

## CHARTER SCHOOL PERFORMANCE CERTIFICATE

This Performance Certificate (“Certificate”) is executed on **April 14, 2022**, by and between the Idaho Public Charter School Commission (the “Authorizer”) and **Syringa Mountain School, Inc.** (the “Charter Holder”) for the purpose of operating **Syringa Mountain School** (the “School”), an independent public school organized as an Idaho nonprofit corporation and established under the Public Charter Schools Act of 1998, Idaho Code section 33-5201 *et seq.*, as amended (the “Charter Schools Act”).

### RECITALS

WHEREAS, the **Charter Holder** is a non-profit entity incorporated with a board of directors; and

WHEREAS, **on August 15, 2013** the Authorizer conditionally approved the Charter Holder’s new charter school petition; and

WHEREAS, **on February 7, 2017**, the Authorizer conditionally renewed the School’s charter for a five-year term of operations to begin July 1, 2017 and end on June 30, 2022; and

WHEREAS, **on February 11, 2022**, the Authorizer conditionally renewed the School’s charter for a subsequent five-year term of operations to begin July 1, 2022 and end on June 30, 2027.

NOW THEREFORE in consideration of the foregoing recitals and the mutual understandings contained herein, the Authorizer and the **Charter Holder** agree as follows:

### SECTION 1: TERMS OF AUTHORIZATION

- A. Establishment of School.** The Charter Holder is hereby authorized to implement at the School the program described in the Charter, attached to this Certificate as **Appendix C** and incorporated herein by this reference. Any significant changes to any section of the Charter, including the educational program, facilities plan, financial plan, or the management plan, during the School’s pre-operational period or first operational term shall be treated as an amendment in accordance with the Authorizer’s policy.
- B. Term of Agreement.** The School’s operational term shall be from July 1, **2022** and end on June 30, **2027**. Subsequent terms of operation may be issued by the Authorizer in accordance with Idaho Code and Authorizer policy.
- C. Renewal Conditions.** The School is conditionally approved to operate. Applicable conditions are attached as Appendix B and incorporated herein by this reference. If all renewal conditions have been completed to the satisfaction of the Authorizer by the stated due date, the School shall continue operations through the remainder of the current Certificate term. In the event that all renewal conditions have not been completed to the satisfaction of the Authorizer by the stated due date, the Authorizer will consider whether to exercise its authority to revoke the School’s Charter at its next regularly scheduled meeting.

## SECTION 2: EDUCATIONAL PROGRAM

**A. School Mission.** The mission of the School is as follows:

Syringa Mountain School provides a rigorous, arts-integrated educational experience as a public school guided by the core principles of Waldorf Education and aims to develop students who are compassionate, eco-literate, critical thinkers prepared to meet the demands of the world. **Grades Served.** The School may serve students in grades Kindergarten through 8.

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

- i. The School shall provide teacher looping, such that cohorts of students move through multiple grades together with the same classroom teacher. This shall be verified by classroom rosters.
- ii. The School shall apply curriculum designed to be developmentally appropriate and therapeutic for students. This shall be verified by review of curriculum and lesson plans.
- iii. The School shall implement a schedule organized to include main lesson, practice periods, and specialty subjects. This shall be verified by reviewing weekly and daily schedules.
- iv. The School shall balance academic studies with artistic and social activities. This shall be verified by weekly teacher newsletters, curriculum and lesson plans.
- v. The School shall foster strong parent involvement in the school, including provision of parent educational opportunities. This shall be verified by weekly teacher newsletters, board meeting minutes and parent council meetings, event notes and minutes, and parent volunteer opportunities.
- vi. The School shall create a safe learning environment through a positive but firm disciplinary approach. This shall be verified by the school's handbook and classroom observation.

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

**D. Accreditation.** As the School is not authorized to serve grades 9-12, accreditation is not required by rule, but may be maintained at the discretion of the Charter Holder. All reports issued to the School from the accrediting agency shall be submitted to the Authorizer within five days of receipt.

## SECTION 3: SCHOOL GOVERNANCE

**A. Governing Board.** The School shall be governed by a non-profit board of directors (the "Board") incorporated by the Charter Holder. The Board shall serve as public agents authorized by the Authorizer, in a manner that is consistent with the terms of this Certificate, so long as such provisions are in accordance with state and federal laws, rules and regulations. The Board shall have final authority with respect to the School's operation, and shall have the responsibility of overseeing academic achievement, financial stability, and operational management of the School. The Charter Holder shall also be responsible for maintaining and enforcing a compliant Board and providing overall Board stewardship for the School.

**B. Articles of Incorporation and Bylaws.** The articles of incorporation and bylaws of the Charter

Holder shall provide for governance of the operation of the School as a nonprofit corporation and a public charter school, and shall at all times be consistent with all applicable laws, rules, regulations, and this Certificate. The Charter Holder shall notify the Authorizer of any modification to the articles of incorporation or bylaws within five business days of approval by the Charter Holder.

- C. Charter Board Composition.** The composition of the Board shall at all times be determined by and consistent with the articles of incorporation and bylaws, and all applicable laws, rules, regulations, and policies. The Charter Holder shall notify the Authorizer of any changes to its composition and provide an amended School Leadership Roster within five business days of it taking effect.

#### **SECTION 4: AUTHORIZER ROLE AND RESPONSIBILITIES**

- A. Oversight Allowing Autonomy.** The Authorizer's role shall be to evaluate the School's performance outcomes according to this Certificate and the Performance Framework, and shall be to provide compliance oversight. The Authorizer shall comply with the provisions of the Charter Schools Act and the terms of this Certificate in a manner that does not unduly inhibit the autonomy of the School.
- B. Charter School Performance Framework.** The Charter School Performance Framework ("Performance Framework") is attached and incorporated into this agreement as **Appendix A**. The Performance Framework shall be used to annually evaluate the School's academic achievement, Board stewardship, operational management, and financial stability. The specific terms of the Performance Framework are determined by the Authorizer and shall be binding on the School.
- C. Identified Comparison Group.** For purposes of evaluating the School against the metrics and measures established in the Performance Framework, the School's comparison group shall be identified as described below and shall be established for the length of the Certificate term.
- i. The School's comparison group shall include all schools in the following school district: **Blaine County (061)**.
- D. Authorizer to Monitor School Performance.** The Authorizer shall monitor and report on the School's progress in relation to the indicators, measures, metrics, and targets set out in the Performance Framework. A formal report of the School's academic, financial, and operational performance ("Performance Report") shall be provided to the school and the public by the Authorizer annually. Data necessary to conduct this evaluation will be collected throughout the year. Additional reviews may be necessary if compliance concerns arise.
- E. School Performance.** The School shall meet standard on all measures of the Performance Framework. The Authorizer shall renew any charter in which the School met all the terms of its Certificate, including all appendices, at the time of renewal.
- F. Performance Framework as Basis for Renewal of Charter.** The School's performance in relation to the Performance Framework, as reported in the annual Performance Report issued by the Authorizer to the Charter Holder, shall provide the basis upon which the Authorizer shall decide whether to renew the School's Charter at the end of the Certificate term. The School's Performance Framework includes mission-specific measures, agreed to by the School and the

Authorizer, and are incorporated in the Performance Framework.

- G. Required Reports.** The School shall prepare and submit reports as required by the Authorizer's policy.
- H. Authorizer's Right to Review.** The Authorizer maintains the right to request and review additional documentation if such becomes necessary in the course of regular oversight duties or to investigate the validity of a compliance concern. The Authorizer shall conduct its reviews in a manner that does not unduly inhibit the autonomy granted to the School.
- I. Site Visits.** The Authorizer may conduct site visits in accordance with the Authorizer's policy. Reports from any site visit shall be made available to the School and shall be included in the School's annual Performance Report.

## SECTION 5: SCHOOL OPERATIONS

- A. In General.** The School and the Charter Holder shall operate at all times in accordance with all federal and state laws, rules, regulations, local ordinances, and Authorizer policies applicable to public charter schools.
- B. Maximum Enrollment.** The maximum number of students who may be enrolled in the School, across all programs, shall be 520.
- C. Equitable Enrollment Procedures.** The School shall make student recruitment, admissions, enrollment, and retention decisions in a nondiscriminatory manner and without regard to race, color, creed, national origin, sex, marital status, religion, ancestry, disability or need for special education services. In no event may the School limit admission based on race, ethnicity, national origin, disability, gender, income level, athletic ability, or proficiency in the English language. If there are more applications to enroll in the School than there are spaces available, the School shall select students to attend using a random selection process that shall be publicly noticed and open to the public.
  - i. Calendar.** The School shall operate on a traditional nine-month calendar in which the last day of the regular term shall fall on or before June 30.
- D. School Facilities.** The School shall operate at the following location(s): 4021 Glenbrook Dr., Hailey, ID 83333. The School shall provide the Authorizer with facilities documentation, including occupancy permits, fire marshal reports, building inspection reports, and health department reports for any facility newly occupied by the School, and any remodeling or construction project for which such documentation is necessary in accordance with Authorizer policy and in accordance with law, rule, regulations, and authorizer policy.
- E. Attendance Area.** The School's primary attendance area shall be used for the purposes of determining applicability of this enrollment preference category.
  - i.** The School's primary attendance areas is as follows: Blaine County School District 61.
- F. Staff.** Instructional staff shall be certified as provided by rule of the State Board of Education. All full-time staff members of the School shall be covered by the Public Employee Retirement System of Idaho, federal social security, unemployment insurance, worker's compensation insurance, and health insurance.
- G. Alignment with All Applicable Law.** The School shall comply with all applicable federal and state laws, rules, and regulations. In the event any such laws, rules, or regulations are amended,

the School shall be bound by any such amendment upon the effective date of said amendment.

## SECTION 6: SCHOOL FINANCE

- A. General.** The School shall comply with all applicable financial and budget laws, rules, regulations, and financial reporting requirements, as well as the requirements contained in the School's Performance Framework.
- B. Financial Controls.** At all times, the Charter Holder shall ensure that the School maintains appropriate governance, managerial procedures, and financial controls, which shall include, but not be limited to: (1) commonly accepted accounting practices and the capacity to implement them; (2) a checking account; (3) adequate payroll procedures; (4) procedures for the creation and review of monthly and quarterly financial reports, which procedures shall specifically identify the individual who will be responsible for preparing such financial reports in the following fiscal year; (5) internal control procedures for cash receipts, cash disbursements and purchases; and (6) maintenance of asset registers and financial procedures for grants, all in accordance with state and federal laws, rules, regulations, and Authorizer policy.
- C. Financial Audit.** The School shall submit audited financial statements from an independent auditor to the Authorizer no later than November 1 of each year.
- D. Annual Budgets.** The School shall adopt a budget for each fiscal year, prior to the beginning of the fiscal year. The budget shall be in the Idaho Financial Accounting Reporting Management Systems (IFARMS) format or any other format as may be reasonably requested by the Authorizer.

## SECTION 7: TERMINATION, NON-RENEWAL AND REVOCATION

- A. Relinquishment.** Should the Charter Holder choose to relinquish its Charter before the expiration of this Certificate, it may do so upon written notice to the Authorizer. In such a case, the Authorizer's closure protocol shall begin immediately following written notification.
- B. Nonrenewal.** The Authorizer may non-renew the Charter at the expiration of the Certificate if the School failed to meet one or more of the terms of its Certificate, including the Performance Framework. The Charter Holder may appeal a decision to non-renew directly to the State Board of Education.
- C. Revocation.** The School's Charter may be revoked by the Authorizer if the School has failed to meet one or more of the renewal conditions, included in Appendix B, by the stated due date. The School's Charter may be revoked as provided by Idaho Code section 33-5209C. In such an event, the Authorizer shall consider whether to revoke the School's Charter at its next regularly scheduled meeting. The decision shall be made at that time. The Charter Holder may appeal a decision to revoke directly to the State Board of Education.
- D. Closure.** The Authorizer's closure protocol shall begin immediately after a decision to relinquish is made by the Charter Holder, or a decision to revoke or non-renew or is made by the Authorizer. Closure protocol shall begin regardless of whether the Charter Holder appeals the decision. In the event that closure protocol begins, the School shall cease operations no later than the following June 30. Closure protocol shall only cease if the State Board of Education overturns the Authorizer's decision.

