	-	-	-	-	-
Custom LOCAL TAXES	-	-	-	-	-	-	-	-
TOTAL LOCAL TAXES	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-
2000 - LOCAL SUPPORT - NON-TAX								
2200 - Sale Of Goods, Supplies, & Services -	-	-	-	-	-	-	-	-
2500 - Gifts Grants, and Donations (Local)	100,000	-	-	100,000	-	-	200,000	-
NSVF Grant	215,000	-	-	-	-	-	215,000	-
TOTAL LOCAL SUPPORT - NON-TAX	\$ 315,000	\$ -	\$ -	\$ 100,000	\$ -	\$ -	\$ 415,000	-
3000 - STATE REVENUE - GENERAL PURPOSE								
3100 - Apportionment	-	-	-	-	-	-	-	-
3121 - Special Education - General Apportionment	-	-	-	-	-	-	-	-
Custom STATE REVENUE - GENERAL PURPOSE	-	-	-	-	-	-	-	-
TOTAL STATE REVENUE - GENERAL PURPOSE	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-
4000 - STATE REVENUE - SPECIAL PURPOSE								
4121 - Special Education - State	-	-	-	-	-	-	-	-
4155 - Learning Assistance	-	-	-	-	-	-	-	-
4165 - Transitional Bilingual	-	-	-	-	-	-	-	-
4174 - Highly Capable	-	-	-	-	-	-	-	-
4198 - School Food Service	-	-	-	-	-	-	-	-
4199 - Transportation - Operations	-	-	-	-	-	-	-	-
Custom STATE REVENUE - SPECIAL PURPOSE	-	-	-	-	-	-	-	-
TOTAL STATE REVENUE - SPECIAL PURPOSE	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-
5000 - FEDERAL REVENUE - GENERAL PURPOSE								
5200 - General Purpose Direct Fed. Grants -	-	-	-	-	-	-	-	-
Title I	-	-	-	-	-	-	-	-
Title II	-	-	-	-	-	-	-	-
Title III	-	-	-	-	-	-	-	-
IDEA Funding	-	-	-	-	-	-	-	-
CSP	142,169	19,044	19,044	16,543	1,600	1,600	200,000	-
Total 5200 - General Purpose Direct Fed. Grants -	\$ 142,169	\$ 19,044	\$ 19,044	\$ 16,543	\$ 1,600	\$ 1,600	\$ 200,000	-
Custom FEDERAL REVENUE - GENERAL PURPOSE	-	-	-	-	-	-	-	-
TOTAL FEDERAL REVENUE - GENERAL PURPOSE	\$ 142,169	\$ 19,044	\$ 19,044	\$ 16,543	\$ 1,600	\$ 1,600	\$ 200,000	-
6000 - FEDERAL REVENUE - SPECIAL PURPOSE								
6100 - Special Purpose - OSPI Unassigned	-	-	-	-	-	-	-	-
6198 - School Food Services	-	-	-	-	-	-	-	-
Free Breakfast Reimbursement	-	-	-	-	-	-	-	-
Reduced Breakfast Reimbursement	-	-	-	-	-	-	-	-
Paid Breakfast Reimbursement	-	-	-	-	-	-	-	-
Free Lunch Reimbursement	-	-	-	-	-	-	-	-
Reduced Lunch Reimbursement	-	-	-	-	-	-	-	-
Paid Lunch Reimbursement	-	-	-	-	-	-	-	-
Snack Reimbursement	-	-	-	-	-	-	-	-
Total 6198 - School Food Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-
Custom FEDERAL REVENUE - SPECIAL PURPOSE	-	-	-	-	-	-	-	-
TOTAL FEDERAL REVENUE - SPECIAL PURPOSE	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-
7000 - OTHER SCHOOL DISTRICTS								
7100 - Program Participation, Unassigned	-	-	-	-	-	-	-	-
Custom OTHER SCHOOL DISTRICTS	-	-	-	-	-	-	-	-
TOTAL OTHER SCHOOL DISTRICTS	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-
8000 - OTHER ENTITIES								
8100 - Governmental Entities	-	-	-	-	-	-	-	-
8200 - Private Foundations	-	-	-	-	-	-	-	-
8500 - Educational Service Districts	-	-	-	-	-	-	-	-
CMO Fee / Salary Offset	-	-	-	-	-	-	-	-
TOTAL OTHER ENTITIES	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-
9000 - OTHER FINANCING SOURCES								
9500 - Long-Term Financing	-	-	-	-	-	-	-	-
9900 - Transfers	-	-	-	-	-	-	-	-
Custom OTHER FINANCING SOURCES	-	-	-	-	-	-	-	-

Catalyst: Bremerton
PROJECTED START-UP BUDGET / OPERATING PLAN FOR INITIAL CHARTER PERIOD

SUMMARY									CHECK vs. Budget (Must Be Zero)	Description of Assumptions
Total Revenue	457,169	19,044	19,044	116,543	1,600	1,600	615,000		-	
Total Expenses	331,707	54,291	55,616	55,616	55,616	55,616	608,464		300	
Net Income	125,462	(35,247)	(36,572)	60,927	(54,016)	(54,016)	6,536		(300)	
Cash Flow Adjustments	-	-	-	-	-	-	-			
Beginning Cash Balance	-	125,462	90,215	53,643	114,569	60,553	-			
Ending Cash Balance	125,462	90,215	53,643	114,569	60,553	6,536	6,536			
		March	April	May	June	July	August	TOTAL		
TOTAL OTHER FINANCING SOURCES	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	
TOTAL REVENUE	\$ 457,169	\$ 19,044	\$ 19,044	\$ 116,543	\$ 1,600	\$ 1,600	\$ 615,000		-	

Catalyst: Bremerton

CHECK vs. Budget
(Must Be Zero)

Description of Assumptions

Catalyst: Bremerton
PROJECTED START-UP BUDGET / OPERATING PLAN FOR INITIAL CHARTER PERIOD

SUMMARY								CHECK vs. Budget (Must Be Zero)	Description of Assumptions
Total Revenue	457,169	19,044	19,044	116,543	1,600	1,600	615,000	-	
Total Expenses	331,707	54,291	55,616	55,616	55,616	55,616	608,464	300	
Net Income	125,462	(35,247)	(36,572)	60,927	(54,016)	(54,016)	6,536	(300)	
Cash Flow Adjustments	-	-	-	-	-	-	-	-	
Beginning Cash Balance	-	125,462	90,215	53,643	114,569	60,553	-	-	
Ending Cash Balance	125,462	90,215	53,643	114,569	60,553	6,536	6,536	-	
	March	April	May	June	July	August	TOTAL		
SCHOOL OPERATIONS									
Board Expenses	583.33	83.33	83.33	83.33	83.33	83.33	1,000	-	
Classroom / Teaching Supplies & Materials	-	-	-	-	-	-	-	-	
Special Ed Supplies & Materials	-	-	-	-	-	-	-	-	
Textbooks / Workbooks	-	-	-	-	-	-	-	-	
Supplies & Materials other	-	-	-	-	-	-	-	-	
Equipment / Furniture	-	-	-	-	-	-	-	-	
Telephone	-	-	-	-	-	-	-	-	
Technology	5,833.33	833.33	833.33	833.33	833.33	833.33	10,000	-	
Student Testing & Assessment	-	-	-	-	-	-	-	-	
Field Trips	-	-	-	-	-	-	-	-	
Transportation (student)	-	-	-	-	-	-	-	-	
Student Services - other	-	-	-	-	-	-	-	-	
Office Expense	4,666.67	666.67	666.67	666.67	666.67	666.67	8,000	-	
Staff Development	-	-	1,325	1,325	1,325	1,325	5,300	300	
Staff Recruitment	8,750.00	1,250.00	1,250.00	1,250.00	1,250.00	1,250.00	15,000	-	
Student Recruitment / Marketing	8,750.00	1,250.00	1,250.00	1,250.00	1,250.00	1,250.00	15,000	-	
School Meals / Lunch	-	-	-	-	-	-	-	-	
Travel (Staff)	-	-	-	-	-	-	-	-	
Fundraising	-	-	-	-	-	-	-	-	
Software Licences	-	-	-	-	-	-	-	-	
Student Information System	-	-	-	-	-	-	-	-	
Technology for Staff	-	-	-	-	-	-	-	-	
TOTAL SCHOOL OPERATIONS	\$ 28,583	\$ 4,083	\$ 5,408	\$ 5,408	\$ 5,408	\$ 5,408	\$ 54,300	300	
FACILITY OPERATION & MAINTENANCE									
Insurance	-	-	-	-	-	-	-	-	
Janitorial Services	-	-	-	-	-	-	-	-	
Building and Land Rent / Lease	-	-	-	-	-	-	-	-	
Repairs & Maintenance	-	-	-	-	-	-	-	-	
Equipment / Furniture	-	-	-	-	-	-	-	-	
Security Services	-	-	-	-	-	-	-	-	
Utilities	-	-	-	-	-	-	-	-	
Internet and Website Development	-	-	-	-	-	-	-	-	
Custom Facilities Operations #2	-	-	-	-	-	-	-	-	
Custom Facilities Operations #3	-	-	-	-	-	-	-	-	
TOTAL FACILITY OPERATION & MAINTENANCE	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	
RESERVES / CONTINGENCY									
	-	-	-	-	-	-	-	-	
TOTAL EXPENSES	\$ 331,707	\$ 54,291	\$ 55,616	\$ 55,616	\$ 55,616	\$ 55,616	\$ 608,464	300	
NET OPERATING INCOME (before Depreciation)	\$ 125,462	\$ (35,247)	\$ (36,572)	\$ 60,927	\$ (54,016)	\$ (54,016)	\$ 6,536	(300)	
DEPRECIATION & AMORTIZATION	-	-	-	-	-	-	-	-	
NET OPERATING INCOME (including Depreciation)	\$ 125,462	\$ (35,247)	\$ (36,572)	\$ 60,927	\$ (54,016)	\$ (54,016)	\$ 6,536	(300)	

YEAR ONE PROJECTED BUDGET / OPERATING PLAN FOR INITIAL CHARTER PERIOD

Description of Assumptions

1000 - LOCAL TAXES

TOTAL LOCAL TAXES**TOTAL LOCAL SUPPORT - NON-TAX**TOTAL STATE REVENUE - GENERAL PURPOSETOTAL STATE REVENUE - SPECIAL PURPOSE

Title II

Paid Lunch ReimbursementTOTAL OTHER SCHOOL DISTRICTS**TOTAL OTHER ENTITIES****9000 - OTHER FINANCING SOURCES**

9900 - Transfers
Custom OTHER FINANCING SOURCES

Catalyst: Bremerton
YEAR ONE PROJECTED BUDGET / OPERATING PLAN FOR INITIAL CHARTER PERIOD

SUMMARY														CHECK vs. Budget (Must Be Zero)		Description of Assumptions
Total Revenue	758,904	268,617	190,044	279,544	279,544	388,617	279,544	279,544	270,044	202,830	305,115	294,188	-	3,796,534	-	
Total Expenses	429,978	302,290	299,605	305,290	287,707	287,707	290,707	287,707	285,022	288,406	283,041	283,041	-	3,630,503	-	
Net Income	328,926	(33,673)	(109,561)	(25,746)	(8,164)	100,910	(11,164)	(8,164)	(14,978)	(85,576)	22,074	11,147	-	166,031	-	
Cash Flow Adjustments	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Beginning Cash Balance	6,536	335,463	301,789	192,228	166,482	158,318	259,228	248,064	239,901	224,922	139,346	161,420	172,567	6,536	-	
Ending Cash Balance	335,463	301,789	192,228	166,482	158,318	259,228	248,064	239,901	224,922	139,346	161,420	172,567	172,567	172,567	-	
	September	October	November	December	January	February	March	April	May	June	July	August	September + Subsequent Items	TOTAL		
TOTAL OTHER FINANCING SOURCES	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	
TOTAL REVENUE	\$ 758,904	\$ 268,617	\$ 190,044	\$ 279,544	\$ 279,544	\$ 388,617	\$ 279,544	\$ 279,544	\$ 270,044	\$ 202,830	\$ 305,115	\$ 294,188	\$ -	\$ 3,796,534	-	

Catalyst: Bremerton
YEAR ONE PROJECTED BUDGET / OPERATING PLAN FOR INITIAL CHARTER PERIOD

SUMMARY														
Total Revenue	758,904	268,617	190,044	279,544	279,544	388,617	279,544	279,544	270,044	202,830	305,115	294,188	-	3,796,534
Total Expenses	429,978	302,290	299,605	305,290	287,707	287,707	290,707	287,707	285,022	288,406	283,041	283,041	-	3,630,503
Net Income	328,926	(33,673)	(109,561)	(25,746)	(8,164)	100,910	(11,164)	(8,164)	(14,978)	(85,576)	22,074	11,147	-	166,031
Cash Flow Adjustments	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Beginning Cash Balance	6,536	335,463	301,789	192,228	166,482	158,318	259,228	248,064	239,901	224,922	139,346	161,420	172,567	6,536
Ending Cash Balance	335,463	301,789	192,228	166,482	158,318	259,228	248,064	239,901	224,922	139,346	161,420	172,567	172,567	172,567
	September	October	November	December	January	February	March	April	May	June	July	August	September + Subsequent Items	TOTAL

CHECK vs. Budget
(Must Be Zero)

Description of Assumptions

EXPENSES

ADMINISTRATIVE STAFF PERSONNEL COSTS														
Executive Management	10,833	10,833	10,833	10,833	10,833	10,833	10,833	10,833	10,833	10,833	10,833	10,833	-	130,000
Instructional Management	10,833	10,833	10,833	10,833	10,833	10,833	10,833	10,833	10,833	10,833	10,833	10,833	-	130,000
Deans, Directors & Coordinators	-	-	-	-	-	-	-	-	-	-	-	-	-	-
CFO / Director of Finance	7,500	7,500	7,500	7,500	7,500	7,500	7,500	7,500	7,500	7,500	7,500	7,500	-	90,000
Operation / Business Manager	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Administrative Staff	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other - Administrative	7,500	7,500	7,500	7,500	7,500	7,500	7,500	7,500	7,500	7,500	7,500	7,500	-	90,000
TOTAL ADMINISTRATIVE STAFF PERSONNEL COSTS	\$ 36,667	\$ 36,667	\$ 36,667	\$ 36,667	\$ 36,667	\$ 36,667	\$ 36,667	\$ 36,667	\$ 36,667	\$ 36,667	\$ 36,667	\$ 36,667	\$ -	\$ 440,000
INSTRUCTIONAL PERSONNEL COSTS														
Teachers - Regular	59,667	59,667	59,667	59,667	59,667	59,667	59,667	59,667	59,667	59,667	59,667	59,667	-	716,000
Teachers - SPED	5,833	5,833	5,833	5,833	5,833	5,833	5,833	5,833	5,833	5,833	5,833	5,833	-	70,000
Substitute Teachers	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Teaching Assistants	20,000	20,000	20,000	20,000	20,000	20,000	20,000	20,000	20,000	20,000	20,000	20,000	-	240,000
Specialty Teachers	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Aides	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Therapists & Counselors	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other - Instructional	-	-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL INSTRUCTIONAL PERSONNEL COSTS	\$ 85,500	\$ 85,500	\$ 85,500	\$ 85,500	\$ 85,500	\$ 85,500	\$ 85,500	\$ 85,500	\$ 85,500	\$ 85,500	\$ 85,500	\$ 85,500	\$ -	\$ 1,026,000
NON-INSTRUCTIONAL PERSONNEL COSTS														
Nurse	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Librarian	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Custodian	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Security	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other - Non-Instructional	-	-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL NON-INSTRUCTIONAL PERSONNEL COSTS	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL PERSONNEL EXPENSES	\$ 122,167	\$ 122,167	\$ 122,167	\$ 122,167	\$ 122,167	\$ 122,167	\$ 122,167	\$ 122,167	\$ 122,167	\$ 122,167	\$ 122,167	\$ 122,167	\$ -	\$ 1,466,000
PAYROLL TAXES AND BENEFITS														
Social Security	7,574	7,574	7,574	7,574	7,574	7,574	7,574	7,574	7,574	7,574	7,574	7,574	-	90,892
Medicare	1,771	1,771	1,771	1,771	1,771	1,771	1,771	1,771	1,771	1,771	1,771	1,771	-	21,257
State Unemployment	2,223	2,223	2,223	2,223	2,223	2,223	2,223	2,223	2,223	2,223	2,223	2,223	-	26,681
Worker's Compensation Insurance	2,443	2,443	2,443	2,443	2,443	2,443	2,443	2,443	2,443	2,443	2,443	2,443	-	29,320
Custom Other Tax #1	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Custom Other Tax #2	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Health Insurance	11,862	11,862	11,862	11,862	11,862	11,862	11,862	11,862	11,862	11,862	11,862	11,862	-	142,349
Dental Insurance	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Vision Insurance	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Life Insurance	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Retirement Contribution	16,590	16,590	16,590	16,590	16,590	16,590	16,590	16,590	16,590	16,590	16,590	16,590	-	199,083
Custom Fringe #1	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Custom Fringe #2	-	-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL PAYROLL TAXES AND BENEFITS	\$ 42,465	\$ 42,465	\$ 42,465	\$ 42,465	\$ 42,465	\$ 42,465	\$ 42,465	\$ 42,465	\$ 42,465	\$ 42,465	\$ 42,465	\$ 42,465	\$ -	\$ 509,582
TOTAL PERSONNEL, TAX & BENEFIT EXPENSES	\$ 164,632	\$ 164,632	\$ 164,632	\$ 164,632	\$ 164,632	\$ 164,632	\$ 164,632	\$ 164,632	\$ 164,632	\$ 164,632	\$ 164,632	\$ 164,632	\$ -	\$ 1,975,582
CONTRACTED SERVICES														
Accounting / Audit	-	-	-	-	2,833	2,833	2,833	2,833	2,833	2,833	-	-	-	17,000
Legal	833	833	833	833	833	833	833	833	833	833	833	833	-	10,000
Oversight Fee (3%)	6,904	6,904	4,219	6,904	6,904	6,904	6,904	6,904	4,219	4,603	7,671	7,671	-	76,714
Management Company Fee	28,762	28,762	28,762	28,762	28,762	28,762	28,762	28,762	28,762	28,762	28,762	28,762	-	345,139
Nurse Services	417	417	417	417	417	417	417	417	417	417	417	417	-	5,000
Food Service / School Lunch	1,400	1,400	1,400	1,400	1,400	1,400	1,400	1,400	1,400	1,400	1,400	1,400	-	16,800
Payroll Services	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Special Ed Services	12,500	12,500	12,500	12,500	12,500	12,500	12,500	12,500	12,500	12,500	12,500	12,500	-	150,000
Titlement Services (i.e. Title I)	-	-	-	-	-	-	-	-	-	-	-	-	-	-
TMC contract	3,000	-	-	3,000	-	-	3,000	-	3,000	-	-	-	-	12,000
Back Office Services	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	-	60,000
WA Charters Membership	1,120	-	-	-	-	-	-	-	-	-	-	-	-	1,120
TOTAL CONTRACTED SERVICES	\$ 59,936	\$ 55,816	\$ 53,131	\$ 58,816	\$ 58,649	\$ 58,649	\$ 61,649	\$ 58,649	\$ 55,964	\$ 59,348	\$ 56,583	\$ 56,583	\$ -	\$ 693,774

Catalyst: Bremerton
YEAR ONE PROJECTED BUDGET / OPERATING PLAN FOR INITIAL CHARTER PERIOD

SUMMARY														CHECK vs. Budget (Must Be Zero)	Description of Assumptions
Total Revenue	758,904	268,617	190,044	279,544	279,544	388,617	279,544	279,544	270,044	202,830	305,115	294,188	-	3,796,534	-
Total Expenses	429,978	302,290	299,605	305,290	287,707	287,707	290,707	287,707	285,022	288,406	283,041	283,041	-	3,630,503	-
Net Income	328,926	(33,673)	(109,561)	(25,746)	(8,164)	100,910	(11,164)	(8,164)	(14,978)	(85,576)	22,074	11,147	-	166,031	-
Cash Flow Adjustments	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Beginning Cash Balance	6,536	335,463	301,789	192,228	166,482	158,318	259,228	248,064	239,901	224,922	139,346	161,420	172,567	6,536	-
Ending Cash Balance	335,463	301,789	192,228	166,482	158,318	259,228	248,064	239,901	224,922	139,346	161,420	172,567	172,567	172,567	-
	September	October	November	December	January	February	March	April	May	June	July	August	September + Subsequent Items	TOTAL	
SCHOOL OPERATIONS															
Board Expenses	208	208	208	208	208	208	208	208	208	208	208	208	-	2,500	-
Classroom / Teaching Supplies & Materials	17,416	17,416	17,416	17,416	-	-	-	-	-	-	-	-	-	69,664	-
Special Ed Supplies & Materials	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Textbooks / Workbooks	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Supplies & Materials other	1,568	-	-	-	-	-	-	-	-	-	-	-	-	1,568	-
Equipment / Furniture	49,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	-	-	-	60,000	-
Telephone	187	187	187	187	187	187	187	187	187	187	187	187	-	2,240	-
Technology	5,118	5,118	5,118	5,118	5,118	5,118	5,118	5,118	5,118	5,118	5,118	5,118	-	61,420	-
Student Testing & Assessment	560	560	560	560	560	560	560	560	560	560	560	560	-	6,720	-
Field Trips	467	467	467	467	467	467	467	467	467	467	467	467	-	5,600	-
Transportation (student)	6,873	6,873	6,873	6,873	6,873	6,873	6,873	6,873	6,873	6,873	6,873	6,873	-	82,477	-
Student Services - other	131	131	131	131	131	131	131	131	131	131	131	131	-	1,568	-
Office Expense	8,200	200	200	200	200	200	200	200	200	200	-	-	-	10,000	-
Staff Development	417	417	417	417	417	417	417	417	417	417	417	417	-	5,000	-
Staff Recruitment	167	167	167	167	167	167	167	167	167	167	167	167	-	2,000	-
Student Recruitment / Marketing	1,083	1,083	1,083	1,083	1,083	1,083	1,083	1,083	1,083	1,083	1,083	1,083	-	13,000	-
School Meals / Lunch	9,085	9,085	9,085	9,085	9,085	9,085	9,085	9,085	9,085	9,085	9,085	9,085	-	109,025	-
Travel (Staff)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Fundraising	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Software Licences	22,960	560	560	560	560	560	560	560	560	560	-	-	-	28,000	-
Student Information System	643	643	643	643	643	643	643	643	643	643	643	643	-	7,710	-
Technology for Staff	26,240	640	640	640	640	640	640	640	640	640	-	-	-	32,000	-
TOTAL SCHOOL OPERATIONS	\$ 150,522	\$ 44,954	\$ 44,954	\$ 44,954	\$ 27,538	\$ 27,538	\$ 27,538	\$ 27,538	\$ 27,538	\$ 27,538	\$ 24,938	\$ 24,938	\$ -	\$ 500,492	-
FACILITY OPERATION & MAINTENANCE															
Insurance	2,221	2,221	2,221	2,221	2,221	2,221	2,221	2,221	2,221	2,221	2,221	2,221	-	26,656	-
Janitorial Services	4,667	4,667	4,667	4,667	4,667	4,667	4,667	4,667	4,667	4,667	4,667	4,667	-	56,000	-
Building and Land Rent / Lease	22,917	22,917	22,917	22,917	22,917	22,917	22,917	22,917	22,917	22,917	22,917	22,917	-	275,000	-
Repairs & Maintenance	1,667	1,667	1,667	1,667	1,667	1,667	1,667	1,667	1,667	1,667	1,667	1,667	-	20,000	-
Equipment / Furniture	18,000	-	-	-	-	-	-	-	-	-	-	-	-	18,000	-
Security Services	833	833	833	833	833	833	833	833	833	833	833	833	-	10,000	-
Utilities	3,333	3,333	3,333	3,333	3,333	3,333	3,333	3,333	3,333	3,333	3,333	3,333	-	40,000	-
Internet and Website Development	1,250	1,250	1,250	1,250	1,250	1,250	1,250	1,250	1,250	1,250	1,250	1,250	-	15,000	-
Custom Facilities Operations #2	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Custom Facilities Operations #3	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL FACILITY OPERATION & MAINTENANCE	\$ 54,888	\$ 36,888	\$ 36,888	\$ 36,888	\$ 36,888	\$ 36,888	\$ 36,888	\$ 36,888	\$ 36,888	\$ 36,888	\$ 36,888	\$ 36,888	\$ -	\$ 460,656	-
RESERVES / CONTINGENCY	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL EXPENSES	\$ 429,978	\$ 302,290	\$ 299,605	\$ 305,290	\$ 287,707	\$ 287,707	\$ 290,707	\$ 287,707	\$ 285,022	\$ 288,406	\$ 283,041	\$ 283,041	\$ -	\$ 3,630,503	-
NET OPERATING INCOME (before Depreciation)	\$ 328,926	\$ (33,673)	\$ (109,561)	\$ (25,746)	\$ (8,164)	\$ 100,910	\$ (11,164)	\$ (8,164)	\$ (14,978)	\$ (85,576)	\$ 22,074	\$ 11,147	\$ -	\$ 166,031	-
DEPRECIATION & AMORTIZATION	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
NET OPERATING INCOME (including Depreciation)	\$ 328,926	\$ (33,673)	\$ (109,561)	\$ (25,746)	\$ (8,164)	\$ 100,910	\$ (11,164)	\$ (8,164)	\$ (14,978)	\$ (85,576)	\$ 22,074	\$ 11,147	\$ -	\$ 166,031	-

SCHOOL NAME

School Logo

Financial Policies and Procedures Manual

DRAFT

Month

XXXX

This document will describe the policies and procedures for the accounting and administrative functions conducted by **SCHOOL**. Management may amend this manual as needed. The Board of Trustees is to review the manual every year.

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INTRODUCTION

SCHOOL is committed to developing and maintaining financial policies and procedures that ensure sound internal controls, fiscal responsibility and accountability in accordance with the Generally Accepted Accounting Principles (GAAP), and rules and regulations of the Financial Accounting Standards Board (FASB). **SCHOOL** will follow all the relevant laws and regulations that govern the Charter Schools within the State of Washington. As a nonprofit organization, **SCHOOL** is entrusted with funds granted by government agencies, private foundations and individual contributors and it will adhere to the highest of standards of accounting.

Clear financial policies and procedures will enable the school to meet its financial needs and obligations, ensure long-term financial stability and viability, and protect its tangible assets and reputation.

Financial Policies

1. **SCHOOL** shall comply with the laws, rules, and regulations applicable to it in regard to financial matters and with the terms of the contract by which it is bound.
2. Control procedures shall be in place to ensure the security of the organization's assets.
3. Timely and accurate financial information shall be produced to fulfill all reporting requirements and management needs.

Financial Leadership and Management

The financial management team of **SCHOOL** consists of:

- Board of Trustees,
- Finance Committee,
- Treasurer of the Board of Trustees,
- Executive Director,
- Director of Operations,
 - Operations Manager,
- Office Manager, and
- Financial Consultant

The day-to-day fiscal responsibilities of **SCHOOL** are assigned to its fiscal staff. However, ultimate fiduciary responsibility for the overall management of the organization lies with the Board of Trustees.

The Board of Trustees will meet monthly to ensure that its fiduciary duty is maintained. **SCHOOL** will establish a Finance Committee by the first full Board meeting. This committee will be responsible for selecting an audit firm on an annual basis, reviewing the financial policies and procedures manual on an annual basis, approving the annual budget, and working with the school's finance team to review the monthly financial statements.

INCLUDE LANGUAGE ABOUT YOUR AUTHORIZER'S REQUIREMENTS HERE.

The Finance Committee of the Board of Trustees shall be responsible for the primary Board-level oversight of school financial matters, as defined by the Board. The Director of Operations and Financial Consultant will have the primary responsibility of executing all financial matters. All members of the fiscal management team will work together to make certain that all financial matters of the organization are addressed with care, integrity, and in the best interest of SCHOOL.

The Executive Director is responsible for administering the school's adopted policies and ensuring compliance with procedures that have been approved by the Board of Trustees. Exceptions to written policies may only be made with the prior approval of the Finance Committee. Changes or amendments to these policies shall be conducted by the Finance Committee and approved by the Board of Trustees every year.

Any violation of these policies and procedures is considered to be cause for termination or removal and, depending upon the nature of the infraction, civil and/or criminal prosecution.

DRAFT

INTERNAL CONTROL STRUCTURE

Background

This manual describes the policies and procedures of **SCHOOL**. The policies are designed to safeguard the assets of the school, facilitate compliance with applicable law, and produce timely and accurate financial information in accordance with the Generally Accepted Accounting Principles (GAAP), and rules and regulations of the Financial Accounting Standards Board (FASB). It is the responsibility of the leadership team to safeguard the school's assets, which include cash, cash equivalents, and fixed assets. The contents of this chapter will demonstrate the internal controls that will be/have been implemented to assure assets are safeguarded appropriately.

The internal control structure is composed of four basic elements, described in detail below.

1. Internal Control Environment

The internal control environment reflects the importance **SCHOOL** places on internal controls as part of its day-to-day activities. Factors that impact the internal control environment can include management and Board philosophy; organizational structure; ways of assigning authority and responsibility; methods of management and control; personnel policies and practices; and external influences such as significant donor expectations.

2. Accounting System

SCHOOL has established an accounting system comprised of the methods and records used to identify, assemble, classify, record and report accounting transactions. The methods are set up to: (1) identify and record all of the organization's transactions; (2) describe the transactions in enough detail to allow classification for financial reporting, and (3) indicate the time period in which transactions occurred in order to record them in the proper accounting period. The fiscal year is from July 1st to June 30th. The school's audited financial statements must be approved by the Board of Trustees and provided to the appropriate oversight entity according to all applicable requirements. Furthermore, the school's budgets for the following fiscal year must be drafted for Board review and approved **prior to** the end of the current fiscal year. The budget may later be revised and approved as necessary.

3. Internal Control Procedures

SCHOOL has adopted a number of internal financial controls. These procedures are set up to strengthen **SCHOOL** internal control structure in order to safeguard the organization's assets. The internal financial controls consist of the following:

Segregation of Duties: A hierarchical structure of authority and responsibility has been developed at **SCHOOL**. Tasks are divided and allocated to guard against one individual having the ability to make an accounting error (either knowingly or unknowingly). This protects the school from any potential fraud or misappropriation of funds. In situations where there are an insufficient number of employees to achieve this because of budget constraints, a compensating control has been created at the school.

Restricted Access: Physical access to valuable and moveable assets is restricted to authorized personnel.

Document Control: In order to ensure that all documents are captured by the accounting system, all documents must be initialed and dated when recorded and then filed appropriately.

Records Retention: To provide an accurate and auditable record of all financial transactions, the school's books, records, and accounts are maintained in conformity with generally accepted accounting principles as required by Washington law, applicable to charter schools. Records will be maintained for the periods sufficient to satisfy IRS regulations, federal grant requirements, OMB A133 audit requirements, if applicable, and other legal needs as may be determined. Record retention requirements are reviewed annually with legal counsel and independent auditors to determine any necessary changes.

Processing Controls: These are designed to identify any errors *before* they are posted to the general ledger. Common processing controls are the following: (1) Source document matching; (2) Clerical accuracy of documents; and (3) General ledger account code checking.

Reconciliation Controls: These are designed to identify any errors *after* transactions have been posted and the general ledger has been run. The process involves reconciling selected general ledger control accounts to subsidiary ledgers. Reconciliation is completed by the Financial Consultant and approved by the school's Executive Director.

Annual Independent Audit: **SCHOOL'S** financial statements are audited annually by an independent audit firm selected by the Board of Trustees on the recommendation of the Finance Committee.

Security of Financial Data: The school's accounting software is accessible only to the

Executive Director, Director of Operations, and the Financial Consultant. Individual ID codes and passwords are in place for every user and limit their access and functionality depending on their role within the school. All other hard copies of financial data, when not in use, will be secured in a closet or cabinet at the school.

Risk Assessment: This is designed to identify, analyze, and manage risk relevant to the preparation of accurate financial statements. It includes mitigating risks involving internal and/or external factors that might adversely affect the school's ability to properly record, process, summarize and report financial data.

4.The Accounting Cycle

The accounting cycle is designed to accurately process, record, summarize, and report transactions of **SCHOOL. SCHOOL** will maintain their accounting records and related financial reports on the accrual basis of accounting. Under the accrual basis of accounting, revenues are recognized when earned and expenses are recognized when services are incurred or goods are received.

The component bookkeeping cycles fall into one of five primary functions:

1) Revenue, Accounts Receivable and Cash Receipts

Key tasks in this area include:

- Processing cash receipts
- Making deposits
- Recording cash receipts in the general ledger and subsidiary records
- Performing month-end reconciliation procedures
- Processing general ledger integration for private donations/revenue
- Processing wire transfers into school accounts

2) Purchases, Accounts Payable and Cash Disbursements

Key tasks in this area include:

- Authorizing the procurement of goods and/or services
- Processing purchases (credit card, check, reimbursement)
- Processing invoices
- Issuing checks
- Recording checks in the general ledger and in cash disbursement journals
- Performing month-end reconciliation procedures
- Year-end reporting: Preparing 1099 forms
- Processing wire transfers out of school accounts

3) Payroll

PAYROLL PROVIDER, an outside service provider, will perform the payroll process. Their responsibilities include calculating appropriate amounts for taxes to be remitted to the Federal, State and City government agencies and voluntary and/or statutory deductions that may or may not require remittance to retirement plan trustees, child support agencies, etc.

Key tasks in this area include:

- Obtaining and gathering payroll information
- Preparing payroll checks and depositing payroll taxes
- Submitting information to **PAYROLL PROVIDER** for processing
- Performing quarterly reconciliation
- Preparing quarterly payroll tax returns
- Preparing W-2s, the W-3, and other annual payroll tax returns

4) General Ledger and Financial Statements

Key tasks in this area include:

- Preparing monthly journal entries
- Reconciling bank accounts and other general ledger accounts
- Reviewing general ledger activity and posting adjusted journal entries
- Producing the financial statements
- Producing the annual budget

The general ledger process consists of posting the period's transactions to **ACCOUNTING SOFTWARE** (the accounting software), which produces the financial statements. The Financial Consultant will reconcile bank and credit card accounts, enter payroll, review the general ledger and prepare for the annual audit.

The Executive Director presents monthly statements to the Board of Trustees at each board meeting. The required statements are outlined in the following section.

The Executive Director is responsible for creating and updating 5-year budget projections for the school. In addition, the Executive Director, in consultation with the Director of Operations and the Financial Consultant, will prepare the annual operating budget of income and expenses and the capital budget for the school. These budgets and the 5-year projection are reviewed and approved annually, first by the Executive Director, then by the Finance Committee of the Board and finally by the school's Board of Trustees and modified as necessary, with approval by the last day of the closing fiscal year. This process is described below.

5) Budgets and Financial Reporting

Budgets

Budgets are created per program annually and updated semi-annually based on

actual expenditures and programmatic changes that occur during the year. Creation of the annual operating budget and capital budget is an iterative process led by the Executive Director, but requires input from the Director of Operations and the Financial Consultant. This input is necessary to ensure enrollment is accurately represented per the charter agreement, and to make certain the staff can properly support the proposed number of enrolled students. Critical school program expenses should be represented in the budgets to ensure reality is properly reflected. Historical information is used when available and applicable. The iterative process is repeated until the overall budget fairly represents the revenues and expenses for the operating budget as well as the cash requirements for capital expenditures under the capital budget.

Once complete, the Executive Director presents the overall budget to the Finance Committee for review. If/when the Committee is satisfied, the budget is then presented to the entire Board for a vote of approval. The budget must be approved and passed by the June 30th before the start of the new fiscal year. Once approved, the implementation of, and accountability for, the budget is the sole responsibility of the Executive Director.

After approval, the Financial Consultant uploads the budget into the accounting system. This budget is then used to run monthly budget vs. actual expense reports that are shared with the Executive Director. Differences of more than \$5,000.00 or 15%, whichever is less, are described in the notes section. The Executive Director is responsible for making sure that significant differences are thoroughly researched and ultimately identified as either permanent or temporary variances. In addition, the Executive Director ensures the Financial Consultant produces contingency budgets with extreme issues.

From a day-to-day operational standpoint, the Executive Director may work with the Treasurer of the Board of Trustees or the Chairperson of the Board of Trustees to resolve questions or issues related to the budget.

Financial Reporting

One week before each Board meeting, the following will be sent to the Finance Committee for review: (1) the budget vs. actual report for the operating budget; (2) the budget vs. actual report for the capital budget; (3) the balance sheet; and (4) the enrollment budget vs. actual report per grade for General Education and Special Education students. The Treasurer of the Board of Trustees will present these reports to the entire Board at each meeting. The Finance Committee may also request cash flow projections through the end of the fiscal year to identify the months that cash flow may run negative.

In addition, monthly budget vs. actual reports for the operating budget and capital budget will be produced by the Financial Consultant for the Executive Director by

the 21st of each month.

At the end of the year, the following key financial statements are produced:

- 1) Balance Sheet
- 2) Income Statement
- 3) Statement of Cash Flows
- 4) Statement of Functional Expenses

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PROCESSING CASH RECEIPTS AND REVENUE

Background

SCHOOL records revenue on the accrual basis of accounting, consistent with generally accepted accounting principles.

SCHOOL receives revenues from the following primary sources:

- Federal Government
- State Government
- City Government
- Corporations
- Foundations
- Individuals

If total federal support for the fiscal year should exceed \$500,000, an additional audit under the guidance of OMB Circular A-133 will be conducted.

Processing and Recording Cash Receipts

The Financial Consultant is responsible for recording cash receipts as well as various other functions.

The Office Manager sorts and delivers all mail. Any mail addressed to a specific staff member should be stamped as “Received” with the date, and transferred, unopened, to the addressee. Any mail addressed generally to the school that is not sent by a credit card company or bank may be opened by the Office Manager or Executive Director. All documents contained within should be stamped as “Received” with the date and initials of the person who opened

the mail, and transferred to the most appropriate individual. In the case of mail sent by a credit card company or bank, the unopened envelope should be stamped as received by the Office Manager with the date. The envelope should then be transferred immediately to the Board Treasurer, or held in a locked, secure location until the Board Treasurer is on site. Once the Board Treasurer receives the envelope, s/he should open and review the contents. Any credit card or bank statements must be marked "Reviewed by" (with initials and date) and "Approved by" (with signature). The credit card or bank statement should then be transferred immediately to the Financial Consultant for review, payment, and filing.

The Office Manager may open mail that appears to contain a check and is addressed generally to the school. Once opened by the Office Manager, all checks must be stamped immediately in the designated endorsement area with "For Deposit Only" and the appropriate bank account number and the name of the school. The receipt of the check must be logged in the Cash Receipts Log, maintained as an ongoing Excel file. The Excel file will be emailed to the Financial Consultant and Executive Director on the last day of each month. The Financial Consultant will reconcile the Excel Cash Receipts Log with the Cash Receipts and Transfers Binder to ensure that all check receipts have been accounted for. The check should then be copied. Any correspondence accompanying the check should also be retained. The check, check copy, and any accompanying documents should be transferred in a secure manner to the Financial Consultant. The above tasks should not be completed by anyone who has direct use of the accounting system.

The Financial Consultant will staple the photocopy of the check and all correspondence (check copy on top) together and file the packet into the Cash Receipts and Transfers Binder, sorted by bank account number and in date order.

When a donation is received, a pre-numbered contribution acknowledgement letter will be drafted by the Office Manager, signed by the Executive Director, and sent to the donor by the Office Manager.

Whenever reasonably possible, the Financial Consultant will deposit all checks on the day received. At the latest, checks must be deposited no later than the next banking day. Checks that cannot be deposited immediately will be placed in a locked location. Before depositing a check, the Financial Consultant will prepare a deposit slip, copy it, and staple this to the copied check. When deposited, a deposit receipt with bank-endorsed proof of deposit will be obtained for each check.

Deposits may be recorded either as invoices or as general ledger entries. After the check has been deposited, the Financial Consultant records the receipt of funds in the accounting system, organized by check number, date and name. If an invoice has already been created, then the deposit will be applied against the outstanding invoice(s). If not, a sales invoice is created, recognizing the revenue in the correct month(s). If the cash is not yet earned, it will be applied against the deferred revenues/unearned income general ledger account.

The Financial Consultant prints a Cash Receipts Journal to show the transaction as posted in the accounting system. This (or a document showing an invoice has been paid) is attached to the front of the copy of the check, copy of deposit slip, deposit receipt with bank-endorsed proof of deposit, and any correspondence that arrived with the check. Together, these documents comprise the Cash Receipts Packet for the respective transaction, with the Cash Receipts Journal on top. The Cash Receipts Packet is sent to the Executive Director for approval. The Executive Director verifies the

PAYROLL SOFTWARE entry reflects the same data as the copied check and proof of deposit, and initials and dates all documents to indicate approval. Once signed, the Financial Consultant files the Cash Receipts Packet in the Cash Receipts and Transfers Binder, separated by bank account and in date order. All cash receipts and authorized transfers between accounts starting on **July 1st** and ending on **June 30th** will be maintained in each fiscal year's Cash Receipts and Transfers Binder.

Processing and Recording Revenue

Typically, grants received will be accompanied by specific agreements that explicitly or implicitly restrict their use and which impose unique reporting requirements – financial as well as performance. **SCHOOL's** accounting and documentation system must be such that it is capable of meeting the individual requirements imposed by such grant agreements. Job codes and/or class codes will be attached to applicable expenses and assets so that associated grant revenues may be earned on an accrual basis.

Inasmuch as the quality of grant agreements impacts its financial strength, **SCHOOL** is committed to absolute adherence to this requirement in its reporting system.

Accordingly, a reporting calendar shall be established wherein grantor accountability deadlines are tracked for compliance purposes.

Processing Wire Transfers into School Accounts

Government contracts which execute payments via wire transfer remit a wire transfer advice indicating the date and amount of the funds to be deposited in **SCHOOL's** account. This wire transfer advice is processed in the same fashion as a deposit to the bank; with mail opened by the Office Manager or Executive Director and delivery of wire transfer notices to the Financial Consultant. All relevant documentation (wire transfer advice, wire transfer confirmation, Cash Receipts Journal, etc.) should be retained and filed in the Cash Receipts and Transfers Binder under the proper bank account, in date order.

Processing and Recording Transfers within School Accounts

In order to maximize interest income, cash will be maintained in the **escrow / savings (IF APPLICABLE) account** and transferred to the checking account, as necessary to meet OSPI's and the authorizer's funding requirements. Transfers between **SCHOOL** bank accounts shall be made only when properly authorized. **Only** the Chairperson or Treasurer of the Board of Trustees can authorize transfers to and from the escrow account. A written request is to be submitted directly to the financial institution for processing. A Transfer Authorization form will be completed in order to transfer cash between the checking and debit accounts. The Financial Consultant must obtain the Executive Director's signature for transfers below

\$5,000.00. For transfers above \$5,000.00 and under \$15,000.00, the Executive Director and Director of Operations must both approve the transfer. Transfers above \$15,000.00 require approval by both the Executive Director and the Board Treasurer. In the event the Executive Director or Director of Operations or is not available for a signature, the Treasurer of the Board of Trustees will be able to approve transfers in place of one of those individuals, as long as the total transfer value is under \$15,000.00. In the event the Board Treasurer is not available for signature, the Chairperson of the Board of Trustees will be able to approve transfers in the Treasurer's place.

In the event that one of these individuals is not available for an in-person signature, the signatory may send an email stating his or her name and granting permission to execute the transfer, with the promise to sign the Transfer Authorization form in person at the first opportunity. The transfer may then be executed. As soon as the signatory is back on site, the original Transfer Authorization form will be signed in person and attached to the email granting permission. Any and all such correspondence must be retained and filed with the corresponding transfer documents.

Once transfer is authorized by the proper individual(s) and executed, the Transfer Authorization form, transfer confirmation statements, and the Cash Receipts Journal will be filed in the Cash Receipts and Transfers Binder in date order, under the bank account receiving funds.

Revenue Recognition for Grants

In instances where grant funds are received in advance of **SCHOOL** expending money applicable to the grant, the grant funds are recorded in the accounting system as deferred revenue or a liability until the applicable expenses have been incurred. If the grant funds are received after the school has already expended money on goods or services that are covered under the grant, the grant funds can be recorded as revenue at the time of receipt. If the school has expended part of the grant before receiving the actual funds, the only funds that may be recorded as revenues are those that have already been spent. Any remaining grant money must be recorded as deferred revenue or a liability until the time the funds are actually expended by the school.

Pledges or Grants Receivable

To the extent that the school solicits, accepts, and administers for the benefit of the school and its students, gifts, grants, and donations from individuals or public and private entities, the school shall not solicit, accept, and administer any such gifts, grants, or donations from sectarian or religious organizations and shall not accept any gifts or donations the conditions of which violate Chapter 28A.710 RCW or any other state laws.