## SECTION 8: MISCELLANEOUS


- A. **No Employee or Agency Relationship.** None of the provisions of this Certificate will be construed to create a relationship of agency, representation, joint venture, partnership, ownership, or employment between the Authorizer and the School.
- B. **Additional Services.** Except as may be expressly provided in this Certificate, as set forth in any subsequent written agreement between the School and the Authorizer, or as may be required by law, neither the School nor the Authorizer shall be entitled to the use of or access to the services, supplies, or facilities of the other.
- C. **No Third-Party Beneficiary.** This Certificate shall not create any rights in any third parties, nor shall any third party be entitled to enforce any rights or obligations that may be possessed by either party to this Certificate.
- D. **Amendment.** This Certificate may be amended by agreement between the School and the Authorizer in accordance with Authorizer policy. All amendments must be in writing and signed by the School and the Authorizer.

IN WITNESS WHEREOF, the Authorizer and the Charter Holder have executed this Performance Certificate to be effective **April 14, 2022**.

  
Alan L. Reed (Apr 21, 2022 10:01 MDT)

Apr 21, 2022

**Chairman**  
**Idaho Public Charter School Commission**

  
Mike Adams (Apr 21, 2022 10:00 MDT)

Apr 21, 2022

**Chairman**  
**Syringa Mountain School, Inc. Governing Board**

**Appendix A: Performance Framework**

**Appendix B: Conditions**

**Appendix C: Charter**

**Appendix A: Performance Framework**





Idaho Public Charter School Commission

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Alan Reed, Chairman

Jenn Thompson, Director

# ACADEMIC MEASURES

## All School Measures

1. Math Proficiency
2. ELA Proficiency
3. Math Growth
4. ELA Growth
5. Literacy Proficiency

## 1. MATH PROFICIENCY

**Proficiency Rate:** The PCSC will use the proficiency rates as determined by the Idaho Accountability Framework and reported via the Idaho Report Card.

Math and ELA Proficiency Rubric	
Exceeds Standard	The school's proficiency rate is greater than one standard deviation above the mean of the identified comparison group, or the school's proficiency average is in 90 <sup>th</sup> percentile of all Idaho schools.
Meets Standard	<b>The school's proficiency rate is equal to the mean or falls between the mean and one standard deviation above the mean of the identified comparison group.</b>
Approaches Standard	The school's proficiency rate falls between the mean and one standard deviation below the mean of the identified comparison group.
Does Not Meet Standard	The school's proficiency rate is more than one standard deviation below the mean of the identified comparison group, OR the school has been identified for comprehensive or targeted support for three consecutive years as per the Idaho Consolidated Plan.

## 2. ELA PROFICIENCY

**Proficiency Rate:** The PCSC will use the proficiency rates as determined by the Idaho Accountability Framework and reported via the Idaho Report Card.

Math and ELA Proficiency Rubric	
Exceeds Standard	The school's proficiency rate is greater than one standard deviation above the mean of the identified comparison group, or the school's proficiency average is in 90 <sup>th</sup> percentile of all Idaho schools.
Meets Standard	<b>The school's proficiency rate is equal to the mean or falls between the mean and one standard deviation above the mean of the identified comparison group.</b>
Approaches Standard	The school's proficiency rate falls between the mean and one standard deviation below the mean of the identified comparison group.
Does Not Meet Standard	The school's proficiency rate is more than one standard deviation below the mean of the identified comparison group, OR the school has been identified for comprehensive or targeted support for three consecutive years as per the Idaho Consolidated Plan.

### 3. MATH GROWTH

**Growth Rate:** The PCSC will use the proficiency rates as determined by the Idaho Accountability Framework and reported via the Idaho Report Card.

Growth Rubric Math	
Exceeds Standard	The percentage of students in grades 3-8 who did not achieve proficiency on the current year's assessment but who did make adequate growth toward proficiency is greater than one standard deviation above the mean of the identified comparison group, OR the school's growth rate is in the 90 <sup>th</sup> percentile of all Idaho public schools.
Meets Standard	<b>The percentage of students in grades 3-8 who did not achieve proficiency on the current year's assessment but who did make adequate growth toward proficiency is equal to the mean or falls between the mean and one standard deviation above the mean of the identified comparison group, OR the growth rate increased by at least 10% over the previous year.</b>
Approaches Standard	The percentage of students in grades 3-8 who did not achieve proficiency on the current year's assessment but who did make adequate growth toward proficiency falls between the mean and one standard deviation below the mean of the identified comparison group.
Does Not Meet Standard	The percentage of students in grades 3-8 who did not achieve proficiency on the current year's assessment made adequate growth toward proficiency is more than one standard deviation below the mean of the identified comparison group.

## 4. ELA GROWTH

**Growth Rate:** The PCSC will use the proficiency rates as determined by the Idaho Accountability Framework and reported via the Idaho Report Card.

Growth Rubric ELA	
Exceeds Standard	The percentage of students in grades 3-8 who did not achieve proficiency on the current year's assessment but who did make adequate growth toward proficiency is greater than one standard deviation above the mean of the identified comparison group, OR the school's growth rate is in the 90 <sup>th</sup> percentile of all Idaho public schools.
Meets Standard	<b>The percentage of students in grades 3-8 who did not achieve proficiency on the current year's assessment but who did make adequate growth toward proficiency is equal to the mean or falls between the mean and one standard deviation above the mean of the identified comparison group, OR the growth rate increased by at least 10% over the previous year.</b>
Approaches Standard	The percentage of students in grades 3-8 who did not achieve proficiency on the current year's assessment but who did make adequate growth toward proficiency falls between the mean and one standard deviation below the mean of the identified comparison group.
Does Not Meet Standard	The percentage of students in grades 3-8 who did not achieve proficiency on the current year's assessment made adequate growth toward proficiency is more than one standard deviation below the mean of the identified comparison group.

## 5. LITERACY PROFICIENCY

**Literacy Proficiency Rate:** The PCSC will use the proficiency rates as determined by the Idaho Accountability Framework and reported via the Idaho Report Card.

Literacy Proficiency Rubric	
Exceeds Standard	<p>One of the following is true:</p> <ul style="list-style-type: none"><li>• The school's proficiency rate on the spring administration of the statewide literacy assessment is greater than one standard deviation above the mean of the identified comparison group;</li><li>• the school's proficiency rate on the spring administration of the statewide literacy assessment is at or above 90%; OR</li><li>• The fall to spring change in proficiency rate is 20% or greater.</li></ul>
Meets Standard	<p><b>The school's proficiency on the spring administration of the statewide literacy assessment is equal to the mean or within one standard deviation above the mean of the identified comparison group; OR the school's fall to spring change in proficiency rate is between 10%-19%.</b></p>
Approaches Standard	<p>The school's proficiency on the spring administration of the statewide literacy assessment falls within one standard deviation below the mean of the identified comparison group.</p>
Does Not Meet Standard	<p>The school's proficiency rate on the spring administration of the statewide literacy assessment is more than one standard deviation below the mean of the identified comparison group.</p>

# OPERATIONAL MEASURES

## BOARD STEWARDSHIP

1. Governance Structure
2. Governance Oversight
3. Governance Compliance

## OPERATIONAL MANAGEMENT

4. Student Services
5. Data Security and Information Transparency
6. Facility and Services
7. Operational Compliance

# BOARD GOVERNANCE

## 1. Governance Structure Rubric

**Data Sources:** Board bylaws, articles of incorporation, and any courtesy letters or notifications issued to the school by entities responsible for oversight or enforcement.

Governance Structure Rubric	
Exceeds Standard	The school has met standard for 3 or more consecutive years, including the most recently completed school year.
Meets Standard	<b>Board Bylaws are compliant with ID law. Articles of Incorporation are current.</b> <b>No investigations were conducted into either ethical behavior or conflict of interest regarding any board director.</b> <b>The board did not experience an Open Meeting Law violation that needed to be cured this year.</b>
Approaches Standard	The school was informed of or became aware of non-compliance and action to correct the issue was taken within 30 days.
Does Not Meet Standard	The school was informed of or became aware of non-compliance and action to correct the issue was not taken within 30 days.

## 2. Governance Oversight Rubric

**Data Sources:** Board meeting minutes, school policies, continuous improvement plan (or other strategic planning evidence if submitted by the school), and verification of submission of annual administrator evaluation.

Governance Oversight Rubric	
Exceeds Standard	The school has met standard for 3 or more consecutive years, including the most recently completed school year.
Meets Standard	<b>The board reviews academic data in a timely and thorough manner. The board reviews financial reports in a timely and thorough manner. The board maintains compliant policies.</b> <b>The board engages in strategic planning.</b> <b>The board conducts a compliant annual evaluation of their school leader and/or management organization.</b>
Approaches Standard	The school was informed of or became aware of non-compliance and action to correct the issue was taken within 30 days.
Does Not Meet Standard	The school was informed of or became aware of non-compliance and action to correct the issue was not taken within 30 days.



### 3. Governance Compliance Rubric

**Data Sources:** If applicable, courtesy letters/notifications of concerns, investigation, or findings issued to the school by entities responsible for oversight or enforcement, and any documentation of correction provided by the school.

Governance Compliance Rubric	
Exceeds Standard	The school has met standard for 3 or more consecutive years, including the most recently completed school year.
Meets Standard	<b>The PCSC did not issue any courtesy letters or notify an external investigative body of compliance concerns this year.</b>
Approaches Standard	The school was informed of or became aware of non-compliance and action to correct the issue was taken within 30 days.
Does Not Meet Standard	The school was informed of or became aware of non-compliance and action to correct the issue was not taken within 30 days.

## OPERATIONAL MANAGEMENT

### 4. Student Services Rubric

**Data Sources:** If applicable, any notifications or courtesy letters issued by the SDE or SBOE which required corrective action with regard to the school's ELL, SPED, or College and Career Readiness programs, as well as any documentation submitted by the school evidencing correction.

Student Services Rubric	
Exceeds Standard	The school has met standard for 3 or more consecutive years, including the most recently completed school year.
Meets Standard	<b>All of the following are true:</b> <ul style="list-style-type: none"><li>• <b>The school's English Language Learner program is in good standing;</b></li><li>• <b>The school's Special Education program is in good standing;The school's college and career readiness program is in good standing; and</b></li><li>• <b>The school's federal programs are in good standing.</b></li></ul>
Approaches Standard	The school was informed of or became aware of non-compliance and action to correct the issue was taken within 30 days.
Does Not Meet Standard	The school was informed of or became aware of non-compliance and action to correct the issue was not taken within 30 days.

## 5. Data Security and Information Transparency Rubric

**Data Sources:** periodic desk audit of school website, and any formal notifications regarding data security or public records compliance.

Data Security and Information Transparency Rubric	
Exceeds Standard	The school has met standard for 3 or more consecutive years, including the most recently completed school year..
Meets Standard	<b>The school's website is compliant with I.C. 33-133(7) (data collection, access, and security policy); I.C. 33-320 (continuous improvement plan); and I.C. 33-357 (expenditures updated monthly, contracts, performance reports, and annual budgets). The school did not experience any issues involving data security this year. The school did not experience any compliance issue regarding public records requests this year.</b>
Approaches Standard	The school was informed of or became aware of non-compliance and action to correct the issue was taken within 30 days.
Does Not Meet Standard	The school was informed of or became aware of non-compliance and action to correct the issue was not taken within 30 days.

## 6. Facility and Services Rubric

**Data Sources:** Verification of meal service program and transportation services via public documents and/or school website, and any notifications of concerns regarding occupancy or safety issued to the school by entities responsible for oversight or enforcement.

Facility and Building Services Rubric	
Exceeds Standard	The school has met standard for 3 or more consecutive years, including the most recently completed school year.
Meets Standard	<b>The school's occupancy certificate is current. The school maintains current safety inspections and drills. The school provides daily transportation to students in compliance with Idaho Code. The school provides a compliant lunch program.</b>
Approaches Standard	The school was informed of or became aware of non-compliance and action to correct the issue was taken within 30 days.
Does Not Meet Standard	The school was informed of or became aware of non-compliance and action to correct the issue was not taken within 30 days.

## 7. Operational Compliance Rubric

**Data Sources:** Periodic observation of enrollment lottery, and if applicable, any corrective action plans issued by the SDE not related to special education, ELL, or college and career readiness (as these are captured elsewhere), or formal notification of late reports or enrollment violations.

Operational Compliance Rubric	
Exceeds Standard	The school has met standard for 3 or more consecutive years, including the most recently completed school year.
Meets Standard	<b>Required reports are submitted accurately and on time. The school maintains a compliant enrollment process. No correct action plans were issued by the SDE this year.</b>
Approaches Standard	The school was informed of or became aware of non-compliance and action to correct the issue was taken within 30 days.
Does Not Meet Standard	The school was informed of or became aware of non-compliance and action to correct the issue was not taken within 30 days.

# FINANCIAL MEASURES

## NEAR TERM HEALTH

1. Current Ratio
2. Unrestricted Days Cash
3. Default
4. Enrollment Variance

## SUSTAINABLE HEALTH

5. Total Margin and 3Yr Aggregated Total Margin
6. Cash Flow and Multi-Year Cash Flow
7. Debt Service Coverage Ratio
8. Debt to Asset Ratio
9. Financial Compliance Rubric

## NEAR-TERM HEALTH

### 1. Current Ratio

**Calculation:** Current Assets divided by Current Liabilities

**Data Source:** Annual Fiscal Audit Report

Current Ratio Rubric	
Exceeds Standard	The school has a current ratio of more than 1.5
<b>Meets Standard</b>	<b>The school has a current ratio of at least 1.1 (or between 1.0 and 1.1 with a 1-year positive trend)</b>
Approaches Standard	The school has a current ratio of between .9 and 1.0 (or between 1.0 and 1.1 with a 1-year negative trend)
Does Not Meet Standard	The school has a current ratio of .9 or less.

### 2. Unrestricted Days Cash

**Calculation:** Unrestricted Cash and investments divided by ((Total Expenses minus Depreciation Expense) / 365)

**Data Source:** Annual Fiscal Audit Report

Unrestricted Days Cash Rubric	
Exceeds Standard	The school has more than 60 days cash on hand
<b>Meets Standard</b>	<b>The school has 60 days cash OR between 30- and 60-days cash and one-year trend is positive. Note: Schools in their first or second year of operation must have a minimum of 30 days cash.</b>
Approaches Standard	The school has between 15-30 days cash OR between 30-60 days cash, but one-year trend is negative.
Does Not Meet Standard	The school has fewer than 15 days cash on hand.

### 3. Default

**Calculation:** No calculation.

**Data Source:** Annual Fiscal Audit Report, Terms of Debt, Other Formal Notifications Received by School.

Default Rubric	
Exceeds Standard	The school has met standard for at least 3 consecutive years, including the most recently completed school year.
Meets Standard	<b>The school is not in default of any financial obligations and did not experience any instances of default during the fiscal year. Financial obligations include, but are not limited to, making payments to vendors and utility services on time, complying with all loan covenants, filing any reports required for maintenance of grants or philanthropic funds, meeting all tax obligations, and operating without financial judgements or property liens.</b>
Approaches Standard	The school experienced one or more instances of minor default during the fiscal year (such as making late payments); however, the school is not currently in default of any financial obligations.
Does Not Meet Standard	School is currently in default of financial obligations.

### 4. Enrollment Variance

**Calculation:** Actual enrollment as of the first Friday in November (drawn from ISEE) divided by enrollment projections as submitted directly to the IPCSC in July.

**Data Source:** ISEE and direct school report

Enrollment Variance Rubric	
Exceeds Standard	The school has met standard for at least 3 consecutive years, including the most recently completed school year.
Meets Standard	<b>Enrollment variance is equal to or greater than 95%.</b>
Approaches Standard	Enrollment variance was between 90% and 95%, OR the enrollment variance was less than 90% and the school provided a mid-year amended budget evidencing at least a break-even budget based on mid-term enrollment and any resulting revenue adjustments.
Does Not Meet Standard	Enrollment variance was less than 90% and the school did not provide evidence of mid-year budget amendments or operational changes evidencing at least a break-even budget based on mid-term enrollment and any resulting revenue adjustments.

## SUSTAINABLE HEALTH

### 5. Total Margin and 3Yr Aggregated Total Margin

#### Calculation:

Most Recent Year Total Margin: 2019 Net Income divided by 2019 Total Revenue.

3-Year Aggregated Total Margin: (2019 Net Income +2018 Net Income +2017 Net Income) divided by (2019 Total Revenue +2018 Total Revenue +2017 Total Revenue)

**Data Source:** Annual Fiscal Audit Report

Total Margin and 3-Yr Aggregated Total Margin	
Exceeds Standard	The school has met standard for 3 or more consecutive years, including the most recently completed school year..
Meets Standard	<b>Aggregated 3-year Total Margin is positive and the most recent year Total Margin is positive OR Aggregated 3-Year Total Margin is greater than -1.5 percent, the trend is positive for the last two years, and the most recent year Total Margin is positive. Note: For schools in their first or second year of operation, the cumulative Total Margin must be positive.</b>
Approaches Standard	Aggregated 3-Year Total Margin is greater than -1.5 percent, but trend does not "Meet Standard".
Does Not Meet Standard	Aggregated 3-Year Total Margin is less than or equal to -1.5 percent OR the most recent year Total Margin is less than -10 percent.

## 6. Cash Flow and Multi-Year Cash Flow

Calculation (example years are included as reference):

Most Recent Year Cash Flow: 2020 Cash and Investments minus 2019 Cash and

Investments Previous Year Cash Flow: 2019 Cash and Investments minus 2018

Cash and Investments Multi-Year Cash Flow: 2020 Cash and Investments minus  
2018 Cash and Investments

Data Source: Annual Fiscal Audit Report

Cash Flow and Multi-Year Cash Flow	
Exceeds Standard	The school has met standard for 3 or more consecutive years, including the most recently completed school year..
Meets Standard	<b>Multi-Year Cumulative Cash Flow is positive, and Cash Flow is positive in the most recent year is positive, OR Multi-Year Cumulative Cash Flow is negative, but documentation identifies this as a result of a one-time, planned purchase (such as a facility remodel).</b> <b>Note: Schools in their first or second year of operation must have positive cash flow.</b>
Approaches Standard	Multi-Year Cumulative Cash Flow is positive, but Cash Flow is negative in the most recent year.
Does Not Meet Standard	Multi-Year Cumulative Cash Flow is negative, and no documentation identifies this as a result of a one-time, planned purchase.



## 7. Debt Service Coverage Ratio

### Calculation:

If school owns its facility or if the school leases its facility and the lease is capitalized:  
(Net Income + Depreciation Expense + Interest Expense) divided by (Principal + Interest + Lease Payments)

If school leases its facility and the lease is not capitalized: (Facility Lease Payments + Net Income + Depreciation Expense + Interest Expense) divided by (Principal + Interest + Lease Payments)

Data Source: Annual Fiscal Audit Report

### Debt Service Coverage Ratio Rubric

Exceeds Standard	The school's debt service coverage ratio is 1.5 or greater OR the school operates debt-free.
<b>Meets Standard</b>	<b>Debt Service Coverage Ratio is between 1.1 and 1.49</b>
Approaches Standard	The school's debt service coverage ratio is between .9 and 1.09
Does Not Meet Standard	Debt Service Coverage Ratio is less than .9

## 8. Debt to Asset Ratio

Calculation: Total Liabilities divided by Total Assets

Data Source: Annual Fiscal Audit Report

### Debt to Asset Ratio

Exceeds Standard	The school has met standard for 3 consecutive years, including the most recently completed school year., OR the school operates debt-free.
<b>Meets Standard</b>	<b>The school's Debt to Asset Ratio is less than 0.9</b>
Approaches Standard	The school's Debt to Asset Ratio is between 0.9. and 1.0
Does Not Meet Standard	The school's Debt to Asset Ratio is greater than 1.0

## 9. Financial Compliance Rubric

Calculation: Total Liabilities divided by Total Assets

Data Source: Annual Fiscal Audit Report, Desk Audit of Policies, Other Formal Notifications Received by School

Financial Compliance Rubric	
Exceeds Standard	The school has met standard for 3 or more consecutive years, including the most recently completed school year..
Meets Standard	<b>Accounting Practices: finances are managed in compliance with GAAP. Financial Transparency: expenditures and contracts are posted on the school's site. Internal Controls: the school's internal controls are compliant.</b>
Approaches Standard	The school was informed of non-compliance with accounting practices, financial transparency, or internal controls, and prompt action to correct is in evidence.
Does Not Meet Standard	The school is operating under a notification of fiscal concern or a notification of possible or imminent closure OR the school was informed of non-compliance with accounting practices, financial transparency, or internal controls and the issues were not corrected within 30 days.

## **Appendix B: Conditions**

## Appendix B: Conditions of Renewal

1. Condition 1: SMS must successfully complete one of the following: (1) Achieve a proficiency rate on the spring administration of the statewide literacy assessment (currently the IRI) equal to or greater than the average proficiency rate of the Blaine County School District by June 30, 2023; or (2) SMS must increase the percent of continuously enrolled students who achieved proficiency on the statewide literacy assessment by at least 10% between the fall and spring administrations of the 2022-2023 school year. This condition must be met by June 30, 2023. This condition is based on the proficiency rate necessary to meet standard on this measure.

## **Appendix C: Charter**

# SYRINGA MOUNTAIN SCHOOL

**Cultivating the Head, Heart and Hands**

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

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

Initially submitted to Public Charter School Commission May 17, 2013

Contingent Approval Received on August 15, 2013

Full Approval Confirmed on October 1, 2013

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

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

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## **ACKNOWLEDGEMENTS**

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

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

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

**Our sincerest gratitude.**

**SMS Founders: Ben Rogers, Joy Spencer, Travis Scott, Phoebe Pilaro, Greg Bloomfield, Don Keller, Kate Sokoloff, Laurie Wertich**

## TAB 1 EXECUTIVE SUMMARY, VISION AND MISSION STATEMENTS

### EXECUTIVE SUMMARY

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

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

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

#### **What is Waldorf education?**

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

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

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

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

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

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

### **Waldorf or Waldorf-inspired?**

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

### **Where did the idea for the school come from?**

Our vision for a charter school using Waldorf-trained teachers and Waldorf methods began three years ago. The Wood River Valley is home to one of only two Waldorf schools in Idaho. For the

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

### **What does the research say?**

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

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

Waldorf students are less exposed to standardized testing; such tests are generally absent or minimal in the elementary school years. Despite this, U.S. Waldorf pupils' SAT scores have usually come above the national average, especially on verbal measures.<sup>3</sup> Studies comparing students' performance on college-entrance examinations in Germany found that as a group, Waldorf graduates passed the exam at double to triple the rate of students graduating from the state education system,<sup>4</sup> and that students who had attended Waldorf schools for their entire education passed at a much higher rate (40% vs. 26%) than those who only had part of their education at a Waldorf school.<sup>4</sup> Educational successes of private Waldorf schools may partially reflect the social status of their students.<sup>5</sup>

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

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

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

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

### **European schools Waldorf research**

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

A 2005 UK Department for Education and Skills report noted significant differences in curriculum and pedagogical approach between Waldorf/Steiner and mainstream schools and suggested that each type of school could learn from the other type's strengths: in particular, that state schools could benefit from Waldorf education's early introduction and approach to modern foreign languages; combination of block (class) and subject teaching for younger children; development of speaking and listening through an emphasis on oral work; good pacing of lessons through an emphasis on rhythm; emphasis on child development guiding the curriculum and examinations; approach to art and creativity; attention given to teachers' reflective activity and heightened awareness (in collective child study for example); and collegial structure of leadership and management, including collegial study. Aspects of mainstream practice which could inform good practice in Waldorf schools included: management skills and ways of improving organizational and administrative efficiency; classroom management; work with secondary-school age children; and assessment and record keeping. <sup>10</sup>

A 2006 PISA study of Austrian students found that Austrian Waldorf students are above average in science. The Waldorf students did best in understanding the questions raised

by science and the ability to solve scientific problems and were also above the OECD average for their joy and interest in science. <sup>11</sup> The authors concluded "The relatively high expertise in science among Waldorf students, in combination with their very high motivation and interest in these subjects, as well as the various pedagogical principles, suggest that regular schools can learn from the Waldorf schools, particularly with regard to concrete application to the sciences." <sup>12</sup>