When revenues are earned yet the cash has not been received for all or a portion of the grant/pledge, a receivable is recorded in the accounting system. When **SCHOOL** receives an Unconditional Pledge to Contribute, it will be acknowledged in a pre- numbered contribution acknowledgement letter drafted by the Office Manager, signed by the Executive Director, and sent to the donor by the Office Manager. The Financial Consultant

will enter the amount of the pledge into the general ledger, discounting to their present value any pledges that go beyond a year. The school will only recognize the pledge as revenue when it is actually paid to the school, just as it does for all other restricted funding. The Financial Consultant will evaluate all Pledges to Contribute quarterly to verify that each item is still collectible.

Revenue Recognition for Per Capita funding

Per capita funding is paid by the state on the last business day of each month.

Government Cost-Reimbursement Contracts

When an expense is incurred that is eligible for reimbursement through a government contract, the Financial Consultant attaches the appropriate Job/Class Code to the expense in the accounting system. The Financial Consultant compiles a monthly report of expenses with Job/Class Codes so that revenue can be recognized accordingly in that month.

Donated Goods and Services

Donated goods and services can include office space, professional services such as outside counsel's legal advice, food, clothing, furniture and equipment, or bargain purchases of materials at prices less than market value. In addition, volunteers can provide free services, including administrative services, participation in fundraising events, and program services that are not accounted for. The Financial Consultant records donated services in the system at fair value or avoided cost, as determined by the donor and documented in writing. When a good or service is donated to the school, a pre-numbered contribution acknowledgement letter will be drafted by the Office Manager, signed by the Executive Director, and sent to the donor by the Office Manager. General Ledger entries are recorded to recognize the in-kind revenues and in-kind expenses.

Donated Materials and Supplies

Donated materials are recorded as contributions to inventory or expenses in the period received and are recorded at their fair market value at the date of receipt. If materials are donated for a specific use, they are considered to be temporarily restricted contributions. The Financial Consultant records donated materials and supplies in the system at fair value or avoided cost, as determined by the donor and documented in writing. When a material or supply is donated to the school, a pre-numbered contribution acknowledgement letter will be drafted by the Office Manager, signed by the Executive Director, and sent to the donor by the Office Manager. General Ledger entries are recorded to recognize the in-kind revenues and in-kind expenses.

Donated Property and Equipment

Property donations received without donor-imposed stipulations are recorded as unrestricted contributions. When property or equipment is donated to the school, a pre-numbered contribution acknowledgement letter will be drafted by the Office Manager, signed by the Executive Director, and sent to the donor by the Office Manager. General Ledger entries are recorded to recognize the in-kind revenues and in-kind expenses.

Donated Stocks

In the event that the school receives donated stocks from a donor, the Financial Consultant records and values these stocks in the accounting system at the time of receipt. When stocks are donated to the school, a pre-numbered contribution acknowledgement letter stating the value of the donated stocks will be drafted by the Office Manager, signed by the Executive Director, and sent to the donor by the Office Manager. General Ledger entries are recorded to recognize transactions related to the donation of stocks.

Accounts Receivable Aging

Accounts receivable outstanding are aged on a thirty, sixty, ninety, and over-ninety day basis. The Financial Consultant should review the accounts receivable aging monthly, determine which invoices are collectible, follow the necessary requirements based on the type of funding, and select which items to collect.



Background

SCHOOL records expenses on the accrual basis of accounting, consistent with generally accepted accounting principles.

By the adoption of the operating budget by the Board of Trustees, the Executive Director becomes both responsible for, and generally authorized to expend, the amounts budgeted. This authorization may, however, be qualified by Board action based upon availability of funds. Such a qualification may necessitate a prioritization of expenditures based upon an incremental implementation of the organization's Business Plan.

While a capital budget may be approved, the authority of the Executive Director to solely commit to individual expenditures under that budget is limited to \$15,000.00 per transaction. Commitments for capital expenditures exceeding that amount must have the co-signature of either the Board Treasurer or the Chairperson of the Board. A capital expenditure is defined as an expenditure for fixed assets exceeding \$1,000.00.

SCHOOL procures only those items and services that are required to fulfill the mission and/or fill a bona fide need. Procurements are made using best value contracting, which entails assessing the best value considering quality, performance and price. This is achieved partly by the Director of Operations, who also has the annual responsibility of reviewing the newly

approved budget to uncover patterns of orders and opportunities for clustering orders to achieve volume discounts.

SCHOOL adheres to the following objectives:

1. Procurements will be completely impartial based strictly on the merits of supplier and contractor proposals and applicable related considerations such as delivery, quantity, quality, etc.
2. The school will make all purchases in the best interests of the school and its funding sources.
3. The school will obtain quality supplies/services needed for delivery at the time and place required.
4. The school will buy from reliable sources of supply.
5. The school will obtain maximum value for all expenditures.
6. The school will deal fairly and impartially with all vendors.
7. The school will be above suspicion of unethical behavior at all times; avoid any conflict of interest, related parties or even the appearance of a conflict of interest in **SCHOOL** supplier relationships. The school's conflict of interest policies are described in its bylaws.

In all purchasing situations, **SCHOOL** utilizes the following procurement guidelines:

The purpose of procurement is to ensure equal access to all potential vendors. Federal procurement must follow all state regulations and be treated consistently with non-federal procurement. If state or local procurement laws and regulations are more restrictive than the federal regulations, they must be followed.

The Laws

School will follow all requirements pertaining to procurement in federal programs found in 34 Code of Federal Regulations (CFR) Section 80.36.

Types of Procurement

There are four types of procurement according to 34 CFR 80.36:

- Small purchases
- Noncompetitive proposals
- Formal advertising
- Competitive proposals

Small purchases and **formal advertising for procurements** of furniture, equipment, and supplies (except books) are regulated by state procurement regulations for school districts found in RCW 28A.335.190.

Noncompetitive proposals, also known as “sole source,” are permitted only in four instances:

- Emergency (such as a fire, flood, hurricane).
- Authorized by awarding agency (such as OSPI, US Department of Education).
- After solicitation of a number of sources, competition is inadequate (such as only one reply).
- The item is available only from one source (must be adequately documented).

Washington State Competitive Proposal Laws

Competitive Bid Procedures are required when using public funds. Competitive Bid Procedures include:

- Furniture, equipment, or supplies, except books
- Building, improvement, repair, or other public works project

Thresholds and Protocols for Competitive Bidding:

	\$40,000 to \$75,000	Over \$75,000
Public Notice	Not Required	At least 1 newspaper of general circulation, 1x/week for at least 2 weeks
Bid Specifications	Not Required	Bid specifications must be available at specified location (ex. office)
Bid Format	Telephone or Written Bids Accepted	Written Bids Only
Minimum # of Bids	Minimum of 3 Bids	No Minimum Required
Bid Availability	Bids must be available for public perusal	Bids must be opened and read in public on specified date; bids must be available for public perusal thereafter

Approval

Approval to fulfill a purchase order is garnered by first filling out a Purchase Request form. Any staff member may fill out a Purchase Request form. Once complete, the form is submitted to the Executive Director or, in the case of instructional staff submitting a request, to the Director of Operations, for an approval signature. The Purchase Request form is reviewed by the proper individual, signed to indicate approval, and returned to the requesting employee. The employee is responsible for transferring the approved Purchase Request form to the Operations Manager for processing.

In the event that an item must be purchased and the proper signatory is not available to provide an in-person signature, the signatory may send an email stating his or her name and granting permission to execute the purchase, with the promise to sign the Purchase Request form in person at the first opportunity. The Purchase Order may then be executed. As soon as

the signatory is back on site, the original Purchase Request form will be signed in person and attached to the email granting permission. Any and all such correspondence must be retained and filed with the corresponding purchase documents.

If necessary, teachers may purchase supplies directly from vendors and apply for reimbursement. Teachers may only acquire up to \$50.00 worth of materials under this policy per academic year, and purchases made in this way must be pre-approved in order to guarantee reimbursement. The school is tax exempt and therefore does not reimburse employees for tax. A copy of the Tax Exempt Certificate may be obtained from the Director of Operations. A detailed description of reimbursement policies can be found below.

Issuance and Monitoring of Purchase Orders

The Director of Operations works closely with the Executive Director to ensure that all necessary instructional and administrative purchases are made in a timely and cost-effective manner and, when applicable, in accordance with grant restrictions.

For all products and services that need to be ordered, a Purchase Request form must be filled out and approved, as outlined above. The approved Purchase Request form is submitted to the Operations Manager for processing. The Operations Manager is responsible for ensuring adherence to the school's procurement guidelines and determining whether the order exceeds the thresholds requiring competitive bidding. All purchasing thresholds apply to the entire order, not single items. For instance, although one computer may cost \$1,500.00 (under the \$40,000 threshold requiring competitive bidding), if 27 computers are being requested, the order total will be \$40,500.00 (above the \$40,000 threshold), and as such, require bids from at least three vendors. The Operations Manager is responsible for conducting all competitive bidding procedures, when required. In these cases, all documentation of applicable bids and/or quotes obtained will be retained and filed as a packet in the Competitive Bidding Binder, organized by the check number that ultimately paid for the item(s) in the order.

The Operations Manager creates a Purchase Order (PO) and based on the total value of the Purchase Order, forwards it to the proper individual(s) for approval. Purchase Orders totaling less than \$5,000.00 may be approved with the signature of **either** the Director of Operations or the Executive Director. Purchase Orders totaling more than \$5,000.00 but less than \$15,000.00 must be approved with the signatures of **both** the Executive Director and the Director of Operations. Purchase Orders totaling more than \$15,000.00 must be approved with the signatures of **both** the Executive Director and the Board Treasurer. In the event the Executive Director or Director of Operations is not available for a signature, the Treasurer of the Board of Trustees will be able to approve purchase orders in place of one of those individuals, as long as the total purchase value is under \$15,000.00. In the event the Board Treasurer is not available for signature, the Chairperson of the Board of Trustees will be able to approve purchase orders in the Treasurer's place.

In the event that an item must be purchased and the proper signatory is not available to provide an in-person signature, the signatory may send an email stating his or her name and

granting permission to execute the Purchase Order, with the promise to sign the Purchase Order in person at the first opportunity. The purchase may then be executed. As soon as the signatory is back on site, the original Purchase Order will be signed in person and attached to the email granting permission. Any and all such correspondence must be retained and filed with the corresponding purchase documents.

Once the Purchase Order is approved with the proper signatures, the Operations Manager reviews the PO for accuracy of dates, account coding, quantities, and arithmetic extensions. The Operations Manager then sends the order to the vendor, accompanied by any required documentation.

The Operations Manager notes the vendor confirmation number(s) on the hard copy PO and files it into the Purchasing Binder under the Purchase Orders Placed tab.

Receipt of Goods

All goods purchased by the school are delivered directly to the school. It is the responsibility of the Office Manager to sign for delivery. The Office Manager is also responsible for opening the box(es) and obtaining the packing slip(s). The packing slip will be reviewed for accuracy, checked against the original PO, stamped as received and signed by the Office Manager. In instances where there is no packing slip, a Substitute Packing Slip form is to be filled out by the Office Manager. If everything is correct and the contents of the entire purchase were received and documented on the packing slip, the packing slip will be stapled to the front of the original PO. This packet is then filed in the Purchasing Binder under the Fully Received tab in order by vendor name. If only part of the purchase was received, the packing slip for the received items is stapled to the back of the original PO and the packet is filed under the Partially Received tab in order by vendor name, until the remaining items are received.

If everything is not correct with the order, the Operations Manager will contact the vendor for a return/credit to the account. When discrepancies occur, they are investigated and resolved by the Director of Operations.

Exemption from Sales Tax

SCHOOL is exempt from state and federal tax. As such, the school is exempt from sales taxes on goods purchased for their own internal use and services. It is the responsibility of the Director of Operations and Operations Manager to ensure that all vendors have a copy of the ST-119 and 501 (c) forms allowing the organization to be exempt from sales taxes.

Reimbursable Expenses

In situations where a purchase is required in short order and the total of the purchase is under \$300.00, staff may make the purchase with their own funds and apply for reimbursement. Reimbursable expenses under \$300.00 will require pre-approval by the Executive Director through a written request. Expenses that have not been pre-approved will not be reimbursed. Please note, teachers may only acquire up to \$50.00 worth of

materials under this policy per academic year. In the event that the Executive Director requires reimbursement, the Treasurer of the Board must approve his/her expenses. It is the employee's responsibility to seek approval prior to incurring costs.

In the event that an item must be purchased and the Executive Director is not available to provide an in-person signature on the Expense Reimbursement Pre-Approval form, the Executive Director may send an email stating his or her name and granting permission to execute the purchase, with the promise to sign the Expense Reimbursement Pre-Approval form in person at the first opportunity. The purchase may then be executed. As soon as the Executive Director is back on site, the original Expense Reimbursement Pre-Approval form will be signed in person and attached to the email granting permission. Any and all such correspondence must be retained and filed with the corresponding purchase documents.

Receipts are required for all expenditures requiring reimbursement. Once expenses have been incurred, requests for reimbursement should be made within 30 days of expense via an Expense Reimbursement form. All receipts should be taped onto blank sheets of paper and attached to the form. These documents are submitted to the Executive Director for review and approval.

If an employee is issued a credit card, their use of the card should be limited to business expenses, and they are responsible for ensuring that all receipts for purchases are turned in as purchases are made.

Employees should note that the school is tax exempt and therefore does not reimburse employees for tax. A copy of the Tax Exempt Certificate may be obtained from the Director of Operations.

Travel Expenses

Travel arrangements will be purchased using the school credit card. In situations where expenses are incurred during the course of business travel, staff may apply for expense reimbursement. No single purchase made while traveling may exceed \$300.00. Expectations for daily expenses or per diem allowances will be determined prior to the employee trip. Employees should file for reimbursement in the manner described in the above section, although pre-approval for each business travel expense will not be required. Receipts are required for all expenditures requiring reimbursement, and requests for reimbursement must be made within 30 days of expense. In the event that the Executive Director requires travel reimbursement, the Treasurer of the Board must approve his/her expenses.

Employees should note that the school is tax exempt and therefore does not reimburse employees for tax. A copy of the Tax Exempt Certificate may be obtained from the Director of Operations.

Mileage Reimbursement

All employees are reimbursed at the standard mileage rate per mile as determined by the Internal Revenue Service for use of their own vehicle for business-related travel. Parking fees and tolls paid are reimbursable if supported by receipts.

All employees requesting such mileage reimbursement are required to furnish a Travel Report containing the destination of each trip, its purpose and the miles driven, parking fees and tolls. All corresponding receipts must be taped to blank sheets of paper and attached to the Travel Report. This packet must be submitted to the Executive Director for approval within 30 days of the travel date in order for the employee to receive reimbursement.

Credit Card Purchases

SCHOOL's credit cards will be provided to the Executive Director and Director of Operations. Credit card use is to be generally restricted to the making of travel arrangements for trustees and staff and for making arrangements with hotels and conference facilities for approved travel and meetings. The credit card is not to be used for accounts payable or other day-to-day transactions. The credit card may be used for capital expenditures, but all approval and budgetary restrictions as outlined in this policy manual shall apply.

Credit card purchase requests totaling less than \$5,000.00 may be approved solely with the signature of the Executive Director via the Credit Card Purchase Request form. Credit card purchase requests totaling more than \$5,000.00 but less than \$15,000.00 must be approved with the signatures of **both** the Executive Director and the Director of Operations. Credit card purchase requests totaling more than \$15,000.00 must be approved with the signatures of **both** the Executive Director and the Treasurer of the Board. In the event the Executive Director or Director of Operations or is not available for a signature, the Treasurer of the Board of Trustees will be able to approve credit card purchases in place of one of those individuals, as long as the total purchase value is under \$15,000.00. In the event the Board Treasurer is not available for signature, the Chairperson of the Board of Trustees will be able to approve credit card purchases in the Treasurer's place.

In the event that an item must be purchased and the proper signatory is not available to provide an in-person signature, the signatory may send an email stating his or her name and granting permission to execute the credit card purchase, with the promise to sign the Credit Card Purchase Request form in person at the first opportunity. The purchase may then be executed. As soon as the signatory is back on site, the original Credit Card Purchase Request form will be signed in person and attached to the email granting permission. Any and all such correspondence must be retained and filed with the corresponding purchase documents.

Once the form is returned to the requestor with proper approval, the cardholder may execute the purchase, making sure to retain all receipts.

If one of the above-named approving signatories is the individual requesting use of the credit card and the total purchase amount is under \$5,000.00, the following procedures will be followed: The Executive Director will approve purchase requests made by the Director of Operations. The Treasurer of the Board will approve purchase requests made by the Executive Director. In this same situation, if the total purchase amount is over \$5,000.00, the

request must be approved by two of the four approving signatories, not including the signatory that is making the purchase request.

The approved Credit Card Purchase Request form and receipt(s) are submitted to the Director of Operations for processing. This includes the coding of each expense for the month, so that each can be properly recorded. If there is any question as to how to code a particular expense, the Director of Operations consults with the Executive Director for clarification. If the Executive Director is unavailable, the unclear expense is booked to the **NAME** account, which will be cleared when the month-end financials are produced or as the Executive Director is able to respond. The Financial Consultant pays all monthly credit card bills in full. The charges are entered in **PAYROLL SOFTWARE** by the Financial Consultant and reconciled by the Financial Consultant. All bills and invoices are subsequently filed accordingly in the proper binder. Credit card statements are opened only by the Treasurer of the Board.

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PROCESSING CASH DISBURSEMENTS

Processing Invoices

All invoices are mailed to **SCHOOL** directly. The Office Manager is responsible for sorting, opening, signing and dating all invoices.

If an invoice is received prior to receipt of goods, the Office Manager files the invoice in the Purchasing Binder under the Invoices without Packing Slips tab, in order by vendor name.

Once the goods have been received (or in the case that the shipment had already been received at the time of invoice arrival), the Office Manager staples the invoice to the top of the corresponding packet composed of packing slip, purchase order, and Purchase Request form. This expanded packet is now a complete Cash Disbursement packet (invoice/packing slip/purchase order/purchase request). The Cash Disbursement packet is filed in the Purchasing Binder under the Invoices to be Posted tab, in order by vendor name.

In instances where invoices cannot be obtained and a payment is required, a Check Request form is filled out. In this case, any applicable documentation to back up payments requested should be attached. The Check Request form will document the payee, payment due date, amount of payment, etc.

Invoices shall be processed weekly by the Financial Consultant. The Financial Consultant establishes the vendor file in the accounting system and reviews the invoice for any purchase

discounts dates and properly captures the discount period in the system. The Financial Consultant enters invoices into the accounting system with the correct general ledger codes and then moves the Cash Disbursement packet to the Invoices to be Paid tab of the Purchasing Binder, sorted by vendor name.

Cutting Checks

The Financial Consultant will maintain all blank check stock in a locked location. All checks will be pre-numbered, voucher style, containing one stub for the vendor (attached to all outgoing checks) and one to be filed by the Financial Consultant with all supporting disbursement documents.

Checks are run on a weekly basis, and vendors are paid based on terms of the invoices, as recorded within the system. Check preparation and signatures are prepared not later than the due date, consistent with available discounts if available.

The Executive Director, Director of Operations, Treasurer of the Board of Trustees, and Chairperson of the Board of Trustees are signatories on the checking account. The Financial Consultant must obtain the Executive Director's signature for checks below \$5,000.00. For checks above \$5,000.00 and under \$15,000.00, the Executive Director and Director of Operations both sign the check. Checks above \$15,000.00 require signature by both the Executive Director and the Treasurer of the Board of Trustees. In the event the Executive Director or Director of Operations is not available for a signature, the Treasurer of the Board of Trustees will be able to sign checks in place of one of those individuals, as long as the total check value is under \$15,000.00. In the event the Board Treasurer is not available for signature, the Chairperson of the Board of Trustees will be able to sign checks in the Treasurer's place.

The Financial Consultant processes payment for the invoice and creates a check. The check is submitted to the required signatories (see above) for signature(s), along with the corresponding Cash Disbursement packet (invoice/packing slip/purchase order/purchase request). At the time the check is signed, any required signatories should review the supporting documentation to ensure they are signing a check for the correct amount and to the correct payee. They should also initial and date each page of the supporting documentation to indicate that the item was received and appropriate payment has been disbursed. The Financial Consultant staples the check stub or copy of the signed check to the top of the Cash Disbursement packet and files it in the Cash Disbursements Binder in check number order, starting with the first check after July 1st and ending with the last check on June 30th. The Financial Consultant mails the check to the vendor awaiting payment. Electronic fund transfers may also be used, where the same authorizations as checks will be obtained using an Electronic Payment Authorization form. See below for details.

In no event shall an authorized signatory approve an invoice, execute a check, or authorize a disbursement of any kind, payable to him/herself.

Any and all voided checks should be stamped "void" with the date and filed in the Cash

Disbursements Binder in check number order. If a check has gone missing, use a Missing Voided Check Substitute form to act as a placeholder in the Cash Disbursements Binder.

Online/Phone/Fax/EFT Payments

Payments made online or by phone, fax, or electronic funds transfer (EFT) may be processed by the Financial Consultant only after an Electronic Payment Authorization form is approved by the proper signatories (detailed above). The same controls should be followed except that the completed, approved Electronic Payment Authorization form will take the place of a traditional check. Any such payment is documented by a printed confirmation and stapled to the invoice. QuickBooks creates journal entries based on the vendor as cash is credited and the appropriate expense type is debited. Electronic payments will be recognized in QuickBooks just as if it were a check, by entering a unique transaction number in place of the check number. The Electronic Cash Disbursement packet, composed of Electronic Payment Authorization form, confirmation page, and any other supporting documentation, is filed in the Online/Phone/Fax/EFT Disbursements Binder in date order.

Recurring Expenses

Recurring expenses do not require any sort of special treatment. Payments for goods and services that are required on a regular basis (e.g. equipment lease, insurance payments, rent) are handled in the same manner as non-recurring expenses, as described above.

Accounts Payable Aging

Accounts payable outstanding are aged on a thirty, sixty, ninety, and over-ninety day basis. The Financial Consultant should review the accounts payable aging monthly, determine the available cash balances while taking into consideration other cash requirements in the near future, and select items to pay.

Petty Cash Account

It is the policy of SCHOOL not to use petty cash and instead to reimburse employees for pre-approved expenses.

Insurance Coverage

Insurance coverage is maintained pursuant to applicable law.