## **Creativity**

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

## **At Risk Students**

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

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

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

The most comprehensive research to date on North American Waldorf graduates spanned 60 years of US and Canadian Waldorf high school graduates, from 1943-2005 produced these results. <sup>17</sup>



### WHERE DID THE RESPONDENTS ATTEND COLLEGE?

#### 20 Colleges and Universities Most Frequently Attended by U.S. Graduates

1. Oberlin College (incl. music conservatory)
2. University of California, Santa Cruz
3. Hampshire College
4. Boston University
5. University of California, Berkeley
6. Temple University
7. Smith College
8. New York University
9. Emerson College, Boston
10. Elmira College
11. Wheaton College
12. Wesleyan University
13. University of New Hampshire
14. Earlham College
15. Bennington College
16. Adelphi University
17. Sarah Lawrence College
18. Santa Rosa Junior College
19. Goddard College
20. Cornell University

#### 20 Colleges and Universities Most Frequently Attended by Canadian Graduates

1. Capilano College
2. Simon Fraser University
3. University of British Columbia
4. University of Toronto
5. Camosun College
6. Ontario College of Art & Design
7. University of Victoria
8. Burlington College
9. Carleton University
10. Concordia University
11. Dalhousie University
12. Emily Carr Institute of Art and Design
13. Hebrew University of Jerusalem
14. Malaspina University-College
15. McGill University
16. Memorial University of Newfoundland
17. NSCAD University
18. TEC de Monterey, Mexico
19. West Coast College of Massage Therapy
20. Toronto School of Homeopathic Medicine

### WALDORF GRADUATES EXCEED GENERAL U.S. POPULATION IN HUMANITIES AND SCIENCE MAJORS

Declared Majors	Waldorf Graduates between 1991–2002	General U.S. Population between 1991–2002
Arts & Humanities	39.8%	14.6%
Social & Behavioral Sciences	29.9%	10.9%
Life Sciences	9.9%	6.2%
Physical Sciences & Math	2.8%	2.0%
Engineering	1.8%	6.4%
Computer & Information Sciences	2.5%	6.1%
Education	2.1%	7.3%
Business & Management	4.6%	19.3%
Health	5.6%	11.6%
Other Technical & Professional	0.4%	9.7%
Vocational & Technical	0.7%	4.4%

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

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

### **Why the Wood River Valley?**

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

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

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

### **Who Syringa Mountain School will serve**

Syringa Mountain School is planned to open the fall of 2014, with students in Grades K–5 the first year and adding additional grades each subsequent year through 8<sup>th</sup> grade. The school will be located within or near the city of Hailey, Idaho. The school will be available to all Idaho students



with a primary attendance area consisting of Blaine County School District No. 61. Syringa Mountain School does not discriminate on the basis of race, religion, color, national origin, sex, or disability in providing education services, activities, and programs.

### **How student and school success will be defined**

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

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

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

These multiple measure, formal and informal approach to assessment is a critical component to schools employing Waldorf methodology. In a recent study, public Waldorf schools were compared to traditional public schools using their district standardized test scores in Reading and Math. Test score results suggested the Waldorf experience provided a slower academic build-up resulting in lower test scores in Kindergarten and the early primary grades followed by higher levels of advanced performance by the 8th grade.<sup>2</sup> This study as well as numerous earlier studies, suggest that public Waldorf schools are able to provide a more holistic experience for their students, while giving them the ability to be ultimately successful in academics over the course of a K-8 education.

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

### **Mission: Cultivating the Head, Heart and Hand.**

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

### **Vision**

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

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

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

- Reverence and stewardship for self, others and the earth.
- Creative and imaginative thinking.
- Critical thinking and good judgment.

- Literacy.
- Responsibility and self reliance.
- Lifelong learning.

## **TAB 2** PROPOSED OPERATION AND POTENTIAL EFFECTS OF THE PUBLIC CHARTER

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

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

#### **A. Founders**

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

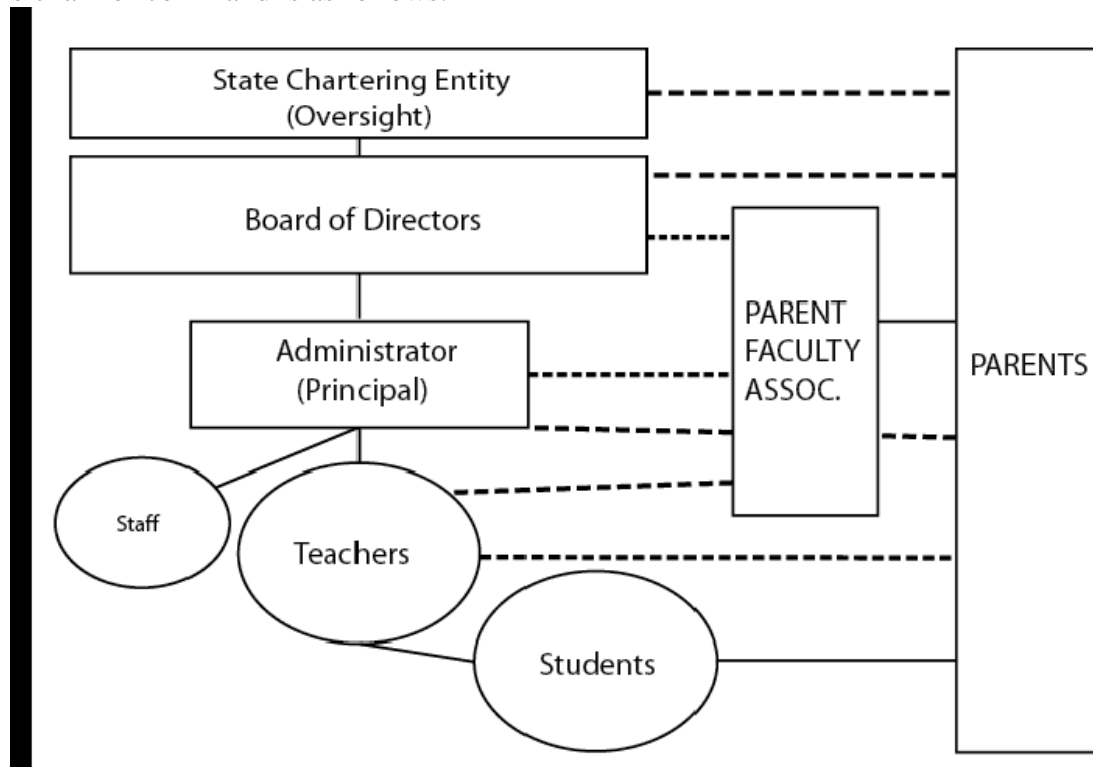
The Founders of Syringa Mountain School represent a larger group of interested and committed parents, educators, and community members (See Appendix D).

#### **B. Board of Directors**

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

### ***C. Organizational Flow Chart***

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



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

1. The Board, as a Board, will have the full power and duty to manage and oversee the operation of the Corporation’s business.
2. The Board will have the responsibility to approve the selection of the school Administrator, who may not be one of its members. The Board also will be responsible for hearing, and approving or disapproving, the recommendations of the school Administrator with respect to changes in staffing, programs, or curriculum.
3. The Board will, when necessary, adjudicates disagreements between parents and the administration.
4. The Administrator/Designee represents the Board as the liaison between the Board and SMS community.
5. A committee, not to exceed four (4) members, comprised of the Administrator/Designee and representatives of the Board and faculty will be responsible for hiring elementary (grades K-8) teachers.
6. The Administrator supervises, directly or indirectly, all employees of SMS. The Administrator will make the final recommendation to the Board concerning hiring per IDAPA 33-523.

7. The administrative staff's primary functions will be management of SMS and facilitation of the implementation of a quality educational program. It is the goal of the Board that the administrative organization:
  - a. provide for efficient and responsible supervision, implementation, evaluation, and improvement of the instructional program, consistent with the policies established by the Board;
  - b. provide effective and responsive communication with staff, students, parents, and other citizens; and
  - c. foster staff initiative and rapport.
8. SMS's administrative organization will be designed so that all divisions and departments are part of a single system guided by Board policies which are implemented through the Administrator.

#### ***D. Operation and Maintenance of Charter School Facilities***

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

#### ***E. Proof of Insurances***

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

#### **Potential Effects Idaho Code § 33-5205(4)**

Syringa Mountain School will actively recruit students from its primary attendance area, the Blaine County School District. Opening a charter school in Blaine County SMS the will directly impact the district financially.

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

District Superintendent Lonnie Barber also expressed concerns about a funding loss for the district, speculating that the majority of the charter school students would be taken from the district. "That's 120 kids that take \$5,000 each from the School District," Barber said. The Board Chair was also cited in the article as saying, School Board Chairman Steve Guthrie, who visited The Mountain School earlier that day, said: "I saw wonderful things going on. We want you to be successful, but we do have to ask tough questions

and sometimes it comes down to money.” (**Appendix M**) (The BCSD Board just passed a \$79 million budget for their 3402 student population as compared to SMS’s \$680,437 for 165 students. BCSD spends approximately \$13,009 per student compared to the state allocation of \$4277).

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

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

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

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

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

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

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

SMS has also been in discussion with the district on how SMS can benefit BCSD staff and students. **Appendix R** includes a letter of clarification to Dr. Barber and the Chair of the Board Mr. Guthrie outlining some of these benefits that had been discussed at a lunch meeting.



Additionally, it has been suggested to the Board and Superintendent that they a district liaison be provided from the district to serve on the SMS Board to facilitate mutually beneficial decisions and transparent communication.

### Target Market

SMS is a school of choice open to all interested Idaho students and their families living within the primary attendance area consisting of Blaine County School District No. 61. There is a proven demand that Blaine County, Idaho needs this type of education to take the form of a public school (**Appendix N**).

The Waldorf community in Blaine County began 7 years ago as The Mountain School (TMS), a private PreK-3 school. The ratio of private paying tuition families to scholarship requesting families has reversed over the 7 years forcing the school to close its doors. SMS\_anticipates attracting the families who attended the private school.

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

### Target Population and Primary Attendance Area

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

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

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

The new school will be located in the city of Hailey. The primary attendance area for Syringa Mountain School will be identical to the attendance boundaries of the present school district, Blaine County School District (BCSD). See **Appendix R** for primary attendance area map.

### Facilities *Idaho Code § 33-5205(4)*

The SMS Board recognizes the importance the physical plant plays in enhancing the instructional program. The goal of SMS is to provide a facility in a convenient location that will



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

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

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

### **Option 1**

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

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

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

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

## **Option 2**

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

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

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

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

## **Option 3**

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

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

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

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

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

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

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

#### **Option 4**

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

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

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

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

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

#### **Option 5**

The last option would be to lease an existing office/motel building temporarily while leasing the closed private school facilities for limited class sessions. A large part of SMS's curriculum is delivered through and using a farm, garden and wilderness setting. Office buildings typically have not had any yard or grass areas included. The Mountain School is located on 2 1/2 acres with an existing classroom building that can legally accommodate 40 students. An additional classroom inside the main home was used for a preschool and can accommodate 10 students. The property is located on the north end of Bellevue, but on the southern boundary of the city of Hailey. Due to the occupancy restrictions, the Board has discussed the possibility of leasing the

property for two smaller classes with the remainder of the school located in a separate location. They have also discussed using the campus to deliver the farm and garden curriculum having two classes of students spend the day at the site each week. One office and one motel are being considered. Because these are leased, the Commission staff indicated we would not need to complete the facilities template at this time. **Appendix E** includes a letter from the owners of The Mountain School indicating their willingness to lease the facilities. Appendix E also includes two emails discussing possible lease arrangements.

The lease of the school would include as follows:

- (1) Facilities, all currently utilized by The Mountain School:
  - (a) School Building, 2,000 sq. ft.
  - (b) Office, 400 sq. ft.
  - (c) Pre School Room, 300 sq. ft.
  - (d) Farm Yard, Garden, Playground, 1/2 acre
  - (e) Parking Lot
- (2) Term of one year with option to extend for three years,
- (3) Monthly rental rate equal to the market rate, currently approximately \$1,000,
- (4) SMS will pay all utilities

#### **Administrative Services** Idaho Code § 33-5205(4)

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

##### **A. Relationship with the authorizing chartering entity:**

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

##### **B. Staffing plan/number of employees.**

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

##### **C. Administrative services**

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

#### **D. The Administrator**

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

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

#### **E. Operational and reports**

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

#### **F. Services**

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

## **G. School Fiscal Year**

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

## **H. School Calendar**

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

## **I. Holidays/Commemorative Day**

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

## **J. Instructional Hours**

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

## **K. Records Management**

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

## **L. Non-Instructional Operations**

Contractor License, Surety Bonds, and Insurance: The school may hire staff or contract with a service provider for services such as transportation, food service, accounting, business management, or other business or educational services. All contract service providers are required to have adequate limits of liability insurance as determined by the Board or other state requirement and will maintain the same throughout any contract period. A list of all contracts identifying the party with whom SMS has contracted, the length of the contract, and the expenditures required by the contract must be submitted to the Authorized Chartering Entity for its review no later than thirty (30) days prior to the opening of school and thereafter, annually. No contract will be let to any contractor who is not licensed as required by the laws of Idaho. Before any contract is awarded to any person, such person will furnish



to SMS performance and payment bonds that will become binding upon award of the contract to a contractor as follows:

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

### **M. Day-to-Day Operations**

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

### **N. Insurance for Liability and Property Loss**

The Idaho Public Charter School Commission, Idaho State Department of Education and the Blaine County School District shall have no liability for acts, omission, debts or other obligations of SMS, except as may be provided in the Charter.

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

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

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

## TAB 3

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

#### EDUCATIONAL PHILOSOPHY

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

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

#### DEFINITION OF AN EDUCATED PERSON

##### Definition of an Educated Person

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

*An educated person must demonstrate:*

☐ REVERENCE AND STEWARDSHIP: A sense of reverence empowers students with the ability to develop an understanding and appreciation for the interdependence of all life. Students with a strong sense of reverence reflect this knowledge through conscientious respectful actions involving themselves, other people, and the world around them. They have appreciation for truth, beauty and the world. They connect with others. They are compassionate, communicative, grateful, and strive to build interdependent relationships, which positively impact the world.

☐ CREATIVE AND IMAGINATIVE THINKING: Creative and imaginative thinking empowers students with the ability to think unconventionally, to question assumptions, and to imagine new scenarios. Imaginative thinkers craft astonishing work because they recognize their creative capacities and celebrate them through a variety of artistic mediums. They also act on opportunities and show willingness to take reasonable risk.



□ CRITICAL THINKING AND GOOD JUDGMENT: Critical thinking and sound decision-making empower students with the ability to assess the credibility, accuracy, and value of the information that barrages them every day. Critical thinkers and wise decision-makers analyze and evaluate information while still honoring their intuitive capacities. They think through solutions and alternatives and explore new options if their approaches don't work. This often entails working well with diverse peoples to make reasoned, ethical decisions and take purposeful action.

□ LITERACY: Literacy empowers students with the ability to read, write, listen and articulate in compelling ways. Literacy goes beyond the traditional meaning to also include people who are mathematically competent, scientifically and technologically adept. They develop their creative and physical abilities as well.

□ RESPONSIBILITY and SELF-RELIANCE: A strong sense of responsibility empowers students with the ability to be vital, disciplined, and hard-working individuals. Responsible people take initiative, self-regulate, and are fully accountable for their own actions. They honor their capacities and have a *can-do* attitude. They follow-through on commitments and honor their word.

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

## How Learning Best Occurs

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

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

The founders of SMS believe that a Waldorf-based program has distinctive features that create an environment where learning best occurs:

### **Specially Tailored Curriculum:**

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

### ***Age-Appropriate Schooling:***

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

### ***The Teacher:***

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

### ***Teacher Looping:***

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

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

### ***Rhythms in Learning:***

The Waldorf-inspired approach sees consistency as a vital element of learning. During the school day the rhythm of learning ebbs and flows. There is a balance of experience between concentration and relaxation, mental and practical work, movement and stillness, listening and participation, observing and doing. Such rhythm sparks interest, maintains attention, and supports children physiologically. <sup>26</sup> Rhythms extend beyond the classroom walls on multiple levels. For instance, the school's master schedule of classes is set so students engage in most of their intellectual work in the early hours of the school day, when their brains are particularly alert. Another example of school wide rhythm is the celebration of the seasonal festivals, which provides a natural sense of continuity and connection. Parent-partners are supported in their efforts to establish clear and predictable patterns on the home front as well (bedtime rituals, sharing family stories, reading, chores, meals, etc.). As a result of these concerted efforts,

students are provided with a strong and secure foundation that fosters healthy development and resiliency.<sup>27</sup>

### ***The Role of the Arts:***

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

Research has proven that students who study the arts consistently perform better in academic pursuits.<sup>29</sup> Recent scientific studies show that music enriches a person's thinking capacities and overall well-being. In one study, researchers increased students' music lessons from one to five a week while cutting back on math and language studies. After three years these students were as good at math as those who had stayed in the standard curriculum, and even better at languages. Researchers also found the music students to be more cooperative with one another.<sup>30</sup>

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

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

### ***Learning from Whole-to-Parts:***

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

### ***Story and Ethics:***

Another key feature of the SMS learning program is *storytelling*. Stories direct attention to personal experience, thereby increasing students' "intrinsic" motivation to learn, as well as their sense of ethics. SMS teachers tell stories *from the heart* and in *their own words*. During Main Lesson teachers recite compelling stories to students of all ages. Classic literature and expository texts are also read at appropriate times after Main Lesson. Teachers make special efforts to use vivid language and imagery to spark the students' curiosity, hold their attention, and model high standards for speech. Through storytelling and the accompanying chalkboard drawings, students become enthusiastic participants in the learning process.

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

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

### ***Preservation of Childhood:***

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

### ***Imagination at Work:***

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

### ***Healthy Nutrition:***

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

### ***Physical Activity:***

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

### ***Parental Involvement:***

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

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

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

### ***Safe Environment:***

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

## **EDUCATIONAL PROGRAM**

Syringa Mountain School's curriculum places equal emphasis on a strong academic foundation, artistic expression, social development, and attention to the needs of each child. According to William Butler Yeats, "Education is not the filling of a pail, but the lighting of a fire." Waldorf education engages a child's intellect, imagination, will and sense of aesthetics. How a subject is taught is equally important as what is taught, hence the use of movement and arts in the curriculum. The research-based, time-tested pedagogical methods designed by Dr. Rudolf Steiner are at the heart of this mode of education. Waldorf methods inspire student volition, inquisition and creativity because classroom activities involve three key areas—the head (thinking), the heart (feeling) and the hands (willing). 40

**Some introductory highlights of the Waldorf approach to teaching:**

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

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

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

### ***Research Based Education:***

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

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

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



## Overview of the Curriculum Content

### Reading research

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

### From **Common Myths about Waldorf Education: Reading**

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

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

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

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

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

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

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

### ***Approach to Literacy:***

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

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

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

### ***Learning to Read:***

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



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

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

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

### **Handwriting research:**

Additionally, handwriting is key for learning, memory and creatively development. In many schools, handwriting is hardly taught any more. At Waldorf schools it is a mainstay of the curriculum throughout the elementary grades. New research shows that the fading art of handwriting can benefit children's motor skills and their ability to compose ideas and achieve goals throughout life. An article in the Wall Street Journal describes how, by using advanced tools such as magnetic resonance imaging, researchers are finding that writing by hand helps with learning letters and shapes, can improve idea composition and expression, and may aid fine motor-skill development. Another recent study demonstrated that in grades two, four and six, children wrote more words, faster, and expressed more ideas when writing essays by hand versus with a keyboard. Studies suggest there's real value in learning and maintaining this ancient skill, even as we increasingly communicate electronically via keyboards big and small. Indeed, technology often gets blamed for handwriting's demise. But in an interesting twist, new software for touch-screen devices, such as the iPad, is starting to reinvigorate the practice. <sup>47</sup>

### ***Reading to Learn:***

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

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

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

### ***Approach to Mathematics***

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

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

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

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

### ***Science through Observation***

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

### ***Role of Technology***

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

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

SMS has incorporated the technology recommendations from a number of Waldorf inspired charter schools, that assess technology skills and teach them in relation to the state mandated testing requirements. With the adoption of the Smarter Balanced Assessments, technology skills will be assessed in second grade in preparation for students taking computerized assessments in third grade.

### ***Humanities and Multiculturalism***

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

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

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

### ***Foreign Languages***

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

### ***Music***

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

### ***Practical Subjects***

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

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

### ***Interdependence and Stewardship:***

Another primary goal of the practical curriculum is to instill in students a deep understanding and respect for the interdependence between humans and the natural world. Students appreciate that every action impacts the environment, and that their choices have significant consequences for the natural world and other human beings. Students engage in learning experiences and activities that cross curricular boundaries, promoting a strong sense of environmental stewardship, community responsibility and service learning.

### ***Will and Work Ethic:***

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

### ***Physical Education and Games***

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

The Curriculum Framework is provided in **Appendices W**.

## Instructional Strategies

### *Main lesson*

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

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

□ *Stage Two* usually occurs the next day. After literally “sleeping-on” the previous day’s content, the children summarize it in their own words with minimal but conscious input from the teacher. In *Classroom Instruction that Works*, Dr. Robert Marzano established that summarization and effective questioning boost student achievement more than nearly any other known teaching strategies.<sup>48</sup> Research in cognitive psychology has found that long-term memory is greatly improved if students process material in a deep and meaningful way. Self-generated elaboration (as happens when a child retells or summarizes information) leads to better recall than mere study of material, as it establishes a long-term memory trace. In this way, the content becomes “owned” and “reconstructed” in new ways by the students. Retelling during Stage Two is consistently more vivid and integrated. The literal process of sleep is seen as an essential part of learning. Research corroborates that the brain processes sensory information in significant ways during phases of deep sleep.<sup>49</sup>

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

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

### *Teacher Art:*

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

### *Form Drawing:*

Form drawing, the freehand drawing of geometric shapes, is a subject taught in Waldorf-inspired schools that is not offered in most other schools. Students practice form drawing starting in first

grade and typically continue with it through fifth grade. The forms the children draw each year are chosen to resonate with the developmental challenges they typically experience that year and with the academic subjects they study in each grade. In fourth grade, for instance, the children work with fractions and so draw geometric forms that express fractions in visual shapes. Students also draw forms that relate to the cultures they are studying. In fifth grade, elaborate designs are derived from ancient Greece and Egypt as they study those cultures. Form drawing aims to develop specific qualities in students:

☐ *Concentration*: The children draw slowly and with care, trying to make each shape as well done as possible. Even “simple” forms require focus.

☐ *Hand-Eye Coordination*: Drawings are usually modeled from an example the teacher draws on the board, which requires the child to repeatedly look up at the example and back down to his or her own work.

☐ *Handwriting*: Children draw flowing shapes that are reminiscent of numbers, letters, and beautiful cursive handwriting.

☐ *Spatial Intelligence*: Form drawing requires students to distinguish between left and right, or top and bottom. This develops spatial intelligence, organization, and an understanding of how individual parts relate to the whole.

### ***Handwork:***

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

### ***Eurythmy:***

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

### ***Homework:***

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



responsibility, while providing parents the opportunity to be involved and stay current with their children's.

### ***The Place of Textbooks:***

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

### ***High-Quality Materials & Aesthetics:***

High quality materials, many of which are specially designed for the curriculum, further allow students the experience of success in their school activities, promoting self-esteem, a sense of value for quality work, and increased motivation for completing schoolwork in the classroom as well at home. In first through eighth grades specially designed main lesson books are used to allow students to create their own thematic subject books for each unit block. In the kindergartens and lower grades, age-appropriate play materials are selected or hand-made, and include wood, silk, wool, and other natural materials. Students feel more connected to the environment using materials made from the natural world. Students also tend to focus better and feel more relaxed and nurtured when warmly surrounded by an environment of beauty and simplicity, avoiding classroom décor that is too busy.