Currently, SCHOOL maintains insurance policies, including: Worker's Compensation, Property, General Liability, Automobile Liability, Automobile Physical Damage, School Board Legal Liability/Errors and Omissions, Employee Benefits Liability, Educators Legal Liability, Sexual Harassment, Sexual Abuse, Crime (money and securities, forgery and alteration, employee dishonesty), Terrorism, Umbrella, and Risk Management and School Safety Services.

The Board of Trustees, Executive Director, and Director of Operations will conduct a semiannual review of coverage amounts. The purpose of this review will be to ensure there are adequate means by which to preserve the school's assets and lower the risk of being underinsured. Any proposed changes must be approved by the Board of Trustees and recorded

in board meeting minutes. New coverages will be executed by the Director of Operations. The Director of Operations is responsible for procuring annual renewals with the school's insurance broker. Quotes for renewal will be procured at least one month in advance of a policy's expiration, and presented to the Executive Director for review and approval. The Treasurer of the Board of Trustees participates in this review.

The Director of Operations maintains original copies of all insurance policies at the school, filed in the Insurance Binder by type of insurance. A new binder is created for each fiscal year. When possible, copies of all current insurance policies are saved electronically on a server where the leadership team can view and access the information.

SCHOOL requires proof of adequate insurance coverage from all prospective contractors, as deemed applicable by the Board of Trustees.

Political Contributions

No funds or assets SCHOOL may be contributed to any political party or organization or to any individual who either holds public office or is a candidate for public office. SCHOOL also cannot be involved with any committee or other organization that raises funds for political purposes. Examples of prohibited activities are:

- Political contributions by an employee that are reimbursed by the school organization.
- Purchase by the organization of tickets for political fundraising events.
- Contributions in kind, such as lending employees to political parties or using school assets in political campaigns.

MANAGEMENT OF CASH

Accounts

SCHOOL banks with **NAME Bank** and has a total of **three (3)** bank accounts. One is a checking account; the second is a debit account intended to be used for purchasing; the third is an **escrow account (IF APPLICABLE)** in which money to cover dissolution expenses will be deposited in accordance with guidance from **AUTHORIZER**. The **AUTHORIZER** escrow requirement is \$25,000 each year during the first three years of operations, to \$75,000 total. This is covered in the new **INCLUDE LANGUAGE FROM CHARTER CONTRACT, IF APPLICABLE**. In all instances, the school is utilizing its accounts in a way that safely maximizes its overall interest income. The school account has 4 Authorized Signers: the Executive Director, Director of Operations, Treasurer of the Board of Trustees, and Chairperson of the Board of Trustees. Bank statements are received monthly at the

school, and are always opened only by the Treasurer of the Board.

The school's third account is an escrow account. **AUTHORIZER** requires each school to set up an escrow account. **SCHOOL** will maintain an escrow account that complies with the following requirements: **INCLUDE IF APPLICABLE**.

In the event that the organization wishes to open a new bank account, board approval is required. As part of the approval, the Board must describe the purpose of the account, signatories, and signatories' authority. The vote to approve and all associated determinations must be recorded in the board minutes. Should the school wish to close a bank account, Board approval is also required and will be documented in board minutes.

SCHOOL recognizes that federal insurance on deposits with any bank is limited to a total of \$250,000.00, regardless of the number of accounts held. In the event the balance in a school account is anticipated to be in excess of the insurance coverage, a "re-positioning" agreement is to be negotiated with the financial institution in order to secure such deposits in excess of federal coverage.

Bank Statements

When bank statements are received at the school, the unopened envelope should be stamped as received by the Office Manager with the date. The unopened envelope should then be transferred immediately to the Board Treasurer, or held in a locked, secure location until the Board Treasurer is on site. Once the Board Treasurer receives the envelope, s/he should open and review the contents. Any credit card or bank statements must be marked "Reviewed by" (with initials and date) and "Approved by" (with signature). The credit/debit card or bank statement should then be transferred immediately to the Financial Consultant for review, payment, and filing.

Copies of monthly bank statements are also directly mailed to the Board Chair and the Board Treasurer for review. The review is performed to ensure that the Executive Director who approved purchases and the Financial Consultant who processed the payments did not process any unauthorized activities. After review by the Board Treasurer, each statement is submitted to the Financial Consultant to complete the bank reconciliation.

Bank Reconciliation

Using the QuickBooks bank reconciliation function, reconciliations are prepared monthly for all bank accounts. This preparation is accomplished by the Financial Consultant, who identifies reconciling items to ensure that cash is being accounted for properly. Any irregularities shall immediately be reported to the Executive Director and the Treasurer of the Board of Trustees. A bank reconciliation report from QuickBooks showing the unreconciled amount as zero is printed and attached to the bank statement. The report is submitted to the Director of Operations, Executive Director, and Treasurer of the Board of Trustees for review, initialed by each and returned to the Financial Consultant. The Financial Consultant files the statement and reconciliation report in the Bank Reconciliation Binder in date order, sorted by bank account.

Related Party Transactions

There are instances where related parties may incur expenses of behalf of each other. For example, it is possible that SCHOOL might incur expenses on behalf of Friends of SCHOOL, and vice versa. On a quarterly basis, the accounting will be reconciled between the two entities to ensure that there are no funds owed from one entity to the other at the end of the fiscal year.

Investment of Funds

At present, SCHOOL does not have any investment accounts. As such, this section does not currently apply to SCHOOL. When the school has funds available for investment, the following policies will apply.

The Board of Trustees sets the investment policy for SCHOOL. The investment policy provides general guidelines regarding the type of investments deemed appropriate and the objectives of each investment (e.g., overnight deposits for excess cash, 90 day Treasury notes for excess working capital, etc.). The Treasurer of the Board of Trustees has been designated to implement the Board's investment policy. The Financial Consultant has been granted authority to:

- Purchase and sell investments
- Have access to investment certificates
- Keep records of investments and investment earnings
- Review and approve investment accounting, bank and broker statement reconciliations, adjustments to the carrying value of investments, and other decisions regarding investments

Authorization of Investment Vehicles

Annually, the organization's Board of Trustees authorizes use of specific depository and investment banks and brokerage firms. This authorization is documented in the minutes of the applicable board meeting and communicated to the Executive Director. The Financial Consultant communicates the authorization and a list of those personnel designated as authorized agents for the agency to the appropriate banks and firms. As a part of the annual authorization process, the Board Treasurer in consultation with the Financial Consultant evaluates the organization's prior relationship with banks and brokerage firms to determine suitability for renewal. Such evaluation considers service responsiveness, types of investments offered, quality of investment advice, service and transaction charges, and any other relevant criteria.

Authorization of Investments

All transactions regarding investments must be properly authorized by the Board Treasurer and properly communicated to the Board of Trustees. Such transactions include:

- Purchases
- Sales
- Movement to and from safekeeping (the physical safeguarding of assets through use of a vault, safe deposit box, or independent custodian)

Investment Purchases

Investment purchases are made by check or bank transfer after compliance with the following procedures:

- A determination that the purchase transaction is properly authorized in accordance with agency policy
- Preparation of a check requisition or a bank transfer request to accompany the investment purchase/sale authorization form

Investment Sales

Investment sales are transacted after compliance with the following procedures:

- A determination that the sale transaction is properly authorized
 - The sales authorization is sent to the agent handling the sale transaction for investments held on the premises. Authorization to the agent is communicated in writing. If investments are kept off site, authorization to release the document from safekeeping is provided to the custodian. The custodian provides the agency with a receipt documenting the release from safekeeping. The receipt should be filed in the investment files.

Investment Sales Gain or Loss

The Financial Consultant will calculate the expected gain or loss upon sale or other disposition of an investment, before a decision regarding the sale is finalized. The calculation is updated/finalized subsequent to the sale and documented in the investment file.

Investment Sales Proceeds

Proceeds from the sale of investments are received either by check or bank transfer, to the attention of the Financial Consultant. A copy of the receipt or deposit ticket is included in the investment file.

Investment Results Reports

Monthly reports detailing the earnings and activity in all investment accounts are prepared by the Financial Consultant and distributed to appropriate management and board personnel. The summary of all transactions for the month is recorded in the general ledger through the use of a journal entry. Journal entries are reviewed by the Financial Consultant.

Reconciliation of Investment Accounts

Investment account balances are reconciled with the general ledger balance, by the Financial Consultant on a quarterly basis. Such reconciliation is reviewed and approved by the Executive Director.

Investment Account Balances Agreed to Third Party Statements

Amounts recorded on the general ledger and supporting schedules are reconciled to third-party statements at least quarterly and preferably monthly, if possible. For those investments held on the agency's premises or at a safe deposit vault, quarterly physical inventories are performed and reconciled to the supporting schedules. The Financial Consultant reviews and initials these reconciliations.

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PAYROLL

Hiring

Requests for new employees are initiated by the Executive Director and compared with the approved annual personnel budget. Any new hire will be subject to a full investigation, including a background check, fingerprinting, and references from former employers. Once hired, the Financial Consultant will collect all necessary payroll data and communicate it to the outside payroll service provider. New employees complete an Application for Employment and the IRS W-4 Form and I-9 Form.

If a situation arises where an employee must begin service before fingerprint clearance is obtained, the employee must receive an Emergency Conditional Appointment that has been approved by SCHOOL's Board of Trustees. Under a conditional appointment, the staff person is will be supervised on a regular basis to ensure the safety of students. Employees who have never been fingerprinted for OSPI and the Department of Justice must be fingerprinted at a regional ESD, any police precinct, or another entity arranged or approved by SCHOOL.

Salary Determination

Incoming Instructional Staff

SCHOOL has established a set salary formula for all incoming instructional staff positions. **INSERT SALARY DETERMINATION POLICY OR PARAMETERS HERE.** The wages of incoming teachers are approved by the Board's Finance Committee and the Board of Trustees as line items within the budget approval process.

Incoming Administrators and Non-Instructional Staff

Incoming administrators and non-instructional staff are paid market competitive wages. Salary is negotiated by the Executive Director and must be equal to or less than the budgeted salary for the employee in the SCHOOL budget for the relevant fiscal year.

The wages of incoming administrators and staff are approved by the Board's Finance Committee and the Board of Trustees as line items within the budget approval process.

Returning Instructional Staff, Administrators and Non-Instructional Staff

Returning instructional staff, administrators and non-instructional staff at SCHOOL are paid their previous year's salary plus a discretionary raise set by the Executive Director. The Executive Director is not required to raise any salary from year to year. In any given year, the average raise for SCHOOL employees may not exceed X%. Salary raises are subject to the review of the Board's Finance Committee and the Board of Trustees within the budget approval process.

The Board of Trustees determines the Executive Director's salary. Any such decisions will be captured in the Board meeting minutes. Any changes to a staff member's salary will be approved by the Executive Director in writing or electronically and documented. A copy of this documentation will be maintained in the employee file.

In March of each year, the Executive Director shall present the Finance Committee of the Board with a Compensation Budget and a report on compensation.

- The Compensation Budget will detail the resources allocated to:
 - o Salaries for incoming teachers
 - o Salaries for incoming administrators and staff
 - o Salary for returning teachers, administrators and staff
 - o Bonuses for teachers
 - o Bonuses for each administrator
- The report on compensation will include such information as is necessary to provide the Finance Committee with a fair and complete picture of the resources allocated to compensation at SCHOOL. Helpful information will include the amount by which total compensation at SCHOOL has increased from the previous fiscal year, the names and job descriptions of employees receiving the largest salary increases, and the names and job descriptions of the five highest paid employees.

The Finance Committee may request additional information from the Executive Director with regard to compensation or require that the Executive Director make changes to the Compensation Budget and resubmit for the Compensation Committee's review.

The Finance Committee must pre-approve the Compensation Budget before it is integrated into the SCHOOL budget and presented to the Board of Trustees.

Bonus Policy

Bonus calculations, requirements, and eligibility are reviewed and approved by the Finance Committee of the Board of Trustees. Instructional staff and administrators are eligible for bonus pay in **MONTH** of each year. Salary bonuses are determined by the Executive Director. The Executive Director can pay bonuses **INSERT BONUS POLICY HERE, IF APPLICABLE**. In June of each year, the Executive Director shall present the Finance Committee of the Board with a Bonus Report. The Bonus Report shall include the names and job descriptions of each employee receiving a bonus and the amount of the bonus that employee will receive. The Finance Committee must pre-approve the Bonus Report before bonuses are paid on or about **MONTH XXth**.

The Executive Director can seek a waiver from these procedures. A waiver can only be obtained through the written consent of both the Chair of the Finance Committee and the Treasurer of the Finance Committee of the Board of Trustees.

Compensation Accrual

Total compensation cost will be accrued and expensed over the eleven months of the school year. Although each fiscal year starts on July 1st and ends on June 30th, not every staff member's service start and end dates will mirror the fiscal year. In order to accurately record these expenses according to GAAP, wages may be accrued. For example, if a teacher works from August 16th through June 30th, yet is paid from August 16th through August 15th, 1.5 months of wages will be accrued to the prior fiscal year for the period of July 1st to August 15th. Wages will be accrued according to the start and end dates of pay in order to recognize expenses in the correct fiscal year.

Employees vs. Independent Contractors

When **SCHOOL** makes the choice to utilize an independent contractor, it first ensures that the individual does qualify as an independent contractor and should not be categorized as a regular employee. True independent contractors do not have taxes withheld and typically invoice the school to receive payment. Before the school engages an independent contractor, it sets up the relationship in such a way as to ensure that the status is in accordance with employment and tax law. Generally, if a worker is being managed closely on a day-to-day basis, he or she must be paid as an employee and have statutory deductions taken from his/her paycheck. In analyzing whether or not a worker qualifies as an independent contractor, the school should review each of the questions below.

The following questions are designed as a guide to help delineate between employees and contractors:

- How much control does the employer exercise over the worker?
- Who sets the hours and schedule for the worker?
- How much control does the worker have over the manner in which they go

about their work – i.e. does the employer dictate how the job is done or simply expect the job to be finished?

- Does the worker use his or her own tools or equipment?
- Is the worker located on the employer's premises or does s/he work out of his or her own space?
- Is the worker exclusively employed by the employer or free to contract with others to provide the same or a similar service?
- Do the contract terms pay the worker a fixed sum, with the obligation to pay expenses, payroll taxes, and any relevant benefits resting with the worker?
- Does the worker use company letterhead?
- Who pays for the worker's expenses?

Utilization of Independent Contractors/Consultants

Once the determination has been made that a worker is an independent contractor, the school creates a written contract directly identifying the individual's status as an independent contractor and detailing why the relationship is as such. Part of the contract should enumerate the rights and responsibilities on both sides of the independent contractor agreement. This includes clearly identifying the worker's responsibility to pay estimated tax, self-employment tax, and so on. The utilization of all consultants and contract personnel are sufficiently evidenced by:

- a. Details of all agreements (e.g., work requirements, rate of compensation, and nature and amount of other expenses, if any) with the individuals or organizations providing the services and details of actual services performed.
- b. Invoices or billings submitted by consultants, including sufficient detail as to the time expended and nature of the actual services performed.
- c. The use of a management contract for educational and administrative services will clearly identify the contractor's performance requirements, including students' academic achievement, contractor's compensation and **SCHOOL'S** rights to educational curricula and intellectual property developed (if applicable).

In processing payroll for any independent contractor, a W-9 form must be filled out prior to issuance of the first payment for services provided. In all cases where compensation exceeded the \$600.00, a 1099-Misc will be issued, as required by law.

Obtaining Payroll Information

The Financial Consultant is responsible for the following:

Establishing a Personnel File for Each Employee

The personnel file serves as a chronological performance record throughout the employee's tenure with the organization and, as such, is kept secure and confidential. Personnel records are kept for a minimum of ten years. All personnel files must be kept in a locked file cabinet. Access to such personnel files is limited to the Financial Consultant, Director of Operations, and the Executive Director.

Employee files are the sole property of **SCHOOL**. No employee can review or access his or her own personnel file without the written permission of the Executive Director. The employee will be provided with the opportunity to rebut and respond to any document contained in the personnel file in writing. All materials associated with the rebuttal and response shall stay in the personnel file. Any employee may examine his or her personnel file in the presence of the Executive Director or his or her designee. The employee may take written notes concerning the contents of the personnel file, and may add comments for inclusion in the file. No personnel file is to be copied or removed from the office where it is kept unless expressly permitted in writing by the Executive Director.

Personnel files for employees will contain the following documents:

Form	Update Timeline	Month for Update (if applicable)
Offer Letter	Annually	
Fingerprint Check	No update needed	
Federal Withholding Form W-4	As needed	
Benefits Enrollment – Medical	Annually, as needed	August
Benefits Enrollment – Dental / Vision	As needed	August
Benefits Enrollment – Life Insurance	As needed	
Retirement Account Application	As needed	
Retirement Beneficiary Information	As needed	
Certifications (if applicable)	As needed	
Resume	As needed	
Job description	As needed	
Annual Evaluation Documentation	Annually	
Direct Deposit	As needed	
Signed Acknowledgement of Receipt and Reading of Staff Handbook	As needed	
Signed Acknowledgement of Receipt and Reading of School Technology Policy	As needed	

A separate binder in a separate locked location is maintained for I-9s, (including copies of Driver's Licenses/State IDs and Social Security Cards or Passports), as required by the U.S. Department of Homeland Security. Each I-9 form is filled out entirely in the same color ink. All information entered on the I-9 is verified by the Executive Director,

who signs off on the form after seeing original copies of all required documentation (copies are only made for the file, and are not acceptable forms of initial verification).

SCHOOL complies with the laws and general principles of employee confidentiality as set forth in the Health Insurance Portability and Accountability Act (HIPAA) with regard to the dissemination of private health information (PHI) of school employees. In order to comply with all rules and regulations, including the Americans with Disabilities Act (ADA), **SCHOOL** will keep all medical records and all other necessary documents separate from the personnel file. Employees should consult with the Director of Operations for further information concerning the school's privacy practices.

Employee Information

In order to prepare a payroll, the Financial Consultant obtains and maintains the following information for each employee:

Information	Source of Data
Name and Address	W-4
Social Security Number (SSN)	W-4
Date of Birth	I-9
Job Title	Job Description
Wage Rate	Employee Agreement/Offer of Employment
Withholding Status	W-4
Other authorized deductions	Employer information sheet

Analyzing Job Information

The Fair Labor Standards Act (FLSA) sets employee minimum wage and overtime requirements. Job positions are classified as either exempt or non-exempt from the requirements. These requirements are summarized below and are adhered to by the school.

Attribute	Exempt	Non-exempt
Payment amount	The employer pays an exempt employee a fixed salary for any and all work performed during a workweek. Minimum wage and overtime pay requirements do not	The employer may pay a non-exempt employee using an hourly, salary, commission, or any other method. Total compensation must be at least the minimum wage for

	apply.	all hours plus overtime pay for hours over the maximum.
Pay deductions	Generally, deductions for time not worked may not be made from salary.	The employer pays a non-exempt employee only for the hours worked. Therefore, wage deductions may be made for tardiness, full- or partial-day absences, and any time the employee does not work.

NON-EXEMPT employees are entitled to overtime pay for all hours worked over 40 hours in a workweek under the Fair Labor Standards Act. Non-exempt employees do not receive compensation for their lunchtime and they may not work during lunchtime.

EXEMPT employees are not entitled to overtime pay under the Fair Labor Standards Act.

In addition to the above categories, each employee will belong to one other employment category:

- **REGULAR FULL-TIME employees** are those who are regularly scheduled to work at least 40 hours per week. They receive all mandatory benefits and are generally eligible for all of **SCHOOL'S** discretionary benefits, subject to the terms, conditions and limitations of each benefit program, as in effect from time to time.
- **PART-TIME employees** are those employees who are regularly scheduled to work less than 40 hours per week. They receive all legally mandated benefits but are not generally eligible for **SCHOOL'S** discretionary benefits.
- **TEMPORARY employees** are those that are hired for short-term periods, usually no longer than 6 months. They will receive all legally mandated benefits but are not eligible for **SCHOOL'S** discretionary benefits.

Additionally, employees may be hired as eleven- or twelve-month employees. Eleven- month employees include, but are not limited to teachers and program staff. Twelve- month employees include most administrative employees. This determination is made at the time of hire and is indicated in the employee's hire letter or employment contract, if applicable.

Withholding Status

The completed W-4 and IT-2104 forms serve as a basis for employee withholding. If an employee needs to change withholding allowances, the employee must file amended W-4 and IT-2104 forms within 10 days of an event that *increases or decreases* the number of withholding allowances. An employee may amend his/her W-4 and IT-2104 forms to increase the number of withholding allowances at any time. In addition, employees are required to notify the Financial Consultant of any change in

name, family status, address, telephone number, emergency contact or other information concerning personnel data held or used by SCHOOL within two (2) weeks of any change. Any employee who fails to notify the Financial Consultant of any change in the above information within the two-week reporting period may be subject to disciplinary action, including termination of employment.

When W-4 and IT-2104 forms are received, the school's operations team will comply with the new withholding instructions by the next payroll period. The withholding instructions will usually continue to apply unless and until the employee amends the W-4 and IT-2104 forms.

Although not obligated to evaluate an employee's number of exemptions, the school has three duties relating to the contents of the W-4 and IT-2104 forms:

1. Disregard invalid W-4 and IT-2104 forms. A form is rendered invalid if the employee changes or adds language to the form.
2. Report excessive allowances. The organization is required to send copies of all W-4 and IT-2104 forms claiming more than 10 withholding allowances along with the organization Form 941 to the IRS.
3. Report full exemptions. The organization is required to send the IRS all claims for full exemptions from withholdings by employees with normal weekly wages of more than \$200.00.

Because of their importance to both the IRS and to employees, the school retains signed originals of the W-4 and IT-2104 forms (no copies) for four years after the annual employment tax returns are filed.

Time Reporting Procedures

Employees are instructed on the proper charging of time to assure the accuracy of recorded time to cost objectives. At present, SCHOOL does not employ any non-exempt, hourly staff members. In the event that the school does employ hourly staff, however, the following policies and procedures will be followed.

The Financial Consultant and Director of Operations will keep track of all sick days, personal days, vacation days, professional development days, holidays, bereavement or any other days that exempt employees are not at work.

All non-exempt employees are responsible for recording the actual time they have worked. Federal and state laws require SCHOOL to keep an accurate record of time worked in order to calculate pay and benefits. SCHOOL complies with

applicable federal, state and local wage and hour laws. If an employee suspects that an error in pay has been made, the employee must immediately bring the issue to his or her supervisor's attention for prompt investigation and any necessary correction will be made. **SCHOOL** will not tolerate any form of retaliation against an employee who reports a violation, files a complaint, or cooperates in an investigation concerning payment of wages. Violators of this policy will be subject to disciplinary action, up to and including termination of employment.