### ***School Day, School Calendar and Instructional Minutes:***

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

## **GOALS**

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

1. Mastery of the traditional Waldorf curriculum adapted for public schools and aligned to the Common Core Standards and Idaho State Standards as demonstrated by student progress reports (Whole Child Rubrics), End of Year Narrative Report, Individual Student Portfolio (Main Lesson Book Review) and the Measurable Student Educational Standards (MSES) See **Appendix V**.
2. REVERENCE AND STEWARDSHIP as evidenced by strong performance on Student Progress Reports (Whole Child Rubrics), End of Year Narrative Report, Individual Student Portfolio (Main Lesson Book Review) and the Measurable Student Educational Standards (MSES). Strategies for reaching this goal include science lessons delivered through daily animal husbandry and farm lessons that enable students to model and practice reverence for and responsibility to all living things.

3. CREATIVE AND IMAGINATIVE THINKING as evidenced by strong performance on Student Progress Reports (Whole Child Rubrics), End of Year Narrative Report, and Individual Student Portfolio (Main Lesson Book Review). Strategies for reaching this goal include daily main lesson book compositions, daily performance and practice in painting, handwork, flute, violin and storytelling; active participation and roles in plays and festivals.
4. CRITICAL THINKING AND GOOD JUDGMENT as evidenced by strong performance on Student Progress Reports (Whole Child Rubrics), End of Year Narrative Report, and Individual Student Portfolio (Main Lesson Book Review). Strategies for reaching this goal include teacher observation of student peer interactions, student work ethic, work quality and completion, and attitude.
5. LITERACY as evidenced by strong performance on Student Progress Reports (Whole Child Rubrics), End of Year Narrative Report, Individual Student Portfolio (Main Lesson Book Review) and the Measurable Student Educational Standards (MSES). Strategies for reaching this goal include adherence to a Waldorf inspired curriculum with strong emphasis on vocabulary development, storytelling, main lesson book creation, and taught in a developmentally appropriate manner based on student readiness.
6. RESPONSIBILITY and SELF-RELIANCE as evidenced by strong performance on End of Year Narrative Report. Strategies for reaching this goal include numerous opportunities for students to initiate animal husbandry and garden care, care in completion of main lesson books, attitude towards school, completion of school work and homework, social interactions with peers, self regulation. Additionally a rich array of stories with morals aligned to students' age and developmental level are incorporated into the curriculum that reinforce qualities such as responsibility, self-reliance, bravery, courage.
7. LIFE LONG LEARNING as evidenced by responses on student and parent survey results, and multi year performance comparisons on Student Progress Reports (Whole Child Rubrics), End of Year Narrative Report, and Individual Student Portfolio (Main Lesson Book Review). Strategies for reaching this goal include delivering all curriculum imaginatively and interdisciplinary so that students understand content in a larger context.

#### **EDUCATIONAL THOROUGHNESS STANDARDS** ([IdahoCode33-1612](#))

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

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

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

*Objectives:* The Syringa Mountain School will:



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

**Standard B: Educators are empowered to maintain classroom discipline.**

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

*Objectives:* The Syringa Mountain School will:

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

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

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

*Objectives:* The Syringa Mountain School will:

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

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

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

*Objectives:* The Syringa Mountain School will:

- Emphasize meaningful language experience in the language arts, enhanced by dramatization, memorization and a foreign language;
- Provide access to computers to teach students basic computer skills and, in the older grades, appropriate communication through technology (e.g., e-mail, Internet, on-line learning); and,

- Provide instruction in a foreign language. Knowledge of a second language is essential in many occupations. In addition, knowledge of a second language will boost English proficiency, improve memory and self-discipline, and enhance verbal and problem-solving skills (Gardiner, 2006).

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

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

*Objectives:* The Syringa Mountain School will:

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

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

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

*Objectives:* The Syringa Mountain School will:

- Provide a strong foundation in reading, writing, problem solving, math concepts, science, social studies, and computational skills;
- Enable students to develop the following intellectual habits important in the work place: adapting to new situations and responding effectively to new information; solving problems; locating and evaluating information from a variety of sources; making flexible connections among various disciplines of thought; thinking logically and making informed judgments; and,
- Enable students to develop the following personal habits important in the work place: accepting responsibility for personal decisions and actions; honesty, courage, and integrity; a healthy lifestyle; empathy, courtesy, and respect for differences among people; self-confidence; concentration and perseverance; responsible time management; assuming a fair share of the workload; and working cooperatively with others to reach group consensus.
- Encourage sustainable living practices.
- Encourage the effective use of technology as a tool in the workplace of the 21st century.

**Standard G: The students are introduced to current technology.**

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

*Objectives:* The Syringa Mountain School will:

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

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

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

*Objectives:* The Syringa Mountain School will:

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

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

### ***PLAN FOR STUDENTS WHO ARE ACADEMICALLY LOW-ACHIEVING***

SMS will make significant effort to respond to the personal and academic needs of each child, and to identify and serve those who are academically low achieving or not meeting with success in any dimension. The school's small size, student-staff ratios, and looping model allow educators to develop special sensitivity towards individual student needs and backgrounds. This translates into a nurturing learning environment with low-stress levels and maximized success. In combination with child study meetings, students' progress is monitored regularly and by multiple educators. Frequent parent contact, interpretation and translation services are also utilized to identify students before they fail.

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

#### ***Tier I: Prevention***

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

## ***Tier II: Identification and Selected Interventions***

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

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

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

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

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

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

### ***Tier III: SST Intensive Interventions***

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

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

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

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

#### ***A. Differentiated Instruction***

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

All gifted and talented (G/T) students have special needs; consequently, these students will be provided educational experiences that strive to meet those needs in the regular classroom as well as in special classes, seminars or workshops. The charter school environment allows for areas to be pursued beyond the scope of the regular curriculum, regardless of the student's areas of special talent. This will be accomplished through, but not limited to clustering, competitions, consultations, curriculum compacting, special topic classes, independent study, and interest-based workshops. For example, K-3 teachers address the core subjects at the same time of day (especially reading and math) and the students are moved to the "level" needed

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

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

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

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

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

#### **F. Goals**

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

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

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

**H. Parent Participation** The Board understands the importance of parent participation in their child's education. Consequently, SMS will make every effort to facilitate opens lines of communication with all parents/guardians/acting custodians. In accordance with Board policy and state and federal law, parents/guardians/acting custodians will receive written notice regarding identification, evaluation, and/or placement of their child in the G/T program.



Parents/guardians will be involved in all placement decisions regarding their child and have the right to request due process hearings at any time.

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

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

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

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

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

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

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

**A. Progression of Student through LEP Program**

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

1. Identify and assist LEP students.

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

## **B. LEP Program Goals and Procedures**

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

### **1. Program goals:**

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

### **2. Student Enrollment Procedures:**

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

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

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



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

#### **Level Descriptors:**

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

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

1. Score at the Fluent level overall (4 or 5) and EF+ on all sub domains tested on the IELA;
- AND one of the following:
2. Receive an Idaho Reading Indicator (IRI) score of at least a 2, or an Idaho Standards Achievement Tests (ISATs) or equivalent state assessment score that meets the "Basic" level; OR
  3. Demonstrate access to mainstream content curriculum in one of the following ways:
    - a. Consistent proficient scores on grade level benchmark unit assessment;
    - b. Qualified teacher observations that are based on language proficiency benchmarks and criteria, with supporting portfolio of student classroom work. Taking into consideration the State recommended exit criteria, SMS will detail exit criteria on the annual LEP Plans which are approved by the Board and submitted to the LEP Program Manager June 30th of each year.

#### **D. Return to LEP Program**

In instances when students who have been exited out of the LEP program still need more

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

1. Additional forms of monitoring an exited student will be:

- a. classroom teacher observations
- b. classroom or unit assessments
- c. student work
- d. other statewide assessments
- e. conversations with the student and parents

2. If sufficient evidence deems that a particular student needs to be placed back into the LEP program, SMS's testing coordinator/designee will make sure all documentation is placed in the student's cumulative file.

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

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

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

#### **F. Instructional Approach**

1. Our instructional approach is the SIOP model which encompasses the Language Experience Approach. Teacher preparation focuses on clearly defined objectives. Supplementary materials include charts, graphs, pictures, and illustrations. Our instruction builds on our students' prior knowledge and experiences in order to enhance their language learning. We also integrate content teaching with our English language teaching to gain the highest quality of instruction. Within the general education

classroom, teachers and para-professionals provide re-teach as indicated by individual needs. Teachers focus on academic language in their instruction.

2. Our LEP program includes integrated settings with small group interventions. The approach for specific students will vary according to the identified needs of each student. This is consistent with SMS's educational approach with the Special Education, Title 1 and Gifted and Talented programs.

3. The following are examples of some of the methods teachers will employ

- a. Extra-linguistic cues such as visuals, props, and body language (Parker, 1985).
- b. Linguistic modifications such as repetition and pauses during speech (Parker, 1985).

c. Interactive lectures with frequent comprehension checks. d. Cooperative learning strategies (Kagan, 1985).

e. Focus on central concepts rather than on details by using a thematic approach.

f. Development of reading strategies such as mapping and writing to develop thinking (Langer & Applebee, 1985).

4. The Administrator/Designee will monitor the program through the Sheltered Instruction Observation Protocol (SIOP) model to ensure teacher follow through. Teacher's aides and Administrator will constantly evaluate student progress, but test data monitoring progress will be the best and most accurate measure of progress.

5. The specific curriculum has not been identified at this time. SMS will counsel with reputable entities and the authorized chartering entity and utilize recommended resources and products, including those suggested by the Idaho Department of Education's website, to determine the curriculum that will best meet the needs of our students. In addition, we would like the Administrator, the Board, the staff and possibly the authorizer, to be involved in the decision as to which curricular choices will best serve our specific population.

## **G. Additional Support**

1. Students not achieving at expected levels may receive additional help with the infusion of a pullout program, in which the student is temporarily removed from the classroom for specialized attention. The pullout program will be run by an appropriately qualified aide.

2. The elementary instruction is centered on specially designed academic instruction in English. The educational approaches chosen for implementation will reflect the demands of a high level of diversity in the LEP population and will be based on sound research.

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

## **H. Staff**

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

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

## **I. Professional Development**

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

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

## **J. Entrance/Exit Criteria**

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

## **K. Equal Access to Other School District Programs**

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

1. LEP students must take the ISAT and IRI tests or required state tests. However, there are some exceptions for LEP students, which are described below. All tests should be given in English; however, the Spanish IRI may be given to determine fluency in the native language and to assist with student educational learning plans. A person who scores a 3-4 on the Spanish Woodcock- Munoz is able to administer the Spanish IRI for a student.
2. ISAT or other state required assessments SBAC, SBAC Alt
  - a. All LEP students must take the ISAT or other state required assessments SBAC, SBAC Alt.

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

## **L. Parent and Community Involvement**

SMS will communicate in writing with all parents.

### **Notification of Placement and Parental Rights**

1. Using the appropriate language, the school will inform the parents that their student(s) has been placed in an instructional program for English language learners, no later than 30 days after the beginning of the school year. Or, if the student is identified after the beginning of the school year, the district/school shall notify parents within the first two weeks of the child being placed in a program for ELL students. The notification must include the date it is sent and the date of enrollment of the student. Notification will be provided in the appropriate language for the parent.
2. The following information should be included in the Notification of Placement:
  - a. The reasons for the identification, which may include results from a proficiency test, other test data, teacher, parent or self-referral. Multiple criteria for identification are strongly advised.
  - b. The student's level of English proficiency, how such level was assessed, and the status of the student's academic achievement, including the name of the test and the date the test(s) was administered.
  - c. Methods of instruction used in the program in which the LEP student is or will be participating in.
  - d. Methods of instruction used in other available programs, including how such programs differ in content, instructional goals, and the use of English and a native language of instruction.
  - e. How the program in which the student is, or will be participating in, will meet the educational strengths and needs of the student.

- f. How the program will specifically help their child to learn English and meet age appropriate academic achievement standards for grade promotion and graduation.
  - g. The exit requirements, including the expected rate of transition from such program into English only instruction classrooms.
  - h. How the program meets the objectives of the individualized education program of a child with a disability.
  - i. Information pertaining to parental rights that include written guidance on:
    - 1). the right that parents have to have their child immediately removed from the program upon their request;
    - 2). the options that parents have to decline to enroll their child in the program or to choose another program or method of instruction, if available;
    - 3). the assistance available to parents in selecting among various programs and methods of instruction, if more than one program or method is offered by the district or school.
3. Open meetings will be conducted throughout the year with appropriate interpreters present.