Time worked is solely the time actually spent on the job performing assigned duties and should not include any time that is spent not working or any time off that is taken during the workday. Non-exempt employees must accurately record the time they begin and end work, the time they begin and end each meal period, and the beginning and ending time of any breaks exceeding 15 minutes. All overtime work must be approved by the supervisor before it is performed. Violators of this policy will be subject to disciplinary action, up to and including termination of employment.

SCHOOL requires non-exempt employees to regularly complete accurate timesheets. These timesheets are due at the end of every pay period and must be timely and accurately provided to the employee's supervisor. Failure to do so may result in disciplinary action, up to and including termination of employment. Labor hours are accurately recorded and any corrections to timekeeping records, including the appropriate authorizations and approvals, are documented. Employees may submit their time through **PAYROLL PROVIDER**. Completed timesheets must be signed by both the employee and the employee's direct supervisor.

Hours charged on timesheets are reconciled to attendance records by the Financial Consultant or Director of Operations. The Financial Consultant forwards the timesheets to the Executive Director, who reviews and approves them. Once approved by the Executive Director, authorized timesheets are collected by the Financial Consultant for processing and communication to the payroll vendor.

Altering, falsifying, or tampering with time records or recording time on another employee's time record will result in disciplinary action, up to and including termination.

Salaried, exempt employees are paid their entire salary for every day in which they perform any work. Deductions from an exempt employee's pre-determined salary or charge against an exempt employee's accrued leave may be taken under one of the following circumstances, unless otherwise prohibited by law:

1. the employee is absent from work for one or more full days for personal reasons (other than sickness or disability);
2. the employee is absent for one or more full days due to sickness or disability and has exhausted his/her paid leave time under the sick leave policy;
3. the deduction is made to offset any amounts received as payment for jury fees,

- witness fees, or military pay;
4. the employee is on an unpaid disciplinary suspension imposed in good faith for violating published workplace conduct rules (e.g., rules against workplace harassment or safety rules of major significance);
 5. it is the employee's first or last week of employment and he/she is paid a proportionate part of his/her full salary.

SCHOOL makes a good faith effort to comply with this salary policy. If, however, an employee believes an improper deduction has been taken from his/her salary, the employee should contact the Financial Consultant. The Financial Consultant will investigate the deduction and provide the employee with his or her findings. If the Financial Consultant determines that a deduction was improperly made, **SCHOOL** will reimburse the employee for that deduction.

Overtime pay applies only to non-exempt employees. When operating requirements or other organizational needs cannot be met during regular working hours, employees may be required to work overtime. Whenever possible, employees will be given the opportunity to volunteer for overtime work assignments, and every effort will be made to distribute overtime opportunities as equitably as possible to all employees qualified to perform the required work. Overtime pay is provided to non-exempt employees in accordance with federal and state wage and hour laws that generally require time-and-one-half the employee's regular rate of pay for any hours worked beyond 40 hours in a workweek. Overtime pay is based on actual hours worked.

Time off for no-fault days, leaves of absence, and unpaid lunch hours will not be considered hours worked for purposes of calculating overtime pay. All overtime work must have the supervisor's prior authorization. Employees who work overtime without prior authorization will be subject to disciplinary action, up to and including termination of employment.

Processing Payroll

The Financial Consultant will first develop an Excel spreadsheet containing the school's entire payroll. The contents of this spreadsheet must be approved by the Executive Director. After the Executive Director's approval has been obtained, the data from the spreadsheet is input into the **PAYROLL PROVIDER** system, creating an official Payroll Register Preview. The **PAYROLL PROVIDER** Payroll Register Preview is again approved by the Executive Director. Once approved, the **PAYROLL PROVIDER** Payroll Register Preview as well as the original Excel spreadsheet are filed in the Payroll binder.

The school uses an outside service, **PAYROLL PROVIDER**, to process its payroll. Please note, in processing payroll for any independent contractor, a W-9 form must be filled out prior to issuance of the first payment for services provided.

Payroll Processing is comprised of the following:

Responsibility	Performed by
Obtaining/Processing Payroll Information	Financial Consultant
Computing Wages	
Performing Pay Period Activities	
Preparing various annual payroll tax returns	
Preparing 1099's*	Financial Consultant

*for independent contractors, LLPs and LLCs only

Pay periods are **semi-monthly** in length. Both salaried and hourly employees are paid on the same schedule. Employees will be paid on the 15th and 30th of each month. In the event that the 15th or 30th of the month falls on the weekend, the pay date will be the next nearest business day. In February, pay will be distributed on the 28th, or the next business day.

All employees are paid on a 12-month schedule, regardless of whether they are 12-month employees or 11-month employees. A pay schedule will be circulated during staff pre-service for the school year.

Once payroll documents are received from the payroll vendor (e.g., calculations, payrolls and payroll summaries), they are compared with timesheets, pay rates, payroll deductions, compensated absences etc. by the Financial Consultant. The Financial Consultant verifies gross pay and payroll deductions and compares the total hours and number of employees with the totals in the Payroll Register. The Payroll Register is reviewed and approved by the Financial Consultant, who then forwards the payroll checks and the Payroll Register to the Executive Director for signature. Once signed, payroll payments by check, direct deposit or cash are distributed to employees by the Office Manager, and the Payroll Register is filed.

The Financial Consultant controls and monitors all undelivered and uncashed payroll checks.

If an employee is given a paper paycheck and loses that check, he or she must submit a written request for a new check to be issued to the Executive Director. The request must indicate the date on the check, the pay period it covered, and the amount. The employee must also certify that he or she believes the check to be lost and that if the employee finds the check, he or she will return it to the Financial Consultant. A new paycheck will be issued to the employee as soon as practicable after the request is submitted.

Payroll Tax Compliance

The payroll vendor is responsible for the preparation of the periodic payroll tax filings.

The Financial Consultant is responsible for reviewing and approving all payroll tax documents and supporting schedules for accuracy and completeness.

SCHOOL maintains a schedule of required filing due dates for:

- a. IRS Form W-2 - Wage and Tax Statement.
- b. IRS Form W-3 - Transmittal of Income and Tax Statements.
- c. IRS Form 940 - Employer's Federal Unemployment (FUTA) Tax Return.
- d. IRS Form 941 - Employer's Quarterly Federal Tax Return for Federal Income Tax Withheld from Wages and FICA Taxes.
- e. IRS Form 1099 MISC (also 1099-DIV, 1099-INT, 1099-OID) - U.S. Annual Information Return for Recipients of Miscellaneous Income.
- f. Quarterly and annual state(s) unemployment tax return(s).

CONFIRM REQUIRED FORMS WITH BACK-OFFICE PROVIDER

Periodic Payroll Reconciliations

Reconciling Employee Payroll Deductions

On a monthly basis, the Financial Consultant reconciles deductions made from employees to the payments made to insurers, benefit plan providers, and other payees.

Quarterly Reconciliation of Payroll to Accounting Records

The Payroll Register, the Payroll Register Preview, time sheets for additional work by staff members and expense reimbursements (if any) are filed in Quarterly Payroll binders, according to each pay date by fiscal year. On a quarterly basis, the Financial Consultant performs a reconciliation of all salary accounts in the general ledger, as compared to the salary reported by the payroll processing company on the Form 941 and/or other Quarterly Payroll Return. Any variances are researched and cleared within the month following quarter end.

Annual Reconciliation of Payroll to Accounting Records

On an annual calendar basis, the Financial Consultant performs a reconciliation of the following:

- Gross salaries per all Forms 941
- Gross salaries per W-2 forms
- Gross salaries per General Ledger
- Variances are researched and cleared by January 31 of the following year

Protecting Payroll Information

Salary information constitutes sensitive information. It is the responsibility of the Financial Consultant to ensure that all payroll information is kept secure and confidential. The security of personnel files is described above. In addition, the Financial Consultant will maintain in a locked cabinet the payroll registers that are delivered with pay stubs as well as the vouchers and live checks for those that are not enrolled in the direct deposit program.

Changes to Payroll Information

Changes to personnel data are initiated with a Personnel Action form. This is used when making any changes that affect payroll—new hires, terminations, pay rate changes, or payroll deductions. The Executive Director authorizes any change to payroll data. The payroll vendor processes authorized changes to the payroll data and a copy of the Personnel Action Form is retained in the employee's personnel file.

Terminations and Resignations

The Financial Consultant ensures that any departing employee, whether terminated or resigned, is removed from the payroll immediately after their last payment is made.

Whether an employee has elected to resign or is being terminated, a Personnel Action form must be completed. An exit interview is held between the departing employee, Executive Director, and one witness, usually a member of the school leadership team. In the case of employee termination, a copy of the termination letter is presented to the departing employee at the exit interview. In the case of a resignation, this interview is used to document the departing employee's reasons for resignation. This information is critical when assessing staff turnover data.

Upon termination or effective resignation date, all employee belongings are removed immediately, and all employer belongings are returned immediately. The Personnel Action form is filed in the employee's personnel file.

SCHOOL will pay employees who give proper notice through their last day of employment, unless they are on a leave of absence. Employees will not receive pay for any accrued but unused sick or personal leave (see section below). Employees will receive their final pay according to the normal payroll processing cycle, or in accordance with applicable wage laws.

In the event that a key staff member in finance or operations is incapacitated or terminated, **SCHOOL** will hire a financial consultant to fill in until a permanent replacement is hired. When a replacement is identified, the financial consultant will professionally train the new hire to ensure a sound transition. In addition, **SCHOOL** will continue to develop written desktop procedures for each of these key finance and operations staff positions so that they are not completely reliant on outside consultants.

Sick Leave and Personal Leave

Sick Leave

Employees are entitled to **five (5)** paid sick leave days per school year. Unless otherwise provided for or as approved by the Director of Operations, sick leave is to be used by regular full-time employees in accordance with the following provisions:

- Sick leave is to be used only in the event of illness of the employee, the

employee's immediate family, or someone dependent on them for care, and for no other purpose.

- Misuse of sick leave is cause for termination of employment.
- For the purposes of this section, "immediate family" is defined as a spouse, partner, parent, child, sibling, grandparent, any other relative permanently residing with the employee, or any other person as defined by the Executive Director or the Director of Operations.

Notice of absence from work due to illness should be provided to the Director of Operations and the Executive Director with as much advance notice as possible, and by 6:00 a.m. on the day of the absence, allowing reasonably enough time for the Director of Operations to find a substitute teacher, in the instance of instructional employees, or temporary help, in the instance of administrative staff.

Employees must provide notice of absence from work due to illness each day of their absence. If an employee is absent for three (3) or more consecutive days due to illness or injury, a physician's statement must be provided verifying the illness and its beginning and end dates. When possible, such as in the event of foreseeable extended illnesses and planned medical procedures, advance notice of the use of sick leave should be given to the employee's supervisor at least five (5) days in advance.

Excessive tardiness, absenteeism, or an unauthorized absence may result in disciplinary action, up to and including termination of employment.

Notice of total sick leave used should be provided to the Director of Operations upon an employee's return to work. Sick leave shall be used in increments of one-half workday.

Unused sick leave benefits cannot be carried forward to the next calendar year. Unused sick leave days will not be paid to employees upon termination of employment.

Personal Leave

Unless otherwise provided for or as approved by the Executive Director or the Director of Operations, personal leave for regular full-time employees shall be accrued as follows:

- Each employee is granted **three (3)** paid personal leave days per school year beginning August 1 to be available for use over the following twelve (12) months.
- Employees hired after August 1 in any given year are granted a pro rata portion of the three (3) personal leave days for that twelve (12) month period immediately upon the first day of employment, rounded up to the next highest half-day increment.
- At the end of the year, unused personal leave days will roll over from one year to the next year. At no point, however, may an employee have more than five (5)

total accrued personal leave days. At the end of the year, any unused personal leave days in excess of those five (5) allowed days will be forfeited.

Unused personal leave days will not be paid to employees upon termination of employment.



PROPERTY AND EQUIPMENT

Background

The Director of Operations and the Executive Director are responsible for ensuring that accurate inventories are maintained so that all assets are safeguarded.

The school's Director of Operations is responsible for maintaining the equipment and all necessary asset inventories. All assets must be recorded both in the accounting system's general ledger under the fixed asset category and in a separate fixed asset inventory spreadsheet, created in Excel. All property and equipment subject to the school's Capitalization Policy must be tagged in the manner described below and depreciated according to the school's Depreciation Policy.

Upon receiving any property that qualifies as a fixed asset, the Director of Operations is responsible for recording the following into the fixed asset inventory spreadsheet:

- Inventory number as designated by **SCHOOL** (use sequential numbers, no lettering)
- Asset name and description
- Classification (i.e. land, building, equipment, betterment, leasehold improvements, furniture, computer hardware and software)
- Serial number, model number, or other identification
- Whether title vests with **SCHOOL** or a governmental agency
- Vendor name and acquisition date
- Location of the equipment
- Purchase Date
- Purchase Value
- Disposal Date
- Disposal Reason

In addition, the following data must be entered in the accounting system's general ledger

under the fixed asset category:

- Asset name
- Inventory number
- Current Value

Each item is also physically tagged in a visible area on the item and with the following information:

- Inventory number
- Indication whether the item is property of SCHOOL

All government-furnished property and equipment is also recorded and tagged, with identification information indicating it has been acquired through a government contract. For example, when assets are purchased using funds from the Department of Youth and Community Development (DYCD), that item is tracked and physically tagged as property of DYCD. Because DYCD owns the item, it is recognized as an expense (not an asset) on the balance sheet. In the event of charter revocation, the item is returned as property of DYCD.

No employee may use any of the school property, equipment, material or supplies for personal use without the prior approval of the Executive Director.

No item of property or equipment shall be removed from the premises without prior approval Executive Director.

All lease agreements on real property will be evidenced by a lease or sublease agreement approved by the Board of Trustees and signed by the Executive Director. The agreement will identify all the terms and conditions of the lease. Any real estate agreement to rent or sell will require a beneficial interest disclosure.

Capitalization Policy

The cost threshold for items purchased by SCHOOL to capitalize is \$1,000.00. This allows items over this cost threshold to carry value over time, and not simply be expensed in year one. Items with an acquisition cost of less than \$1,000.00 or a useful life of less than one year are expensed in the year purchased. Items with an acquisition cost of more than \$1,000.00 are subject to the school's depreciation policy, outlined below.

In instances where a large quantity of one single item is purchased, if the total value exceeds the \$1,000.00 threshold, the items may be capitalized. For example, if a school buys 100 desks at \$250.00 per desk, each single item would not meet the threshold. Together, however, these 100 desks have a combined value of \$25,000.00, which should be capitalized over a 7-year period, as outlined in the Depreciation Policy table below.

The Director of Operations performs annual inventory audits, verifying and updating the data contained in the Excel fixed asset inventory spreadsheet. Once complete, this inventory is compared to the fixed assets listed in the general ledger to ensure the value of the assets per the accounting system matches the value of the assets per the spreadsheet. Differences are investigated and reconciled by the Director of Operations.

Depreciation Policy

Any items subject to the Capitalization Policy described above are subject to depreciation. The Director of Operations will account for depreciation based on the school's inventories.

Depreciation associated with the fixed assets will be calculated based on its useful life and straight-line depreciation method. Depreciation is based on the month the item was actually purchased. For instance, if the school purchased a computer in July, it would be depreciated for a full fiscal year (12 months out of 12), and recorded as such. But if the school purchased the computer in April, then it would be depreciated for just one-fourth of the fiscal year (3 months out of 12) because it would only be in service for April, May and June.

Any item that is damaged beyond use will be taken out of service and fully depreciated off the accounting records.

Depreciation Policy	
Computers	4 years
Office/Classroom Equipment	5 years
Office/Classroom Furniture	7 years
Leasehold improvements	Life of lease or 5 years, whichever is greater
Musical Instruments	3 years
Software	3 years

Disposal of Property and Equipment Policy

SCHOOL has adopted standard disposition procedures for staff to follow. The requester fills out and signs the Asset Disposal Form, which identifies the asset and the reason for disposition. This form is submitted to the Director of Operations, who takes photos of the asset, determines the asset's book value and documents the condition of the asset. Disposal of any asset requires the approval of both the Director of Operations and the Executive Director.

Once approved for disposal, the dollar value of the disposed asset is recorded as a reduction in the general ledger. The disposed asset is also removed from the Excel fixed asset inventory spreadsheet. The treatment of any proceeds from the disposition, and the recognition of any gain or loss on sale of the disposed asset, is also recorded in the general ledger by the Director of Operations.

RECORDS RETENTION

Records Retention Policy

All confidential paper records shall be maintained in locked facilities on school premises.

In the event of a major system malfunction, all financial records would be safely maintained in third party internet space via the real-time SOFTWARE PROVIDER backup system. In the event of any other major system malfunction, any transactions since the last available backup would be re-recorded based on the cash disbursement records and cash receipts records.

SCHOOL has an established Disaster Recovery Policy. Please reference the School Safety Plan for details.

The following table provides the minimum requirements for records retention, as mandated by the Washington state statute RCW 40.14.070. CONFIRM LIST BELOW WITH BACK-OFFICE PROVIDER

Item	Retention Period
Bank Statements & Reconciliations	7 Years
Cancelled Checks - (Important Payments - purchases of property, tax payments, large or significant contracts)	Permanent
Cancelled Checks - (Ordinary)	7 Years
Cash Books	Permanent
Cash Receipts and Disbursements	7 Years
Construction Documents	Permanent
Contracts and Leases (Current)	Permanent
Contracts and Leases (Expired)	7 Years
Corporate - Articles of Incorporation & By Laws	Permanent
Corporate - Certificate of Incorporation and Related Legal or Government Documents	Permanent

Corporate - Minutes of Board & Committee Meetings, etc.	Permanent
Correspondence (General)	3 Years
Correspondence (Legal / Important)	Permanent
Duplicate Bank Deposit Slips	3 Years
Email	5 Years
Employee Assignments and Garnishments	7 Years
Employee Benefit Plan Documents	7 Years
Employee Payroll Records	7 Years
Employee Payroll Reports (Federal, State or City Gov't)	7 Years
Employee Personnel Records (After Termination)	7 Years
Employee Personnel Records (Current)	Permanent
Employee Retirement & Pension Records	Permanent
Employee Timesheets	7 Years
Employee Workman's Compensation Documents	11 years
Employment Applications (Current Employees)	Permanent
Employment Applications (Other)	1 Year
Finance - Accounts Payable Ledgers and Schedules	7 Years
Finance - Accounts Receivable Ledgers and Schedules	7 Years
Finance - Audit Reports of Independent Accountants	Permanent
Finance - Chart of Accounts	Permanent
Finance - Depreciation Schedules	Permanent
Finance - Expense Analyses & Distribution Schedules	7 Years
Finance - Financial Statements (inc. Trial Balances)	Permanent
Finance - Fixed Asset Records & Appraisals	Permanent
Finance - General Ledgers	Permanent
Finance - Subsidiary Ledgers	Permanent
Finance - Tax Return Worksheets	7 Years
Finance - Tax Returns	Permanent
Finance - Uncollectible Accounts & Write-offs	7 Years
Finance - W-2 / W-4 / 1099 Forms, etc.	7 Years

Grant Inquiries	7 Years
Insurance - Accident Reports and Claims (Current Cases)	Permanent
Insurance - Accident Reports and Claims (Settled Cases)	Permanent
Insurance - Policies (Current)	Permanent
Insurance - Policies (Expired)	Permanent
Inventories	7 Years
Invoices from Vendors	7 Years
Invoices to Customers	7 Years
Notes Receivable Ledgers	7 Years
Paid Bills & Vouchers	7 Years
Patents & Related Papers	Permanent
Physical Inventory Tags	7 Years
Property Appraisals	Permanent
Property Documents - Deeds, Mortgages, etc.	Permanent
Stock and Bond Certificates (Cancelled)	7 Years
Stock and Bond Records	Permanent
Vendor Payment Request Forms & Supporting Documents	7 Years
Voucher Registers & Schedules	7 Years

Originals of the following corporate documents are maintained on-site and the Financial Consultant verifies their presence on a periodic basis:

- a. Charter and all related amendments
- b. Minutes of the Board of Trustees and subcommittees
- c. Banking agreements
- d. Leases
- e. Insurance policies
- f. Vendor invoices
- g. Grant and contract agreements
- h. Fixed asset inventory list

Records Access Policy

The Financial Consultant will provide access to the organization's records and provide supporting records, as requested by government auditors to facilitate the completion of such audits or reviews, in a timely manner.

Records Destruction Policy

The destruction of confidential school records will be authorized by the Executive Director. Should the Executive Director be unable to provide authorization, destruction will be stayed pending review and final determination.

If any litigation, claim, or audit is started before the expiration of the designated retention period, the records shall be retained until all litigation, claims or audit findings involving the records have been resolved and final action taken.

Once school records have reached the conclusion of their retention period according to the Records Retention Policy the office of origin will request authorization from the Executive Director for their destruction.

The school will arrange for the safe and secure destruction of confidential records. Destruction methods will not permit recovery, reconstruction and/or future use of confidential information. An overview of these methods follows.

Paper records containing confidential information should be shredded and/or pulped, not simply thrown out with other classes of records or with miscellaneous trash.

Electronic or machine-readable records containing confidential information require a two-step process for assured, confidential destruction. Deletion of the contents of digital files and emptying of the desktop "trash" or "waste basket" is the first step. It must be kept in mind, however, that reconstruction and restoration of "deleted" files are quite possible in the hands of computer specialists. With regard to records stored on a "hard drive," it is recommended that commercially available software applications be utilized to remove all data from the storage device. When properly applied, these tools prevent the reconstruction of any data formerly stored on the hard drive. With regard to floppy disks and back-up tapes, it is recommended that these storage devices be physically destroyed.

A destruction record exists to track the destruction of any and all documents. This inventory describes and documents those records, in all formats, authorized for destruction, as well as the date, agent, and method of destruction. The destruction record itself shall not contain confidential information. The destruction record may be retained in paper, electronic, or other formats.

SUMMARY OF ACCOUNT STRUCTURE

Assets

Types of Equity

In non-profit organizations, assets must be classified by nature and segregated between:

1. Unrestricted Net Assets
2. Temporarily Restricted Net Assets
3. Permanently Restricted Net Assets

The school's assets are classified as unrestricted, temporarily restricted, or permanently restricted.

Cash and Cash Equivalents

All cash and cash equivalents of the school consist of cash in the school's bank account/s.

Grants Receivable

Grants receivable include money that the school expects to receive from government or private sources. Donation letters or pledges are also considered grants receivable.

Property and Equipment

Property and equipment includes the assets used by the school for activities and programs that have an estimated useful life longer than one year. For the school, fixed assets primarily consist of musical instruments, classroom equipment, furniture, computers and computer software.

Purchased property and equipment is recorded at cost. Donated property and equipment are recorded at fair market value at the date of donation. Acquisition costs include all costs necessary to bring the asset to its location in working condition, including:

- Sales tax, if any
- Freight
- Installation costs
- Direct and indirect costs, including interest, incurred in construction

Liabilities

Accounts Payable

Accounts payable include costs and expenses that are billed through a vendor invoice, and are recorded at the invoice amount. Vendors and suppliers are paid as their payment terms require, taking advantage of any discounts offered. If cash flow problems exist, payments are made on a greatest dependency/greatest need basis.

Capital Lease Obligation

The school may lease office equipment under a capital lease. In such cases, payments of both principal and interest will be made monthly.

Accrued Liabilities

Salaries, wages earned and payroll taxes, along with professional fees, rent and insurance costs incurred, but unpaid, are reflected as a liability when entitlement to payment occurs.

Debt

When applicable, short-term debt consists of financing expected to be paid within one year of the date of the annual audited financial statements. Long-term debt consists of financing that is not expected to be repaid within one year and is recorded on the balance sheet as a long-term liability. All short-term and long-term debt is approved by the Board of Trustees and may not exceed the duration of the charter, without consent of the Board of Education. Loan agreements approved by the Board of Trustees should be in writing and should specify all applicable terms, including the purpose of the loan, the interest rate, and the repayment schedule.

Per the Statement of Assurances signed in the school's charter application, to the extent it issues secured and unsecured debt, including pledging assigning, or encumbering its assets to be used as collateral for loans or extensions of credit to manage cash flow, improve operations, or finance the acquisition of real property or equipment, **SCHOOL** shall not pledge, assign, or encumber any public funds, such as student enrollment reporting money or local levy money, received or to be received pursuant to RCW 28A.710.220.

Furthermore, the school shall ensure that no debt incurred by the school is a general, special, or moral obligation of the state or any other political subdivision or agency of the state.

Finally, the school shall not pledge either the full faith and credit or the taxing power of the state or any political subdivision or agency of the state for the payment of the debt.

Revenue

Private Contributions

The school receives contributions from individuals, foundations, and corporations in the following forms:

1. ***Unrestricted Contributions:*** No donor-imposed restrictions.
2. ***Temporarily Restricted Contributions:*** Donor-imposed restrictions such as passage of time, or specific use.
3. ***Permanently Restricted Contributions:*** Donor has placed permanent restrictions on the timing of use of funds, purpose of use of funds and/or the use of earnings and appreciation.

Upon receipt of donation, donations are classified as unrestricted, temporarily restricted or permanently restricted.

For further information on the processing of donations, please see chapter 2.

Expenses

Types of Expenses

Expenses are classified by functional classification and are matched with any donor-imposed restrictions.

Functional Classifications:

- a. ***Program Service Expense:*** the direct and indirect costs related to providing education and other services consistent with the school's mission.
- b. ***Management & General Expenses:*** expenses for other activities related to the purpose for which the organization exists. These relate to the overall direction of the organization and include expenses for the activities of the governing board, business management, general record keeping, and budgeting.
- c. ***Fundraising Expenses:*** costs of all activities that constitute appeal for financial support and include costs of personnel, professional consultants, rent, printing, postage, telephone, etc.

The cost of providing the various programs and other activities of SCHOOL will be summarized on a functional basis as part of the school's annual budget process. Accordingly, certain costs will be allocated among the following categories: general education program, special education program, management and general, and fundraising. Allocations are amended as necessary and the rationale documented. The Executive Director, Director of Operations and Financial Consultant are involved in this process.

FRAUD AND MISAPPROPRIATION

SCHOOL will not tolerate any fraud or suspected fraud involving employees, officers or trustees, as well as members, vendors, consultants, contractors, funding sources and/or any other parties with a business relationship with the school. Any investigative activity required will be conducted without regard to the suspected wrongdoer's length of service, position/title, or relationship with the school.

The Executive Director and Board of Trustees are responsible for the detection and prevention of fraud, misappropriations, and other irregularities. Fraud is defined as the intentional, false representation or concealment of a material fact for the purpose of inducing another to act upon it to his or her injury. The Executive Director and each board member will be familiar with the types of improprieties that might occur within his or her area of responsibility, and be alert for any indication of irregularity.

Any fraud that is detected or suspected must be reported immediately to the Board of Trustees and they will take the necessary actions.

Actions Constituting Fraud

The terms fraud, defalcation, misappropriation, and other fiscal irregularities refer to, but are not limited to:

- Any dishonest or fraudulent act
- Forgery or alteration of any document or account belonging to the school
- Forgery or alteration of a check, bank draft, or any other financial document
- Misappropriation of funds, supplies, equipment, or other assets of the school
- Impropriety in the handling or reporting of money or financial transactions
- Disclosing confidential and proprietary information to outside parties
- Accepting or seeking anything of material value from contractors, vendors, or persons providing goods or services the school
- Destruction, removal or inappropriate use of records, furniture, fixtures, and equipment
- Any similar or related irregularity

Investigation Responsibilities

The Board Chairperson has the primary responsibility for the investigation of all suspected fraudulent acts as defined in the policy. The Board of Trustees may utilize

whatever internal and/or external resources it considers necessary in conducting an investigation. If an investigation substantiates that fraudulent activities have occurred, the Board of Trustees will issue reports to appropriate designated personnel.

Decisions to prosecute or refer the examination results to the appropriate law enforcement and/or regulatory agencies for independent investigation will be made in conjunction with legal counsel and senior management, as will final dispositions of the case.

Confidentiality

The Board of Trustees will treat all information received confidentially. Any employee who suspects dishonest or fraudulent activity will notify the Board Chair immediately, and should not attempt to personally conduct investigations or interviews/interrogations related to any suspected fraudulent act.

Investigation results will not be disclosed or discussed with anyone other than those who have a legitimate need to know. This is important in order to avoid damaging the reputations of persons suspected but subsequently found innocent of wrongful conduct and to protect the school from potential civil liability.

Authority for Investigation of Suspected Fraud

Members of the Board of Trustees will have:

1. Free and unrestricted access to all the school's records and premises; and
2. The authority to examine, copy, and/or remove all or any portion of the contents of files, desks, cabinets, and other storage facilities on the premises without prior knowledge or consent of any individual who may use or have custody of any such items or facilities when it is within the scope of their investigations.

Reporting Procedures

An employee who discovers or suspects fraudulent activity will contact the Chairperson of the Board of Trustees immediately. The employee or other complainant may remain anonymous. All inquiries concerning the activity under investigation from the suspected individual(s), his or her attorney or representative(s), or any other inquirer should be directed to the Finance Committee or legal counsel. No information concerning the status of an investigation will be given out. The proper response to any inquiry is, "I am not at liberty to discuss this matter." Under no circumstances should any reference be made to "the allegation," "the crime," "the fraud," "the forgery," "the misappropriation," or any other specific reference.

The reporting individual should be informed of the following:

1. Do not contact the suspected individual in an effort to determine facts or demand restitution.

2. Do not discuss the case, facts, suspicions, or allegations with anyone unless specifically asked to do so by the appointed legal counsel or the Board of Trustees.



WHISTLEBLOWER POLICY

SCHOOL requires employees to observe high standards of business and personal ethics in the conduct of their duties and responsibilities. Employees and representatives of the school are expected to practice honesty and integrity in fulfilling their responsibilities and are expected to comply with all applicable laws and regulations.

It is the responsibility of all employees to report violations of ethics or conduct or suspected violations in accordance with this Whistleblower Policy.

No employee who in good faith reports a violation shall suffer harassment, retaliation or adverse employment consequence. An employee who retaliates against someone who has reported a violation in good faith is subject to discipline up to and including termination of employment. This Whistleblower Policy is intended to encourage and enable employees and others to raise serious concerns within the school prior to seeking resolution outside the school.

Anyone filing a complaint concerning a violation or suspected violation must be acting in good faith and have reasonable grounds for believing the information disclosed indicates a violation. Any allegations that prove not to be substantiated and which prove to have been made maliciously or knowingly to be false will be viewed as a serious disciplinary offense.

Violations or suspected violations may be submitted on a confidential basis by the complainant or may be submitted anonymously. Reports of violations or suspected violations will be kept confidential to the extent possible, consistent with the need to conduct an adequate investigation.

The Executive Director will notify the sender and acknowledge receipt of the reported violation or suspected violation within five business days. All reports will be promptly investigated and appropriate corrective action will be taken if warranted by the investigation.

Checklist of Financial Responsibility Breakdown for the Business Dept., School Leadership Team, Finance Committee and Board of Trustees

Financial Responsibilities	Business Dept.	School Leadership Team	Finance Committee	Board of Trustees
Financial Policies & Procedures Manual	Establish, document, enforce & follow internal controls in manual	Understand, enforce & follow procedures	Review/provide feedback on manual	Vote upon critical policies in manual/entire manual
Opening and Closing of Bank Accounts	Recommend which bank accounts should exist & why	Understand which accounts exist & why	Recommend opening / closure of accounts	Vote upon and Record in Board Meeting Minutes
Selection of Independent Auditors	Obtain list of/meet with auditors experienced with charter schools	Support Business Dept. with review of Auditors	Review/recommend Auditors to Board	Vote upon Recommended Auditors
Knowledge of Sources of Revenue Streams / Drivers and Related Cash Flows	Meet with existing schools/qualified consultants and review all available documentation and requirements from Authorizer	Build intimate knowledge of drivers of revenues and related cash flows	Build intimate knowledge of drivers of revenues and related cash flows	Attend Training by Qualified Consultants/ Business Leader and ask Pertinent Questions
General Education and SPED Student Enrollment Count	Track Budget vs. Actual for General Education & SPED Student Enrollment as it changes	Communicate Headcount to Business Leader as it changes	Review Headcount at Every Finance Committee Meeting	Review Budget vs. Actual for Enrollment/Fin'l Impact at Every Board Meeting
Annual/Multi-Year Budgets	Create Budgets reflecting School's Vision; repeat until balanced	Support Business Leader with Creation of Budgets	Review with School & Business Leaders	Review and Vote Upon Prior to end of Fiscal Year
Organizational / Staff & Salary Structure each School Year	Create Structure, Salary / Bonus (if applicable) Rubric with School Leader	Create Structure, Salary / Bonus (if appl.) Rubric w/ Business Leader	Review Structure, Salary / Bonus (if applicable) Rubric Annually	Review Structure incl. Added & Eliminated Positions Annually
Establishment and Annual Renewal of School-wide Insurance and Benefits Packages	Obtain/compare multiple quotes for School-wide Policies & Benefits Packages and confirm they are competitive & compliant	Review School-wide Policies & Benefits Packages Presented by Business Leader	Review School-wide Policies & Benefits Packages Presented by Business Leader	Confirm if School is Adequately Insured and offering Competitive / Fairly Priced Benefits
Financial Reporting including Accrual-Based and Cash-Based Projections	Create Monthly Reports and develop Projections with School Leader's input of which line items may be under/over budget	Support Completion of Reports and Projections Prepared by Business Leader	Review Reports / Projections Prepared by School & Business Leaders	Review Key Variances on a Quarterly Basis and Discuss Major Variances in Advance
Audited Financial Statements	Prepare for audit throughout the fiscal year & provide auditors w/ all requested schedules/analyses	Support preparation of Highlights of Statements w/ Business Leader	Prepare Key Highlights of Statements with School & Business Leaders	Review Key Highlights Prepared by Finance Committee
Management Letter that accompanies Audited Financial Statements	Prepare plan for and implement all Remedies for Recommendations by Auditors in Management Letter	Hold Business Leader Accountable for Implementing Remedies for Recommendations	Hold School & Business Leaders Accountable for Implementing Remedies for Recommendations	Review all Observations & Recommendations by Auditors and Responses by Management
Form 990 Tax Returns	Provide auditors w/all requested info to complete 990s ; confirm extensions are filed if necessary	Review & Sign Off on 990s prior to submission by Auditors	Review & Sign Off on 990s prior to submission by Auditors	Review 990s after review by Finance Committee and Prior to Submission
Charter Renewal Requirements per Authorizer	Have intimate knowledge of all Academic & Financial Requirements per Charter Authorizer	Have intimate knowledge of all Academic & Financial Requirements	Have intimate knowledge of all Financial Requirements	Have intimate knowledge of all Academic & Financial Requirements



Catalyst: Bremerton

Section 27: Attachment 28

Contents:

- Budget Narrative

Attachment 28: Budget Narrative

The attached five-year budget and Year 1 cash flow projections reflect the estimates of actual revenue and costs to implement Catalyst: Bremerton as described above in the application. All assumptions represent the best knowledge of revenues and expenses at the time of submitting this application.

Catalyst: Bremerton collaborated with WA Charters, Noah Wepman, former Senior Program Officer at the Bill & Melinda Gates Foundation, currently the Chief Financial and Growth Officer at New Leaders, to advise and consult in the development of accurately projected revenues, expenses, and cash flow. In addition, the Catalyst: Bremerton team reviewed previously created benchmarks for charters nationally and in Washington State by EdTec, a social venture founded in 2001 to develop, support, and advance quality charter schools. As well, comps for revenue and expenses for current operating charters in WA State were considered and OPSI data.

This narrative describes the assumptions on which the budget and cash flow are based. Catalyst: Bremerton is committed to being financially sustainable and academically excellent. While the proposed budget relies on many variables both within and outside the school's control, all decisions will be made with these financial and academic goals in mind. The budget reflects a positive operating income for the five-year period and a strong fund balance. The school is sustainable on the public dollar in its second year of operation.

Demographics

Catalyst: Bremerton will open in the 2020-2021 school year with 224 scholars in grades K, 1, 5, and 6. In Year 1, these grades will be fully enrolled at 56 scholars per grade. In Year 2, Catalyst: Bremerton grows to serve 336 scholars, with 56 scholars per grade, adding grades 2 and 7. In Year 3, Catalyst: Bremerton grows to serve 448 scholars, with 56 scholars per grade, adding grades 3 and 8. In Year 4, the school is fully enrolled across all grades K-8, with 56 scholars per grade level. Total enrollment in Year 4 and beyond is 504.

Catalyst: Bremerton is open to all scholars consistent with RCW 28A.710.050 and anticipates serving a high number of low-income scholars, scholars with disabilities, and scholars of color.

Catalyst: Bremerton is assumed to have the following demographics:

- 95% Average Daily Membership
- 95% Average Daily Attendance
- 16% Special Education Scholars
- 6% English Language Learners and Transitional Bilingual (TBIP)
- 40% Qualifying for Free Lunch
- 25% Qualifying for Reduced Lunch
- 65% Learning Assistance Program (LAP)
- 5% Highly Capable

- 50% Participation in transportation program

A. Anticipated Funding Sources and Expenditure Assumptions

State Apportionment:

Catalyst: Bremerton's revenue assumptions for the 2020-21 school year are based off the follow assumptions:

2020-21 State Funding Assumptions (per qualifying pupil)	Source
General Apportionment = Year 1: \$9,538.20 Year 2: \$9,729.62 Year 3: \$9,925.51 Year 4: \$9,958.73 Year 5: \$10,157.90 Note: Revenue is adjusted with 2% inflation each year.	OSPI Budget Estimator Tool in Commission Budget Template
State Special Education = \$8,873	Commission-Published Estimated Pupil Application Worksheet 2019-2020
Learning Assistance = \$954	Commission-Published Estimated Pupil Application Worksheet 2019-2020
Transitional Bilingual = \$1,295	Commission-Published Estimated Pupil Application Worksheet 2019-2020
Highly Capable = \$590	Commission-Published Estimated Pupil Application Worksheet 2019-2020
Transportation Operations = \$526	Commission-Published Estimated Pupil Application Worksheet 2019-2020

In Years 2-5 of operation all state revenue is estimated to grow at 2%. This estimate, while potentially conservative, is in line with the state's adoption of the Implicit Price Deflator (IPD) inflation factor and was deemed appropriate by T.J. Kelly, Director School Apportionment and Financial Services at the Office of Superintendents of Public Instruction (OSPI).

Total estimated state funding in Year 1 of operation with 226 scholars is \$2,557,140.00. In Year 5, Catalyst: Bremerton's second year at full enrollment of 504 scholars, state funding is expected to be \$6,482,742.

Federal Revenue:

Catalyst: Bremerton worked with Noah Wepman, former Senior Program Officer of the Bill & Melinda Gates Foundation, currently the Chief Financial and Growth Officer at New Leaders, to develop budget assumptions for federal revenue. In addition, the Catalyst: Bremerton team consulted benchmarks previously created for charters nationally and in Washington State by EdTec and OPSI data. Based on this review, Catalyst: Bremerton anticipates the per pupil federal revenue noted below in school year 2020-21.

School Year 2020-21 Per Pupil Federal Funding Assumptions	
Title I = \$320.00	
Title II = \$50.00	
Title III = \$70.00	
IDEA Funding = \$1,300.00	
School Food Services = \$492.51	

These funding assumptions are based off other charter and traditional public schools per pupil federal revenue with similar enrollment and populations. All per pupil federal funding assumptions grow by 1% in operating Years 2-5.

Total estimated federal funding Year 1 of operation with 226 scholars is \$194,255. In Year 5, Catalyst: Bremerton's second year at full enrollment of 504 scholars, state funding is expected to be \$502,547.

Other Revenue:

Catalyst: Bremerton's budget includes all grants that have been solicited, grants that will be solicited at the time of application submission, and grants that are not applied for but which Catalyst: Bremerton is a competitive candidate for or are considered highly likely upon authorization. The table below outlines the funding entity, amount, period, and commitment status.

Funding Entity	Amount	Period	Commitment
Washington State Charter Schools Associations	\$200,000	Start-Up Year	Committed, pending authorization. Included in the financial workbook.
Washington State Charter Schools Associations	\$400,000	Year 1 of Operation	Committed, pending authorization. Included in the financial workbook.
Charter School Program Grant	\$200,000	Start-Up Year	Applied and awaiting decision. Included in financial workbook.
New Schools Venture Fund	\$200,000	Start-Up Year	Applied and awaiting decision. Included in financial workbook.
New Schools Venture Fund	\$300,000	Year 1 of Operation	Applied and awaiting decision. Included in financial workbook.

The cash flow contingencies section discusses and reviews impact to net income and cash flow should some or all these grants not be awarded.

Expenses

Staffing

All dollar amounts listed in this section are in 2020-21 dollars unless otherwise notes. Salaries increase annually at a 3% COLA.

Staffing described below is in line with the staffing matrix completed in the five-year budget template. Salaries consider average salaries in the Bremerton School District and surrounding school districts.

In Year 1 Catalyst: Bremerton's leadership team is comprised of the school's two co-founders. One co-founder will act as the head of the elementary school and will perform duties typical of a Chief Academic Officer. The other co-founder will act as the head of the middle school and will perform duties typical of a Chief Executive Officer. The administrative team also includes a Family/Community Engagement Manager, a Director of Finance and Operations, and an Office Manager.

Additional positions in Year 1 include eight Lead Teachers, six Small Group Instructors (three of whom will be fully certified and three who will be teaching assistants), one Special Education teacher, one Special Education/ELL aide, and two Teachers in Training.

In Year 3, the school co-founders, the Family/Community Engagement Manager, and the Director of Finance and Operations will move to the CMO office. Concurrently, a school principal and an assistant principal/learning specialist and an operations and business manager will be hired to be on site at the school.

When fully enrolled in Year 4 and beyond, the school will have the following staff positions:

- Principal (1)
- Operations and Business Manager (1)
- Assistant Principal/Learning Specialist (1)
- Lead Teachers (18)
- Small Group Instructors (14)
- Special Education Teachers (3)
- Special Education/ELL Aides (1)
- Office Manager (1)
- Teachers in Training (4)

Benefits

Health insurance (including dental, vision, life, etc.) is budgeted at \$5,450 per full-time eligible employee, growing at 12% per year. Retirement assumptions reflect 15.41% of certificated payroll and 13.58% of classified payroll, based on published amounts effective September 1, 2018. All employees are presumed to pay into social security at 6.2% and Medicare at 1.45%. The budget also assumes state unemployment insurance at 2.5% per the first \$47,300 of pay per person, based on the 2018 taxable wage base. Worker's Compensation, or Labor & Industries, is estimated to be 2% of payroll. Total benefits in Year 1 of operation are \$500,050 and are 35% of payroll.

Custom Contracted Services

All contracted services are budgeted to increase at 3% per year. Contracted services include:

- \$17,000 for the school's financial audit and SAO audit
- \$10,000 is budgeted for legal costs
- 3% of total revenue is budgeted for the Commission's oversight fee
- \$5,000 is budgeted for school nurse services. These services will likely be provided by the Olympic Educational Services District (OESD)
- \$75 per student is budgeted for food service and school lunch costs to set up operation
- \$150,000 is budgeted for special education services, which will likely be provided by OESD and/or Seneca Family of Agencies

- \$12,000 is budgeted for membership in the True Measure Collaborative, to receive professional development and related services for serving the needs of diverse scholars.
- \$60,000 is budgeted for back-office support, which will likely be provided by OESD. This support will include budget planning, payroll, accounts receivable, etc.
- \$5/scholar is budgeted for membership to the Washington Charter Schools Association, which provides technical support to charter schools around their educational programming and operational models.

In Year 3 of operations the CMO home office will be established. At this point the school will begin paying a management company fee equal to 10% of the school's revenue. Accounting/audit, legal, and back office services will all be provided to the school by the CMO staff at this point. In addition, certain administrative staff will transition to the CMO home office in Year 3.

School Operations

Operating expenses and costs are estimated using WA State charter sector benchmarks and previous EdTec national and WA State charter sector benchmarks. Catalyst: Bremerton assumes \$495,492 for school operations in Year 1 in the following categories. Each category will increase by 3% per year unless noted otherwise below.