#### **M. Program Evaluation, Review, and Improvement**

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

#### **N. Using Data to Drive Decision Making for LEP Programs**

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

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

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

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

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

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

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

## **O. Budget**

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

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

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

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

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

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

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



## ***PLAN FOR SPECIAL EDUCATION***

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

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

### ***Section 504***

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

#### ***A. Free and Appropriate Public Education (FAPE)***

1. Compliance with Federal and State Law. The Board acknowledges the right of every student to receive a quality education; consequently, SMS will comply with all federal and state laws associated with special education, including but not limited to, Section 504 of the Rehabilitation Act of 1973 (Section 504), the Individuals with Disabilities Act (IDEA) of 2004, Title II of the Americans with Disabilities Act (ADA) of 1990, Idaho Code §33-2001 through 2002, §33-2004 through 2005, §33-2010, and 08.02.03.109. The SMS Special Education administrator will be the IDEA, Section 504, and ADA Compliance Officer.
2. “Idaho Special Education Manual”. SMS board will adopt as policy and comply with the most up-to-date version of the “Idaho Special Education Manual Revised 2009 and replacement pages.” The “Idaho Special Education Manual” will guide all special education services, data collection, and monitoring requirements, and will be used for identifying, evaluating, programming, developing individualized education plans, planning services, informing about the discipline policy, budgeting, and providing transportation for special needs students, as necessary. Electronic copies of the manual will be available on the school website. The section specifically addressing charter schools will be referenced, Primer on Special Education for Charter Schools revised 2007.
3. Differentiated Instruction. “Differentiated instruction” is a method of teaching that involves matching learning styles with abilities. This type of teaching is inclusive of many strategies and techniques that best suit the needs of the students at any one time. Specifically, differentiated instruction is flexible and constantly changing to meet



existing needs.” All successful teachers differentiate instruction to meet their student’s needs.

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

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

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

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

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

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

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

needs. The appropriate personnel will consult with the general education staff to utilize effective classroom interventions, adaptations, and modifications.

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

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

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

11. Least Restrictive Environments (LRE). In compliance with the "Idaho Special Education Manual" and as identified on each student's IEP, SMS will provide special education and related services to eligible students in the Least Restrictive Environment (LRE). Depending on the needs of individual students, the LRE will be SMS, another local school district site, or other alternative site. Multidisciplinary IEP team LRE decisions will be made individually for each student. The following criteria will be considered in the decision-making process:

- a. Based on student's IEP: The student's IEP is developed prior to the determination of the location of services and settings. The services and settings needed by each student with a disability must be based on the student's IEP and unique needs that result from his or her disability, not on the student's category of disability.
- b. Age Appropriate Peers: Students with disabilities will be educated with age-appropriate peers to the maximum extent appropriate. A student with a disability is not removed from age-appropriate general education environments solely because of needed accommodations and/or adaptations in the general education curriculum.
- c. School of Attendance: A student with a disability will be educated in the school as close as possible to the student's home and unless the IEP requires some other

arrangement, the student is educated in the school he or she would attend if not disabled.

d. Harmful Effects: Consideration will be given to any potential current or long term harmful effect on the student or on the quality of services the student needs, including the student's ability to graduate and achieve their post high-school goals.

e. Supplementary Aids, Services, and Other IEP Considerations: A student with a disability is not removed from general education settings solely because of needed accommodations and/or adaptations in the general education curriculum. SMS will provide all necessary supplemental aids, services, and other IEP considerations as deemed appropriate by the IEP Team whether or not these services are currently in place. Supplementary aids and services may include general education curriculum accommodations and/or adaptations, support from school staff, positive behavioral intervention plans, extended school year services, transportation, transition services, assistive technology services, adaptive technologies, travel and Positive Behavioral interventions.

f. Participation in Nonacademic and Extracurricular Services and Activities: A student with a disability will be allowed to participate with students without disabilities in nonacademic and extracurricular services and activities to the maximum extent appropriate. These services and activities may include meals, recess, field trips, counseling services, athletics, transportation, health services, recreational activities special interest groups or clubs sponsored by the school, referrals to community agencies, career development, and assistance in making outside employment available. The IEP team determines the supplementary aids and services that are appropriate and necessary for the student to participate in nonacademic settings and extracurricular services and activities.

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

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

a. Grades cannot be modified on the basis of special education status alone. b. Nondiscriminatory titles may be used for classes, report cards, and transcripts to designate adaptations or accommodations in general education classes. c. The

provisions of adaptations or accommodations will be spelled out in the student's IEP. d. Collaborative grading between general education teachers and special education teachers will be encouraged and considered appropriate. The grading procedure will be spelled out in the IEP. e. Kindergarten through eighth-grade report cards may have asterisks or other identification stating the class was from special services, (i.e., resource room, enrichment class, speech therapy, etc.)

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

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

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

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

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

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

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

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

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

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

If parents disagree with the determination, a request for a due process hearing may be made.

Two separate processes will be followed for due process. The state due process for IDEA will be followed as per state policy and the federal process for 504 will be followed as per federal guidelines. Appeals may be taken as provided by law. The parent may contact the **Office of Civil Rights**, <https://www.seattle.gov/civilrights/contact.htm>,

Central Building 810 3rd Avenue Suite 750. Seattle, WA 98104-1627. (206) 684-4500.

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

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

school), including the name of the party, the date access was given, and the purpose for which the party is authorized to use the records.

### **Dual Enrollment**

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

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

## TAB 4

### MEASUREABLE STUDENT EDUCATIONAL STANDARDS (MSES) METHODS FOR MEASUREING STUDENTS PROGRESS; ACCOUNTABILITY AND SCHOOL IMPROVEMENT

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

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

#### Syringa Mountain School measurable student academic standards:

1. *By the end of the 2015-2016 school year, at least 65% of SMS 1<sup>st</sup> – 5<sup>th</sup> grade students will give favorable responses\* on the Tripod survey regarding their teachers' effectiveness in implementing the 7Cs of Effective Teaching.*
2. *By the end of the 2015-2016 school year, at least 65% of SMS 3<sup>rd</sup> - 5<sup>th</sup> grade students will demonstrate engagement in learning based on favorable responses\* on the Student Engagement questions on the Tripod survey.*
3. *By the end of the 2015-2016 school year, at least 65% of SMS 1<sup>st</sup> -2<sup>nd</sup> grade students will demonstrate happiness with their school experience at SMS based on favorable responses\* on the Happiness questions in the Tripod survey.*
4. *By the end of the 2015-2016 school year, at least 65% of SMS 3<sup>rd</sup> – 5<sup>th</sup> grade students will demonstrate that they feel the school's learning environment is positive and supportive based on favorable responses\* on the School Climate section of the Tripod survey.*

\*For the purposes of evaluating SMS’s progress towards meeting the established measurable student educational standards, "favorable responses" on the survey are responses of 4 or 5 on the 5-point scale.

#### Testing: Ref. Idaho Code § 33-5205(3)(d)

A 95% participation rate will be expected of SMS students on state assessments. Early and consistent communication with parents about the purposes of the assessments and communicating the assessment results to parents in a timely manner, will facilitate SMS reaching this goal.

The students at WRWMS will be evaluated using the same standardized tests as other Idaho public school students. Those state-mandated tests provide information about areas of deficiency as well as areas of proficiency to the school and stakeholders. If the school is deficient in a core area (math, English, science, or social studies), there will be administrative guidance to correct



the shortcoming. This will be accomplished through intensive focus on all possible causes for the deficiency.

The testing coordinator maintains testing records. Test results will be entered into the student management software program granting teachers access to the scores applicable to their students. Additionally, the testing coordinator will keep a hard copy in a file of all test scores.

During a collaboration at the start of every school year, all teachers will receive the scores their students earned the previous year, and will individualize the student's education accordingly. Teachers will move students into the appropriate reading level and math level. If needed, and if possible, classes might be added to the curriculum to accomplish proficiency in some area. If there is a distinct problem in one subject area, appropriate training and/or personnel changes will be considered.

The data will also guide the efforts of the charter school administrator and faculty to work together to make instruction match student needs by altering and perhaps changing instructional approaches, adding instructional time for specific areas of study, adding paraprofessional help in the classroom, changing the curriculum, and/or appropriate personnel changes.

### **Methods for Measuring Student Progress**

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

### ***Student Progress toward the Established MSES***

SMS will use the Tripod survey to evaluate and report on progress towards the measurable student educational standards (MSES) that relate closely to the school's mission and educational program. The Tripod Project® has been working with schools, districts, and states for a decade researching how students experience teaching and learning in the classroom. Since 2009, Cambridge Education and the Tripod Project have been involved in the Measures of Effective Teaching (MET) Project, a large scale research project supported by the Bill and Melinda Gates Foundation, developing and vetting student perception surveys. Of significance, the MET Project found that there was a valid link between student achievement and student survey results, and that survey results are a stable, reliable measure.

The Tripod survey is an attitudinal survey that will be administered to appropriate groups of SMS students in alignment with the established MSES. The survey will be facilitated by SMS staff in electronic and/or hard copy format, depending on the age of the students. After any hard copy surveys are entered into the electronic database, the Tripod Project® will complete data analysis and provide SMS with a report.

Due to the large expense associated with administration of the survey, SMS will not administer the survey or report results to the PCSC annually. At a minimum, the survey will be



administered in the year preceding a renewal decision. Results will be reported by the school to the PCSC by October 1 of that same year.

### **Reporting Results**

Annual reports will be made to the Idaho State Department of Education and PCSC providing formative and summative data to demonstrate that the school is meeting all the performance standards prescribed by the State and other standards still under construction. This data can include emerging Idaho State Department of Education standards, benchmarks and/or SMS-developed criteria.

Non-student specific MSES results will be made available to parents and other stakeholders on the school website within 30 days of receipt of the data. Student-specific data will be shared with parents at student-led parent-teacher conferences at least twice a year.

### **Additional Methods for Measuring Students Progress Idaho Code § 33-5205(3)(d)**

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

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

SMS will also use a variety methods to measure student progress and to evaluate all realms of the child's development, including his/her: Intellectual Capacity (mind); Physical Capacity (body); and, Social-Emotional capacity (heart). SMS educators provide a variety of descriptive feedback to students and families within a non-competitive learning environment.<sup>51</sup>

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

**Parent-Teacher Conferences** for all students take place at least twice a year, or more, if dictated by individual circumstances. Parents, teachers or students may make requests for

additional conferences. These conferences are essential in that they allow a complete picture of the child's performance to unfold. Moreover, they provide opportunities for teachers and parents to strengthen school-family partnerships. Conferences are especially effective as a result of the school's looping model, low teacher-student ratios, and warm community atmosphere.

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

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

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

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

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

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

**External School Evaluation:** The school will typically engage an independent knowledgeable evaluator from outside the school community. Evaluation includes an assessment of the instructional program as well as other qualitative and quantitative information about school operations, culture and teaching. This ensures the school is adhering to its mission and meeting

its intended goals. External evaluation is also part of the AdvanceED accreditation cycle. See Strategic Planning Cycle above.

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

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

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

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

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

### State Accreditation

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

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

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

SMS concurs with leadership consultants Timothy Watters <sup>54</sup> and Jim Collins when they assert that effective instructional leadership provided by the Administrator is essential for high student achievement. Within this collaborative context, the administrator manages the assessment program by analyzing qualitative and quantitative achievement data and then regularly making recommendations to the SMS Faculty and Board.

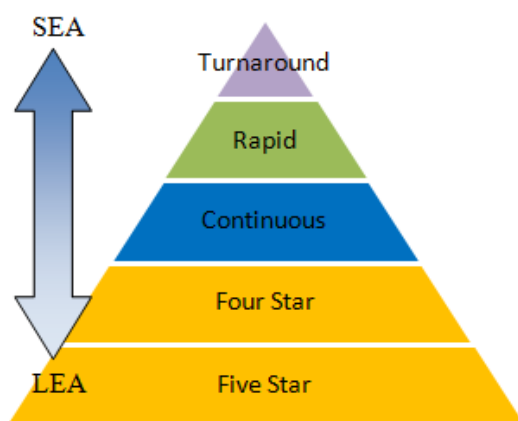
### Accountability and School Improvement

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

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

If authorized by the State Charter School Commission, the SMS Board will develop and implement the School Improvement Plan. If SMS is required to implement a Turnaround Improvement Plan, the SMS Board will work with an independent consultant to determine the most appropriate staffing model.