- Board Expenses = \$2,500 per school year to cover board governance training, background checks, retreat costs, etc.
- Classroom/Teaching Supplies and Materials = \$69,664 to cover classroom materials and supplies, classroom libraries, and elective materials.
- Special Education Supplies and Materials = this cost is included in classroom/teaching supplies and materials.
- Textbooks and Workbooks = this cost is included in classroom/teaching supplies and materials.
- Supplies/Materials – Other = \$7 per scholar has been budgeted for postage.
- Equipment and Furniture = \$60,000 per year to cover the cost of classroom furniture needed in the first year. The amount budgeted in future years mirrors the changes in enrollment anticipated.
- Telephone = \$10 per scholar
- Technology = \$61,420 has been budgeted to cover the costs of scholar-used technology, including Chromebooks and iPads. The expense is reduced in future years based on changes in enrollment as the school grows.
- Student Testing and Assessment = \$30 per student to cover school-wide assessments such as NWEA Map Growth and STEP
- Field Trips = \$25 per scholar

- Transportation = \$736.40 per scholar representing a 40% loss against revenue; at capacity it is expected that the program will gain efficiency and operate at a 20% loss
- Office Expenses = \$10,000 to cover office supplies and materials for school administration/leadership
- Staff Development = \$5,000 budgeted to cover materials needed for school leadership team to provide development to staff and/ or for conference participation, as needed.
- Student Recruitment and Marketing = \$8,000 budgeted for recruitment materials and collateral needed
- School Meals/Lunch = \$486.72 budgeted for food service contract
- Software Licenses = \$125 per scholar budgeted for online learning programs for scholar learning
- Student Information System = \$7,710 budgeted for the school. This expense is reduced in future years based on changes in enrollment as the school grows.
- Technology for Staff = \$32,000 budgeted for staff laptops, iPads and cell phones for select staff needed for instructional models. The expense is reduced in future years based on changes in personnel as the school grows.

Facilities Operations and Maintenance

Catalyst: Bremerton has not identified a facility at this time. Therefore, many of the budget allocations for this section are based on estimates of current charter school costs in Washington State. In addition, Catalyst: Bremerton is intentionally using estimates on the high side for rent and maintenance to ensure enough room in the budget given that a facility has not yet been identified. The estimated total for Facilities Operations and Maintenance for Year 1 is \$460,656 and includes the following:

- Insurance = \$119 per student
- Janitorial = \$250 per student with budgeted amount decreasing in future years based on enrollment
- Building and Land Rent/Lease = \$275,000 budgeted in the first year, assuming that we occupy a facility that will accommodate the school in its first two years of operation. In Year 3, we have increased this line item in anticipation of moving into a larger, more permanent home that would accommodate the school at full capacity. Rent assumptions are based on rent and enrollment of current charters in Washington State, while also erring on the side of being too high rather than too low.
- Repairs and Maintenance = \$20,000 per year
- Equipment/Furniture = \$18,000 is budgeted to cover equipment and furniture needed to set up school administrative offices in the first year and any additional furniture needed in future years.

- Security Services = \$10,000
- Utilities = \$40,000
- Internet and Website Development: \$20,000

Start-Up Expenses

The expenses outlined below will be incurred before the start of the first operating year. Catalyst: Bremerton's start-up budget is based on a \$200,000 grant from the Washington State Charter Schools Association for the 2019-2020 academic year, a \$200,000 CSP grant and a \$215,000 start-up grant from New Schools Venture Fund.

Expenses include:

- School Co-Founders = \$130,000 each. One co-founder will lead work related to school operations including fundraising and facilities acquisition. The other co-founder will lead the development of the academic model and program as well as leading student and staff recruitment.
- Community Engagement Coordinator = \$50,000. This person will support our community engagement and recruitment efforts.
- Office Manager = \$26,667. Prorated salary for 8 months.
- Director of Finance and Operations = \$60,000. Prorated salary for 8 months.
- Payroll Taxes and Benefits = \$124,760, calculated based on the rates noted above under Benefits.
- Legal = \$5,000
- Back Office Services = \$30,000
- Board Expenses: \$1,000
- Technology: \$10,000
- Office Expenses: \$8,000
- Staff Development = \$5,000
- Staff Recruitment = \$15,000
- Student Recruitment = \$15,000

The expenses total \$608,464, leaving a net operating income of \$6,836.

Cash Flow

The cash flow projection below is for: 1) the start-up period of March 2020 through August 2020; and 2) the first year of operation, September 2020 through August 2021. Details regarding revenue and expenses for the start-up period are outlined above. For the first operating year, state revenue is based on the OSPI payment schedule, with a predetermined monthly percentage. Expenses are aligned to the experiences of similar charter schools. Most expenses have been distributed equally over the first year, providing a monthly target for tracking

purposes. Salaries and Benefits are projected on a 12-month basis. Federal funding (both general and special purpose) has been projected with the initial payment arriving in October.

b. Contingency Planning

Revenue Shortfalls

If there are revenue sources that do not materialize or if revenues are less than projected, Catalyst: Bremerton will make necessary reductions, focused on staffing, to ensure that the school is financially sustainable while still providing an academically rigorous experience and the necessary services to scholars. Included in the cash flow contingency is a table outline the changes in net income Catalyst: Bremerton would expect based on the budget if specific grant funding is not awarded. In addition, at the time of this submission, Catalyst: Bremerton's contingency plan is based on the following assumptions:

- There will not be a loss of public funding: On the public revenue side, all sources of funding are highly likely, so any loss in public funding would likely be due to a loss in enrollment, which would result in associated and appropriate expense cuts.
- Catalyst: Bremerton does not foresee a large and unexpected increase in expenses: Catalyst: Bremerton's expenses are based on the experiences of similar charter schools in Washington as reviewed previously by EdTec and currently by WA Charters. In addition, Noah Wepman and Amy Kiyota, Catalyst Board member, have been consulted on expenses. Therefore, Catalyst: Bremerton believes the expenses to be reasonable estimates at this time based on the best information available.

Year 1 Cash-Flow Contingency

Catalyst: Bremerton has applied for and hopes to receive a CSP grant, a New Schools Venture Fund (NSVF) grant, and a Washington Charter School Association start-up grant.

In the first year of operations, the school anticipates receiving a \$400,000 grant from Washington Charter School Association and a \$300,000 launch grant from New Schools Venture Fund. Catalyst: Bremerton is also applying for CSP funding for the first two years of operation and is in the due diligence process with Charter School Growth Fund for additional funding, although these funds are not included in the submitted budget. Catalyst: Bremerton knows that these grants are competitive that at submission of this application funding from these grants is not guaranteed. WA Charters grants in Years 0 and 1 are considered highly likely if authorized.

Public revenue is considered highly likely and Catalyst: Bremerton does not expect to lose access to public revenue streams. Enrollment, or loss thereof, will have the biggest impact on public revenue during the school year.

Should Catalyst: Bremerton not receive CSP and NSVF funding in our planning year WA Charters has indicated the ability to advance up to \$200,000, depending on budget needs, from Catalyst:

Bremerton's Year 1 \$400,000 grant. Catalyst: Bremerton is confident in its ability to have a strong planning year with these resources available and under these circumstances, Catalyst: Bremerton would reduce payroll by bringing on administrative staff such as the DFO/ DOO and others for 4-6 months prior to opening rather than eight months. The purpose of this advance would be to fund purchase of technology, curriculum, and other similar needs prior to the start of school. This advance would reduce Year 1 net income and thus the fund balance in Year 1 and all out years by \$200,000. Even under these circumstances, Catalyst: Bremerton would still be building a positive fund balance across its first five years of operation.

In addition, as discussed in the expense section above, expenses are both conservative and where possible estimated on the high end. Should cash flow become a challenge, Catalyst: Bremerton would consider expense cuts, strategic fundraising, vendor management, or short-term loans. Expense cuts would mostly be considered in the event of enrollment loss. Fundraising in this situation would be focused on raising to cover any short-term gaps in cash flow. Catalyst: Bremerton plans to maintain friendly vendor relationships throughout the year to prepare for the unlikely situation that the Charter School needs to hold any vendor payments to make payroll and cover the gap until the apportionment is received at the end of the month.



Catalyst: Bremerton

Section 27: Attachment 29

Contents:

- Letter of Funding Support from the Washington State Charter Schools Association
- Charter School Growth Fund Letter of Support
- New Schools Venture Fund Letter of Support



Washington State Charter Schools Association

210 S Hudson St, Suite 324 | Seattle, WA 98134

206.832.8505 | info@wacharters.org

March 1, 2019

Ms. Cindi Williams, Chairperson
Washington State Charter School Commission
P.O. Box 40996
Olympia, WA 98504-0996

Dear Chair Williams and Members of the Commission:

The Washington State Charter Schools Association (WA Charters) is an advocacy and professional membership organization that is working determinedly to grow a high-quality charter public school sector across the state of Washington. Through strategic sector-wide communications, advocacy, and school incubation and support, we advocate for and support high-quality charter public schools that meet the needs of systemically underserved students. Through our School Leadership and Design Fellowship (SLDF), WA Charters partners with talented leaders and community-based organizations to design charter public schools that are responsive to the communities in which they locate.

To demonstrate our commitment to supporting the launch of successful schools in communities across the state, WA Charters has created a competitive grant program to support the startup of new independent charter public schools. Since its inception in 2014, this grant program has funded nine different independent startup charter public school models through both Planning and Implementation Grants. These initial grants totaled approximately \$5.4 million and will have created more than 3,800 high-quality charter school seats once schools reach full enrollment. Each independent charter public school that is authorized to operate in Washington state is eligible to apply for this funding, and to date, each one has received WA Charters Planning and Implementation commitments totaling up to \$600,000.

While grant funds cannot be guaranteed prior to approval, the **Catalyst: Bremerton** leadership team, if authorized, will continue to receive intensive academic, organizational, and financial support from WA Charters over the course of their startup year (July 2019 – June 2020) to prepare for a successful school opening. Supports include participation in WA Charters' Strong Start Program, in which they will attend monthly retreats, get personalized coaching, and will receive a Planning grant to hire additional staff, continue the development of their academic model, and fund other startup-related costs.

Support will focus on best practices in many specific areas: state and federal compliance and reporting, meeting authorizer pre-opening conditions, instructional leadership, school-based operations, data and assessment systems, board governance, human capital management, community engagement, serving special populations of students (e.g. those with disabilities and English Language Learners), facilities, budgeting, and school finance. WA Charters partners with local and national experts to deliver trainings, including, but not limited to: Washington Charter School Development, the Office of the Superintendent for Public Instruction, and Seneca Family of Agencies. Once launched and serving students, **Catalyst: Bremerton** will be eligible for WA Charters' Implementation Grant.

Because of our deep belief in their capacity to deliver on a rigorous, high-quality school, WA Charters is committed to continuing to support and invest in Amanda Gardner, Tatiana Epanchin, and other members of their design team and board of directors throughout the start-up phase and beyond to launch **Catalyst: Bremerton**.

Respectfully yours,

A handwritten signature in black ink, appearing to read 'Pat D'.

Patrick D'Amelio
CEO, WA Charters

February 21, 2019

Ms. Cindi Williams, Chair

Washington State Charter School Commission

P.O. Box 40996

Olympia, WA 98504-0996

Dear Chair Williams and Members of the Commission,

I am writing to personally express my strong support for the Catalyst Public Schools charter application. As a Principal at Charter School Growth Fund and a national supporter of high-performing charter schools, my job is to identify patterns in successful charter leaders, teams, and academic models. The most successful schools we support are created by teams of seasoned educators with a combination of prior experience launching and running high-performing schools and senior leadership experience at other top-tier organizations. Having already successfully navigated the complexities of launching multiple charter schools, Mrs. Gardner and Mrs. Epanchin will be able to sidestep many common challenges and focus on creating an outstanding education option for the students and families of Bremerton.

My colleague Elena Sanina worked with Mrs. Epanchin at Aspire and reflected on her leadership as follows:

I have known Tatiana Epanchin in multiple contexts over the past 7 years and can personally attest to her community-centered leadership, her effective management, and her commitment to academic excellence. As a colleague of hers at Aspire Public Schools in Oakland, CA, I watched Tatiana lead the Bay Area region and create the conditions for steady API growth in which her schools outperformed local district schools. The organization's average API in the year she left was an 816. She had a community-first mentality, always inspiring the district office staff to think about equity and accessibility for families. She was beloved by the principals that she managed and she led with conviction when she engaged home office stakeholders in key decisions. Part of Tatiana's credibility as a Regional Superintendent came from her work launching a new school, Aspire ERES Academy. As a school leader, she emphasized student safety, academic results, and a community-oriented collaborative staff culture. Years after Tatiana's departure from that school leadership role, I had the chance to work closely with Aspire ERES Academy on a new initiative and teachers were still recollecting memories of how Tatiana supported them with instructional effectiveness and standards-based instruction. Since our days at Aspire, Tatiana and I have kept in touch and I've had the privilege to watch her start School Leader Lab, an organization that closely resembles the essence of the type of leader Tatiana is – someone that believes in the potential of equity-minded, collaborative adult leaders and their power to deliver high-quality educational opportunities to all students.

I am inspired by the vision of Catalyst Public Schools and the lasting multi-generational change it can create for students and families in Bremerton. Thank you for supporting great schools and educational options for the children of Washington. Please contact me if you have any questions or if I can provide additional information.

Sincerely,

Ian Connell

Ian Connell

Principal

Charter School Growth Fund

iconnell@charterschoolgrowthfund.org

CSGF TEAM		Contact Information						
Ian Connell		iconnell@chartergrowthfund.org						
Ryan Rodrigues		rrodrigues@chartergrowthfund.org						
Resources								
Box Folder								
Timeline								
May 31st (or Earlier)		CSGF Go / No-go Decision						
Diligence Stages	Diligence Details	Description	Timing	Status				
1) Artifact Review	Completed Virtually	Focus on "gating" factors - review financial model and school launch analysis; prior academic success	March, early April	Not Started				
2) Deep Dive	Onsite Visit	Deep dive conversations focusing on launch plan, team, central office	4/29 - 5/1	Not Started				
1) Artifact Review								
Diligence Area	CSGF Goal	Artifact	Timeline	File Format	Submitted (Y/N)	Notes	Folder	
Financial Model	Understand the total operating need/ working capital/philanthropic need; Evaluate financial sustainability	Catalyst's detailed financial model including school-level & Central Office (if applicable)	Current	Excel	N	Catalyst to submit		1
Student Discipline Data	Evaluate student discipline policies	Student/Parent Handbook	Current	open	N	Catalyst to submit		2
Academic Data	Conduct diligence on previous academic result	NWEA MAP Data and/or State test data from Aspire and Boston Prep during tenure at each school	Historical	open	N	Catalyst to submit		3.1
Academic Model	Understand key innvoation of the academic model	Academic Model/Theory of Change / Curriculum	Current	open	N	Catalyst to submit		3.2
Human Capital	Understand Staffing Needs	Projected hiring needs and pipeline for next 24 months (Org chart now and future)	Current	open	N	Catalyst to submit		4
Launch Plan	Understand greenlighting/school opening process, target market analysis, advocacy and parent engagement, central office functions, governance etc.	Business Plan (Will provide example via email)	Current	Typically PPT or PDF	N	Catalyst to submit		5
Fundraising	Understand fundraising progress	CSGF Fundraising Template (current and future projections)	Current		N	Catalyst to submit		6
Facilities/Ops	Understand path to facilities short-term and long-term	Facilities Description and plans for current and future schools (i.e., are facilities temporary / permanent; leased vs. purchased; etc.)	Current	open	N	Catalyst to submit		7
Leadership / Board	Understand Board makeup and what is reported/important to them	Bios of board members / Exec team	Current	open	N	Catalyst to submit		8.1
		Key Board Materials (i.e. strategic planning / budgeting / academic model updates)	Current	open	N	Catalyst to submit		8.2
		List of board committees and materials (if applicable)	Current	open	N	Catalyst to submit		8.3
		Management Dashboards not in board materials	Current	open	N	Catalyst to submit		8.4
CEO Background	Gather more context about prior experiences	Three professional references (2 - Sr , 1 - Jr)	Current	open	N	Catalyst to submit		9
Percent % Complete					0%			

2) Deep Dive							
Diligence Area	Catalyst Role	CSGF Role					
Leadership Team	Help schedule onsite visit with senior leadership team and key board members.	Meets with Catalyst senior leadership team / key board members.					
Board Meeting	Help to schedule CSGF board meeting observation	Observe board meeting and dynamics. Observe board committee meeting of risk areas					



February 26, 2019

Ms. Cindi Williams, Chair
Washington State Charter School Commission
P.O. Box 40996
Olympia, WA 98504-0996

Dear Chair Williams and Members of the Commission,

NewSchools Venture Fund (NewSchools) submits this letter in support of the application of Catalyst Public Schools (Catalyst) for charter authorization.

As a national nonprofit, NewSchools uses the charitable donations we receive to support education entrepreneurs who are reimagining PK-12 education to create great results for all students. NewSchools is known for identifying and supporting some of the highest impact education entrepreneurs in the field over the last twenty years.

Through our current strategy, we provide funding and support for teams of educators with ambitious plans to open new innovative public schools. These schools reimagine the learning experience for students, particularly those who have been traditionally underserved. We are impressed by the track record of the founding team, Amanda Gardner and Tatiana Epanchin, and are compelled by their plans to build a strong school to meet the needs of diverse learners in Bremerton, WA. As such, we plan to fund Catalyst Public Schools with a \$215,000 planning grant, pending final internal approval, to support the design and development of their school. Catalyst will be eligible for a larger, multi-year grant in 2020 when they have – amongst other requirements – secured a charter and a facility, developed an instructional program that personalizes student learning, and hired key staff members. NewSchools believes in Catalyst's leadership and ability to meet these requirements.

We highly recommend the Catalyst team for approval and hope you will authorize them to create a great school for the students in Bremerton.

Sincerely,

A handwritten signature in black ink that reads "Frances Messano".

Frances Messano
Senior Managing Partner



Catalyst: Bremerton

Section 27: Attachment 30

Contents:

- Fundraising Plan

Section 27: Attachment 30

CATALYST: BREMERTON FUNDRAISING PLAN

Catalyst: Bremerton is committed to being sustainable off of per-pupil revenue by Year 4 of operations when the school will be fully enrolled. Below is our strategy to securing the start-up funds needed to launch the school.

Catalyst co-founder, Amanda Gardner, will lead fundraising efforts for the school and Charter Management Organization office, once launched, with support of the Catalyst Board. Ms. Gardner has experience with donor cultivation and fundraising. While the VP, Schools at Innovate Public Schools Ms. Gardner assisted the CEO to cultivate relationships with donors and philanthropic organizations to support the organization's ~\$7M annual operating budget. Additionally Ms. Gardner founded and led Innovate's Charter School Entrepreneur-in-Residence Program (EIR), a charter management organization incubator. Ms. Gardner partnered with Innovate's CEO to raise \$3.5M to fund this program and to support the launch of EIR schools.

Catalyst Board members will support fundraising efforts and many board members have strong track records of fundraising experience (see **Section 26** and **Section 29**).

The Catalyst board will approve fundraising goals, strategies, and plans each year at their annual meeting. Catalyst co-founder will report on progress made toward goals regularly. Progress toward goals will be an important element of the evaluation of Catalyst co-founder.

Strategy 1: Fundraising Strategy and Development of Collateral and Marketing Presence

During our planning years, Catalyst co-founders have completed an analysis of the fundraising landscape in Kitsap County, as well as locally and nationally. These efforts have resulted in the creation of a case for support for Catalyst: Bremerton as well as a vision for short- and long-term fundraising that the school will need to thrive financially and provide scholars and families with the learning experiences needed to meet our ambitious mission. The following table outlines key efforts related to this phase of our planning:

Tasks	Person(s) Responsible
Recruitment of advisors and board members with deep expertise in finance, school operations, and fundraising.	Amanda Gardner
Participation in learning and development around best practices in fundraising, especially for start-up schools.	Amanda Gardner
Creation of five-year budget forecast with analysis of gaps and need for fundraising efforts.	Amanda Gardner
Creation of key collateral and marketing materials for Catalyst: Bremerton.	Amanda Gardner
Establishment of infrastructure to support effective fundraising.	Amanda Gardner

Tasks	Person(s) Responsible
Completion/creation of a fundraising/development plan as well as associated project management plan for specific tasks.	Amanda Gardner

Over the past 12 to 18 months, Catalyst co-founders have worked to deepen their expertise and skills related to fundraising. To this end, co-founder Amanda Gardner has received development and support from leading experts in non-profit fundraising such as Sierra Jenkins, VP of Content Strategy and Partnerships at Innovate Public Schools, and Sarah Lightfoot, an experienced and well-regarded consultant who focuses on supporting educational organizations in their fundraising efforts.

Additionally, over the past year, school co-founders have worked to set up the infrastructure needed to fundraise effectively. This has consisted of filing for incorporation as a Washington non-profit as well as securing tax-exempt status. This also has included setting up bank accounts, internal controls and financial systems and procedures, and identifying vendors to provide back-office support. We have also launched and developed our social media presence, set up our initial website, and created marketing collateral materials such as flyers, posters, etc. Through these efforts we have established over 100 likes on our initial launch of our Facebook page and have established a contact list of nearly 400. We have also established relationships with local media, including the recent release of a positive article in the Kitsap Sun regarding the school.

Strategy 2: National Institutional Funders

As a new and growing organization, Catalyst: Bremerton must establish relationships with national funders who are interested in supporting education reform efforts in Washington. Catalyst co-founders have strong relationships with prominent national funders and will continue to cultivate these relationships over time. Specific tasks include:

Tasks	Person(s) Responsible
Cultivation of relationships with national funders who are aligned with the mission of Catalyst: Bremerton. Our goal is to establish a relationship with at least three national funders who support our work at the \$300-500K range.	Amanda Gardner
Yearly, create a project planning document with key touchpoints for each funder, including the following: <ul style="list-style-type: none"> Review websites for each funder and create a calendar of important timelines, events, application procedures, etc. Create spreadsheet with contact information for grant managers as well as specific details about how each foundation accepts proposals and areas of alignment for funding. 	Amanda Gardner
Establish initial touchpoints with each funder by setting up an initial call or in-person meeting.	Amanda Gardner

Tasks	Person(s) Responsible
Keep each funder abreast of key updates as school planning and launch commences.	Amanda Gardner
Identify key ambassadors to advocate for Catalyst with key funders.	Amanda Gardner
Submit grant proposals and applications, as appropriate, per relative timelines for each funder.	Amanda Gardner
Create calendar for grant reporting requirements as grants are issued.	Amanda Gardner

Strategy 3: Local Institutional Funders

Catalyst: Bremerton must also establish relationships with local funders who are interested in supporting education reform efforts in Washington. Specific tasks include:

Tasks	Person(s) Responsible
<p>Cultivation of relationships with local funders who are aligned with the mission of Catalyst: Bremerton. Our goal for 2019 is to establish relationships with and secure funding from:</p> <ul style="list-style-type: none"> • 5 individuals/organizations who will support our work in the \$1,000+ range • 10 individuals/organizations who will support our work in the \$500-\$1000 range • 25 individuals who will support our work in the \$50-\$500 	Amanda Gardner
<p>Yearly, create a project planning document with key touchpoints for each funder, including the following:</p> <ul style="list-style-type: none"> • Review websites for each funder and create a calendar of important timelines, events, application procedures, etc. • Create spreadsheet with contact information for grant managers as well as specific details about how each foundation accepts proposals and areas of alignment for funding. 	Amanda Gardner
Establish initial touchpoints with each funder by setting up an initial call or in-person meeting	Amanda Gardner
Keep each funder abreast of key updates as school planning and launch commences.	Amanda Gardner
Identify key ambassadors to advocate for Catalyst with key funders.	Amanda Gardner

Tasks	Person(s) Responsible
Submit grant proposals and applications, as appropriate, per relative timelines for each funder.	Amanda Gardner
Create calendar for grant reporting requirements as grants are issued.	Amanda Gardner

Strategy 4: Individual Donors

In addition to cultivating relationships with local and national funding organizations, Catalyst: Bremerton will also set annual fundraising goals related to donations from individuals and families. The Catalyst Board of Directors will be key allies in this effort. Annually, the Board and the school co-founders will set fundraising goals for this purpose, including setting “give/get” targets for each individual. While raising a certain amount of money will not be a requirement for board membership, board members will be supported to fundraise for Catalyst each academic year. Other tasks include:

Tasks	Person(s) Responsible
Complete an asset map of the local community, identifying individuals who have the means and the interest to support Catalyst: Bremerton. <ul style="list-style-type: none"> • 5 individuals/organizations who will support our work in the \$1,000+ range • 10 individuals/organizations who will support our work in the \$500-\$1000 range • 25 individuals who will support our work in the \$50-\$500 	Amanda Gardner + Board
Create a pipeline strategy document to outline key efforts and goals for fundraising from individuals and families. This strategy will include: <ul style="list-style-type: none"> • Current donors • Potential future donors • Strategies for cultivating potential future donors • Best practices and events around stewardship • Opportunities for development for co-founders and the board related to fundraising 	Amanda Gardner + Board
Set monthly goals for cultivation conversations with individuals per month. Monitor progress toward goals.	Amanda Gardner + Board
Schedule and calendar non-ask events and advice meetings with potential individuals of interest.	Amanda Gardner + Board

Tasks	Person(s) Responsible
Schedule and calendar key fundraising and friend-raising events for the year, determine board participation in planning and running events (via Development Board committee, once established).	Amanda Gardner + Board
Identify key ambassadors to advocate for Catalyst with key individuals and families.	Amanda Gardner + Board
Secure donations and funding, as aligned with plans, goals, and targets.	Amanda Gardner + Board

As a part of each of these strategies we will develop a calendar of donor engagement opportunities. In 2019, these events will include a house meeting fundraiser hosted by a group of supporters on Bainbridge Island and a friend- and fundraising event focused on cultivating relationships with the business community in Kitsap County. Once Catalyst: Bremerton opens, donor cultivation events will include school tours and regular house meeting events hosted by Catalyst supporters and/or parents.

Additionally, we are actively creating the collateral and materials that we need to support these fundraising efforts. This includes drafting a case of support, flyers, and a school brochure/design canvas. Some of these items are included at the end of this attachment.

Team Roles

In addition to the roles and responsibilities outlined in this attachment, additional responsibilities include:

- Data management: Director of Finance and Operations
- Contact data-base entry and management: Director of Finance and Operations/Office Manager
- Gift receipting: Director of Finance and Operations/Office Manager
- Grant metrics management and reporting: Director of Finance and Operations
- Financial/gap analysis and step back to goals: Director of Finance and Operations
- Management of donor touchpoints through development cycle: Amanda Gardner/Director of Finance and Operations
- Ongoing relationship management and follow through: Amanda Gardner/Director of Finance and Operations

Overview of Current Fundraising Prospects

Currently we have established relationships with several local and national funders who have expressed interest in supporting Catalyst Public Schools. We have included start-up funding from the Washington Charter Schools Association, with assurances for additional implementation and growth grants over time. We have also applied for Invent funding through New Schools Venture Fund and are beginning the due diligence process to receive funding from Charter School Growth Fund. Each of these funding sources is considered highly likely given the track record of Catalyst co-founders.



Catalyst: Bremerton

Section 28: Attachment 31

Contents:

- Recent Internal Financial Statements: N/A—Catalyst is a newly established Washington nonprofit corporation with no financial history.



Catalyst: Bremerton

Section 28: Attachment 32

Contents:

- Independent Financial Audit Reports and Management Letters: N/A—Catalyst is a newly established Washington nonprofit corporation with no financial history.



Catalyst: Bremerton

Section 29: Attachment 33

Contents:

- Portfolio Summary Template: N/A—Catalyst does not operate any other schools.



Catalyst: Bremerton

Section 30: Attachment 34

Contents:

- Signed CSP Grant Statement of Assurances



SUPERINTENDENT OF PUBLIC INSTRUCTION

Chris Reykdal Old Capitol Building · PO BOX 47200 · Olympia, WA 98504-7200 · <http://www.k12.wa.us>

Attachment 34

WASHINGTON STATE CHARTER SCHOOL PROGRAM STATEMENT OF ASSURANCES 2018-19

The Board President and Board-Appointed Authorized Representative must sign below to indicate their approval of the contents of the application, and the receipt of program funds.

On 2/24/2019, the Board of Catalyst Public Schools (the Board) hereby applies for and, if awarded, accepts the federal program funds requested in this application. In consideration of the receipt of these grant funds, the Board agrees that the General Assurances form for all federal funds and the terms therein are specifically incorporated by reference in this application. The Board also certifies that all program and pertinent administrative requirements will be met. These include the Education Department General Administrative Regulations (EDGAR), the Office of Management and Budget Accounting Circulars, and the U.S. Department of Education's General Education Provisions Act (GEPA) requirement.

Charter schools that accept funding through the Washington State Charter School Program Grant agree to the following assurances:

The authorized representative possesses the legal authority to apply for this grant and agrees to the following terms:

1. The applicant will annually, for the life of the grant, provide the U.S. Secretary of Education and the Washington State Office of Superintendent of Public Instruction (OSPI) such information as may be required to determine if the charter school is making satisfactory progress toward achieving the funded activities. This includes participation in any federal or state funded charter school evaluations or studies.
2. The applicant will fully cooperate with the U.S. Secretary of Education and OSPI in evaluating the program being funded by the grant.
3. The charter school will have a fully independent governing board that will exercise autonomy in all matters, to the extent authorized by chapter 28A.710 RCW, in such areas as budget, personnel and educational programs.
4. The charter school is either a public benefit nonprofit corporation as defined in RCW 24.03.490, or a nonprofit corporation as defined in RCW 24.03.005 that has applied for tax exempt status under section 501(c)(3) of the internal revenue code of 1986 (26 U.S.C. Sec. 501(c)(3)), is not a sectarian or religious organization, meets all of the requirements for a public benefit nonprofit corporation before receiving any funding under RCW 28A.710.220, is governed by an independent governing board, and will be operated according to the terms of a charter contract executed with an approved Washington State charter school authorizer.
5. The charter school understands acknowledges the administrative power and duties of charter school authorizers as outlined in Chapter 28A.710.100 RCW

6. The charter school functions as a local education agency under applicable federal laws and regulations, is responsible for meeting, and will meet, the requirements of local education agencies and public schools under those federal laws and regulations, including but not limited to:

- a. Compliance with the Individuals with Disabilities Education Improvement Act (IDEA, 20 U.S.C. Sec. 1401 *et seq.*);
- b. Compliance with the Federal Educational Rights and Privacy Act (FERPA, 20 U.S.C. Sec. 1232g);
- c. Compliance with the Elementary and Secondary Education Act, as amended (ESEA, 20 U.S.C. Sec. 6301 *et seq.*), including but not limited to provisions on school prayer, the Boy Scouts of America Equal Access Act, the Armed Forces Recruiter Access to Students and Student Recruiting Information, the Unsafe School Choice Option, and provisions regarding assessments;
- d. Compliance with requirements that ensure a student's records, and, if applicable, a student's individualized education program, will follow the student, in accordance with applicable federal and state law;
- e. Compliance with Title IX of the Education Amendments of 1972 (20 U.S.C. § 1681);
- g. Compliance with Section 504 of the Rehabilitation Act of 1973 (29 U.S.C. § 794); and
- h. Compliance with Title II of the Americans with Disabilities Act of 1990 (42 U.S.C. § 12101).
- i. Compliance with McKinney-Vento Homeless Assistance Act of 1987 (42 U.S.C. Sec. 11431 *et seq.*

7. The charter school hires, manages, and discharges any charter school employee in accordance with the terms of Chapter 28A.710 RCW and the charter school's charter contract;

8. The charter school will receive and disburse funds solely in accordance with the purposes of the charter school;

9. To the extent it enters into contracts with any school district, educational service district, or other public or private entity for the provision of real property, equipment, goods, supplies, and services, including educational instructional services and including for the management and operation of the charter school, the charter school will do so to the same extent as other non-charter public schools, as long as the charter school's board maintains oversight authority over the charter school;

10. The charter school will not enter into any contracts for management operation of the charter school except with nonprofit organizations;

11. To the extent it enters into contracts with other entities regarding real property, the charter school will include provisions regarding the disposition of the property if the charter school fails to open as planned or closes, or if the charter contract is revoked or not renewed;

12. To the extent it issues secured and unsecured debt, including pledging, assigning, or encumbering its assets to be used as collateral for loans or extensions of credit to manage cash flow, improve operations, or finance the acquisition of real property or equipment, the charter school will not pledge, assign, or encumber any public funds received or to be received pursuant to RCW 28A.710.220 or under this grant;

13. The charter school ensures that no debt incurred by the charter school is a general, special, or moral obligation of the state or any other political subdivision or agency of the state;

14. The charter school will not pledge either the full faith and credit or the taxing power of the state or any political subdivision or agency of the state for the payment of the debt;
15. To the extent it solicits, accepts, and administers for the benefit of the charter school and its students, gifts, grants, and donations from individuals or public or private entities, the charter school will not solicit, accept, and administer any such gifts, grants or donations from sectarian or religious organizations and will not accept any gifts or donations the conditions of which violate Chapter 28A.710 RCW or any other state laws;
16. The charter school will issue diplomas to students who meet state high school graduation requirements established under RCW 28A.230.090 even though the charter school board may establish additional graduation requirements;
17. The charter school will not levy taxes or issue tax-backed bonds and will not acquire or attempt to acquire property by eminent domain;
18. The charter school will operate according to the terms of its charter contract and the provisions of Chapter 28A.710 RCW;
19. The charter school will comply with local, state, and federal health, safety, parents' rights, civil rights, and nondiscrimination laws applicable to Washington State school districts and to the same extent as school districts, including but not limited to chapter 28A.642 RCW (discrimination prohibition), chapter 28A.640 RCW (sexual equality), RCW 28A.605.030 (student education records), RCW 28A.320.125 (safe school plans), and chapter 28A.210 RCW (health and screening requirements);
20. The charter school will provide basic education, as provided in RCW 28A.150.210, including instruction in the essential academic learning requirements and will participate in the statewide student assessment system as developed under RCW 28A.655.070 and in accordance with the requirements of chapter 28A.710 RCW;
21. The charter school will employ certificated instructional staff as required in RCW 28A.410.025, provided that the charter schools may hire non-certificated instructional staff of unusual competence and in exceptional cases as specified in RCW 28A.150.203 (7);
22. The charter school will comply with the employee record check requirements in RCW 28A.400.303;
- 23.. The charter school will adhere to generally accepted accounting principles and be subject to financial examinations and audits as determined by the state auditor, including annual audits for legal and fiscal compliance;
24. The charter school will comply with the annual performance report under RCW 28A.655.110;
25. The charter school will be subject to the performance improvement goals adopted by the Washington State Board of Education under RCW 28A.305.130;
26. The charter school will comply with the Open Public Meetings Act in chapter 42.30 RCW and public records requirements in chapter 42.56 RCW;

27. The charter school will be subject to and comply with all legislation governing the operation and management of charter schools;
28. The charter school will comply with all state statutes and rules made applicable to the charter school in the charter school's charter contract;
29. The charter school will not engage in any sectarian practices in its education program, admissions or employment policies, or operations;
30. The charter school will be subject to the supervision of the Superintendent of Public Instruction and the State Board of Education, including accountability measures, to the same extent as other public schools, except as otherwise expressly provided by law;
31. The charter school will not limit admission on any basis other than age group, grade level, or capacity and must enroll all students who apply within these bases and will be open to any student regardless of his or her location of residence;
32. The charter school will not charge tuition, but may charge fees for participation in optional extracurricular events and activities in the same manner and to the same extent as do other public schools;
33. If capacity is insufficient to enroll all students who apply to the charter school, the charter school will select students through a lottery to ensure fairness.
34. The charter school will give an enrollment preference to siblings of already enrolled students;
35. The Board will annually determine the capacity of the charter school in consultation with the charter school's authorizer, with consideration of the charter school's ability to facilitate the academic success of its students, achieve the objectives specified in the charter contract, and assure that its student enrollment does not exceed the capacity of its facility;
36. The charter school will comply with all federal, state, county, region, or community health and safety laws, rules, or regulations that may apply to its facilities and property;
37. The charter school has disclosed any real, potential or perceived conflicts of interest that could impact the approval or operation of the charter school;
38. If applicable, the charter school will meet any preopening and/or reopening requirements or conditions imposed by its authorizer, including but not limited to requirements or conditions to monitor the start-up progress of the charter school and to ensure that the charter school is prepared to open smoothly on the date agreed, and to ensure that the charter school meets all building, health, safety, insurance, and other legal requirements for school opening;
39. The charter school will comply with, and fully participate in, any activity by its authorizer that the authorizer deems necessary for it to monitor, engage in oversight, or engage in corrective action pursuant to RCW 28A.710.180;

40. The charter school will comply with any corrective actions or sanctions imposed upon it by its authorizer pursuant to Chapter 28A.710 RCW;
41. The charter school will comply with all renewal and nonrenewal actions required of it by its authorizer or by law, including but not limited to the requirements imposed by RCW 28A.710.190 and .200;
42. The charter school will comply with any nonrenewal of termination actions imposed by its authorizer pursuant to Chapter 28A.710 RCW and duly adopted rules of the authorizer;
43. The charter school will report student enrollment in the same manner and based on the same definitions of enrolled students and annual average full-time equivalent enrollment as other public schools;
44. The charter school will comply with applicable reporting requirements to receive state or federal funding that is allocated based on student characteristics;
45. The charter school will, at all times, maintain all necessary and appropriate insurance coverage;
46. The charter school will indemnify and hold harmless the authorizer and its officers, directors, agents and employees, and any successors and assigns from any and all liability, cause of action, or other injury or damage in any way relating to the charter school or its operation;
47. If there are exceptions to these assurances, the charter school has described them in full detail on a separate page attached to this document.
48. The Board's members will complete the financial affairs statement disclosures as required by law and address any conflicts identified by such disclosure.
49. The applicant will provide such other information and assurances as the U.S. Secretary of Education and OSPI and SEA may require.
50. All of the information submitted in the application is true, correct, complete, and in compliance with state and federal law.
51. These assurances are made by the Board through its duly authorized representative.

The Board has reviewed and discussed these assurances and passed a motion affirming current and future compliance with these assurances.

It is the responsibility of each local charter school that receives funds under this grant to comply with all required federal assurances. Funded sites will be expected to cooperate with the Department in the development and submission of certain reports to meet certain state and federal guidelines and requirements. All grantees are required to provide requested data to OSPI. In addition, funded projects will be required to maintain appropriate fiscal and program records. Fiscal audits of funds under this program are to be conducted by the recipient agencies annually as a part of their regular audit. Auditors should be aware of the Federal audit requirements contained in the Single Audit Act of 1984.

IF ANY FINDINGS OF MISUSE OF FUNDS ARE DISCOVERED, PROJECT FUNDS MUST BE RETURNED TO THE WASHINGTON OFFICE OF SUPERINTENDENT OF PUBLIC INSTRUCTION. OSPI may terminate a grant award upon thirty (30) days' notice if it is deemed by OSPI that the applicant is not fulfilling the funded program as specified in the approved project application.

Grant recipients will be required to keep and maintain all equipment purchased with grant funds in accordance with the requirements of federal law and regulation. Should the charter school close or be terminated by the sponsor, the charter school will work with OSPI and the school's authorizer regarding distribution of assets purchased with this grant.

The governing body of the charter school applicant has authorized the filing of this application and the undersigned representative has been duly authorized to file this application and act as the authorized representative of the applicant in connection with this application.

I do hereby certify that all facts, figures, and representations made in this application are true and are correct and are consistent with the statement of certifications. Furthermore, all applicable statutes, regulations, and procedures for program and fiscal control and for records maintenance will be implemented to ensure proper accountability of funds distributed for this project. All records necessary to substantiate these items will be available for review by state and federal monitoring staff. All progress reports and the final report requested through this grant program will be filed on time. I further certify that all disbursements will be obligated after the grant has been awarded and the revised budget (if applicable) is approved and prior to the termination date; all disbursements have not been previously reported; and disbursements were not used for matching funds on this or any special project.

Name of Applicant School: Catalyst Public Schools

Charter School Leader/Principal (Printed Name): Amanda Gardner

Charter School Leader/Principal Signature: Amanda Gardner

Date Signed: 2/24/2019

Charter School Board President/Chair (Printed Name): Julie Kennedy

Charter School Board President/Chair Signature: Julie Kennedy

Date Signed: 2/24/2019



Catalyst: Bremerton

Section 30: Attachment 35

Contents:

- OPSI Project Budget Form and Line Item Budget Narrative

Attachment 35: CSP Budget Narrative

Budget Narrative

Catalyst: Bremerton prepared this budget to meet the goals outlined for the 2019-2020 planning year with the allotted \$200,000 CSP grant funds. If additional opportunities arise for future grants, additional goals and objectives will be identified.

Goal 1: Catalyst will develop a full standards-aligned and rigorous curriculum for grades K-8 by May of 2020 including course scope and sequence documents, implementation guides, performance and paper and pen assessments and related rubrics.

Of these funds, \$195,000 will be allocated to the development of the Catalyst curriculum to ensure a strong start to the Catalyst academic program by the fall of 2020. This amount will support the salary of the school co-founders who will dedicate approximately three fourths of their time to develop elementary and middle school curricula during the planning year. This amount equates to .75 of each cofounder's salary in the planning year.

Goal 2: Catalyst will increase the capacity of school co-founders and board members to create an educational program that is rooted in diversity, equity, and inclusion (DEI) and is culturally relevant by participating in Culturally Relevant Teaching and the Brain workshops and events and by participating in DEI intensive sessions with facilitators such as Ana Becerra and/or Caroline Hill. School co-founders will also participate in professional development related to project-based learning offered by organizations such as the Buck Institute.

Of the CSP funds, \$5,000 will be used to cover costs of these professional development activities and related travel. One school co-founder will attend the Culturally Relevant Teaching and the Brain workshops. In addition, the full Catalyst board and founding team will participate in the DEI intensive. It is anticipated that registration and for the Culturally Relevant Teaching sessions will be \$700 with \$800 dedicated to travel. Program fees for the DEI intensive will be \$3,000 with travel for the facilitator totaling \$500.



State of Washington
OFFICE OF SUPERINTENDENT OF PUBLIC INSTRUCTION
OLD CAPITOL BUILDING
PO BOX 47200, OLYMPIA WA 98504-7200

STATE AND FEDERAL PROJECT EXPENDITURE REPORT

CFDA _____

Program No. _____

Fiscal Year _____

Sub. Program No. _____

Revenue Acct. _____

ESD	CO	DIST	GRANT NUMBER
<input type="checkbox"/> Check if final report and project completed		EXPENDITURE PERIOD	
		Beginning	Ending

DISTRICT/ NAME	PROJECT TYPE/NAME	CONTACT PERSON	TELEPHONE NUMBER
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OBJECT OF EXPENDITURE										
ACTIVITY	TOTAL	DEBIT TRANSFER 0	CREDIT TRANSFER 1	SALARIES CERTIFICATED 2	SALARIES CLASSIFIED 3	BENEFITS AND PAYROLL TAXES 4	SUPPL INSTRUCT RESOURCES AND NONCAPITAL 5	PURCHASED SERVICES 7	TRAVEL 8	CAPITAL OUTLAY 9
15 Public Relations	0.00		XXX							
21 Supervision-Instruction	0.00		XXX							
22 Learning Resources	0.00		XXX							
23 Principal's Office	0.00		XXX							
24 Guidance and Counseling	0.00		XXX							
25 Pupil Mgt. and Safety	0.00		XXX							
26 Health/related Serv.	0.00		XXX							
27 Teaching	0.00		XXX							
28 Extracurricular	0.00		XXX							
29 Payments to School Districts	0.00	XXX	XXX	XXX	XXX	XXX	XXX		XXX	XXX
31 Instructional Professional Dev	5,000.00		XXX					3,700.00	1,300.00	
32 Instructional Technology	0.00		XXX	XXX						
33 Curriculum	195,000.00		XXX	195,000.00						
41 Supervision-Nutrition	0.00		XXX	XXX						
42 Food	0.00		XXX	XXX	XXX	XXX	XXX		XXX	XXX
44 Operations-Nutrition	0.00		XXX	XXX	XXX					
49 Transfer-Nutrition	0.00	XXX			XXX	XXX	XXX	XXX	XXX	XXX
62 Grounds Maint.	0.00		XXX	XXX		XXX				
63 Operation of Building	0.00		XXX	XXX						
64 Maintenance	0.00		XXX	XXX						
65 Utilities	0.00		XXX	XXX	XXX	XXX	XXX		XXX	XXX
68 Insurance - Except Trans.	0.00		XXX	XXX	XXX	XXX	XXX		XXX	XXX
91 Public Activities	0.00		XXX							
Direct Expenditures to Date Subtotal	200,000.00	0.00	0.00	195,000.00	0.00	0.00	0.00	3,700.00	1,300.00	0.00
Indirect Expenditures to Date	0.00									
TOTAL EXPENDITURES TO DATE	200,000.00									
LESS: Cash Received to Date	0.00									
BALANCE/<DEFICIT>	-200,000.00									

I, the undersigned, hereby certify that the amount listed for materials furnished, services rendered, expenditures incurred, or items of indebtedness as changed is true and correct, that the claim is just and due; and that I am authorized to sign for the payee.