#### 2012-2013 School Level Improvement Plans



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

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

1. Reading, mathematics, and language usage achievement (proficiency) designations for all

students;

2. Graduation rates for all students;
3. Growth and growth toward proficiency for all students and subgroups over time; and
4. For schools with grade 12, increasing advanced opportunities and ensuring college readiness through college entrance and placement exams.

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

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

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

1. *Transformation model*, which addresses areas critical to transforming persistently low achieving schools. These areas include: developing teacher and Administrator leader effectiveness (depending on the track record of the Administrator, this could mean replacing the current administrator), implementing comprehensive instructional reform strategies, extending learning time and creating community connections, and providing operating flexibility and sustained support.

2. *Turnaround model*, which includes, among other actions, replacing the Administrator and rehiring up to 50% of the school's staff, adopting a new governance structure, and implementing an instructional program that is research-based and vertically aligned from one grade to the next as well as aligned with the State's academic standards. A turnaround model may also implement other strategies such as any of the required and permissible activities under the transformation model or a new school model (e.g., themed, dual language academy).

3. *Governance Partnership Model* in which the Board/school partners with an external entity to implement the Turnaround Principles and transform the governance of the school. This may include:

- a. Agreeing to utilize services provided directly to the school by the state in lieu of a state takeover in which a diagnostic review is conducted and services are tailored specifically to the context of the school;
- b. Purchasing the services of a lead turnaround partner that will utilize research-based strategies, that have a proven record of success with similar schools, and which shall be a key participant and decision-maker in all aspects of developing and collaborative executing the turnaround plan;

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

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

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

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

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

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

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



## **TAB 5** GOVERNANCE, PARENTAL INVOLVEMENT, AUDITS

### Governance Structure

#### Board of Directors

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

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

#### **PRINCIPLES**

*Govern as Stewards*

*Establish Organizational Purpose*

*Exercise Fiduciary Responsibility*

*Delegate Authority and Ensure Accountability*

*Speak and Act as One*

#### **BOARD RESPONSIBILITIES**

- Uphold* by-laws, Code of Conduct, operating principles, and other policies
- Develop, review and approve* policies
- Establish and uphold* the school's mission, vision, and core values
- Support and promote* the school
- Build strategic alliances*
- Safeguard* stakeholders' right to safety in the school
- Safeguard the school's finances and property*
- Grow the school's resources*
- Support and promote* fundraising efforts
- Ensure legal and financial stability*
- Provide* oversight or final approval of hiring, dismissal, job descriptions and employment agreements
- Provide* oversight or final approval of expulsions
- Delegate* authority to School Administrator
- Ensure attainment of performance outcomes*
- Maintain* clarity of roles and responsibilities within the governance structure
- Uphold* by-laws, charter, code of conduct, operating principles, policies, and meeting agreements or norms
- Redirect* operational conversations to appropriate staff
- Ensure Board* business is done within the framework of Board meetings, as per applicable open meeting laws

### *Do What Matters Most*

-*Monitor* school's progress on performance outcomes

-*Adopt* Board policy

-*Oversee* school financial health

### *Invest in Our Capacity*

-*Engage in ongoing and focused professional development*

-*Schedule* capacity-building opportunities

-*Recruit and seat* capable, qualified and diverse Board members

-*Evaluate* Board's performance

As outlined in Section 4.7, upon taking the Oath of Directors, Board members are required to sign and abide by the Code of Ethics for School Board Members. (**Appendix A**)

### ***Non Profit Corporation***

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

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

### **Transition from Founding Board to Governing Board**

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

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



Staggered terms for Board members ensure the founders are replaced systematically during the first three years of the schools' operation. In this way, the working memory and original purpose of the organization are preserved at the same time new ideas and directions are initiated.

In the case of SMS, it is anticipated that two of the founding board members will step down to become school employees. Additionally, the founding board, established in August 2012, has been slowly adding board members as the areas of expertise needed on the board are identified. In this way, new members have been brought on approximately every two months during the past year, oriented and participated throughout the formation period of the board.

Also in the case of SMS, no single "founder" initiated the school. A group of parents and teachers initiated the new school process and have been guiding and overseeing it as an individual was recruited to write the petition, apply for non-profit status, etc. SMS has been founded on a shared leadership and decision making model, as evidenced by this petition. Each board member took responsibility for the area they held expertise in, and chaired or worked on each committee to ensure the work was completed for the petition to be submitted.

### **Board Recruitment**

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

School Board policy will be written and adopted regarding composition, purpose, and operating parameters of Board appointed Advisory Committees. At a minimum, each advisory committee will be lead/chaired by at least one Board member. Committee members will be solicited and selected by the Committee chair. If at all possible, committee selection will represent the different school interests, demographics and constituents including parents, community members, business, and students if and when possible.

## Idaho State Department of Education

Charter School

Board and Committee Member Matrix

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

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

Mark qualifications desired for each position with an "X"

List all board positions

If candidate has a desired qualification, note in bold

If candidate has another qualification, note with "+"

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

## Board Training and Evaluation

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

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

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

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

## Evaluation of the Board of Directors

### Board Self Study

The evaluation of the Board of Directors will take place one month before elections are scheduled. The evaluations will be self-evaluations provided by the ISBA and the Board will be guided through the process by the ISBA. The data gathered from the annual Board assessment will be used to inform future board and committee composition, board functioning as well as professional development needs.

### Open Meeting Law and Public Records Law

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

### Administrator

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

#### PRINCIPLES

##### *Ensuring Organizational Focus*

#### ADMINISTRATOR RESPONSIBILITIES

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

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

### *Developing People*

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

- ☐ Offering intellectual stimulation
- ☐ Providing support and opportunities for growth
- ☐ Being an appropriate role model
- ☐ Empowering others to make decisions
- ☐ Providing instructional coaching
- ☐ Advocating for powerful teaching and learning
- ☐ Nurturing the development of families and parents
- ☐ Selecting, coaching, and retaining excellent staff
- ☐ Facilitating meaningful staff evaluation
- ☐ Ensuring the safety of all constituents
- ☐ Overseeing student admissions, attendance and student records
- ☐ Supporting Staff Council functions such as record keeping and agendas
- ☐ Providing direction, accountability and inspiration

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

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

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

## **Staff**

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

## **The Staff Council**

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

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

## **Roles & Responsibilities:**

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

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

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

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

## **Parent Advisory**

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

## **Parent Involvement**

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

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

One of the most unique features of Syringa Mountain School is its proposed high level of parental involvement. Beyond involvement as a member of the SMS Parent Advisory, parents/guardians who choose SMS for their children are asked to give an average of five hours per month or fifty hours over the course of the school year towards various volunteer opportunities that may include: playground supervision, assisting in the classroom, site

maintenance, fundraising, hospitality, room parenting, serving on a Committee, attending parent education evenings.

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

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

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

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

**Audits :** [Ref.](#) Idaho Code § 33-5205(3)(k), 33-5206(7), 33-5210(3), and 33-701(5-10)

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

#### **Annual Financial Statement 33-701(6)**

SMS's Board will have prepared and published, within one hundred twenty (120) days from the last day of each fiscal year, an annual statement of financial condition and report of the school as of the end of such fiscal year in a form prescribed by the State Superintendent of Public Instruction. Such annual statement shall include, but not be limited to, the amounts of money budgeted and received and from what sources, and the amounts budgeted and expended for salaries and other expenses by category. Salaries may be reported in gross amount. SMS shall have available at the school office, upon request, a full and complete list of vendors and the amount paid to each and a list of the number of teachers paid at each of the several stated gross salary levels in effect in the district.

#### **Additional or Supplementary Statements and Reports**



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

#### **Publication of Annual Financial Statement IC33-701(5)**

The annual statement of financial condition and report shall be published on the SMS website and within the time above.

#### **Certification of Annual Financial Statement**

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

#### **Failure to Prepare and/or Publish Annual Financial Statement**

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

#### **Financial Audit IC33-701(6)**

1. SMS will cause to be made a full and complete audit of the financial statements of the school as required in section 67-450B, Idaho Code.
2. The auditor shall be employed on written contract.
3. One (1) copy of the audit report shall be filed with the State Department of Education, after its acceptance by the Board, but not later than November 10. If the audit report is not received by the State Department of Education by November 10, the Department may withhold all or a portion of the district's November 15 distribution made pursuant to section 33-1009, Idaho Code, for noncompliance with the audit report deadline. Provided however, SMS may appeal to the State Board of Education for reconsideration, in which case the State Board of Education may reinstate or adjust the funds withheld.
4. In the event the State Department of Education requests further explanation or additional information regarding SMS's audit report, SMS shall provide a full and complete response to the State Department of Education within thirty (30) days of receipt of the State Department's request. If SMS fails to respond within the thirty (30) day time limit, the State Department of Education may withhold all or a portion of SMS's next scheduled distribution to be made pursuant to section 33-1009, Idaho Code. Provided however, SMS may appeal to the State Board of Education for reconsideration, in which case the State Board of Education may reinstate or adjust the funds withheld.



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

**Required Report Filing IC33-701(7)**

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

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

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

**Budget Review IC 33-701(9)**

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

**General Funds IC33-701(10)**

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

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

### **Employee Qualifications:**

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

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

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

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

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

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

### **Collective Bargaining**

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

### **Health and Safety Procedures: Ref. Idaho Code § 33-5205(3)(h)**

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

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

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### **SMS Definition of School Climate**

School climate refers to the quality and character of school life. School climate is based on patterns of students', parents' and school personnel's experience of school life and reflects norms, goals, values, interpersonal relationships, teaching and learning practices, and organizational structures. A sustainable, positive school climate fosters youth development and learning necessary for a productive, contributing and satisfying life in a democratic society. This climate includes:

- Norms, values and expectations that support people feeling socially, emotionally and physically safe.
- People are engaged and respected.
- Students, families and educators work together to develop, live and contribute to a shared school vision.
- Educators' model and nurture attitudes that emphasize the benefits and satisfaction gained from learning.
- Each person contributes to the operations of the school and the care of the physical environment.

*(This definition of school climate and a positive, sustained school climate were consensually developed by the National School Climate Council that NSCC co-leads with the Education Commission of the States.)*

### **Components of a School Climate**

Upon authorization, the Board will adopt policies/procedures in the following areas referencing the ISBA, BCSD and Sage International School policies. (See sample policies below)

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

1. Provide for inspection of the facility in compliance with Idaho Code § 39-4130, and adopt policies to meet all required city, state, and federal health, accessibility, safety, fire, and building codes for public schools.
2. The facility will pass inspection by fire and safety officials using the same guidelines for all public schools;
3. Fire and evacuation drills will be conducted during the first week of school, monthly and during the first week back after extended breaks;
4. Maps illustrating fire exit routes will be posted near the exit in every room;
5. All staff will be trained in procedures outlined in the public schools' Emergency Handbook;
6. All visitors and volunteers will be required to check in at the office and to wear an identification badge;
7. Student check out during the school day will require the person picking up the child to sign the child out at the office and to produce appropriate photo identification;
8. All state rules and regulations for student safety will be followed;
9. A health/nurse room will be furnished and supplied adequately for the number of students in the school.
10. Health records highlighting chronic issues will be held on each student and made available in emergencies;
11. Emergency contact numbers will be maintained on all students;
12. Require that all students show proof of immunization before being enrolled at SMS or have an exemption signed by a parent or legal guardian.
13. All staff will be trained in universal medical and health precautions including communicable diseases;
14. First aid kits will be furnished, easily accessed and a portable first aid kit taken for all off campus excursions.
15. SMS will adopt a policies addressing bullying/harassment
16. All employees will be screened by law enforcement agencies.
17. Adopt and implement a comprehensive set of health, safety, and risk management policies. These policies will be developed in consultation with SMS's insurance carriers and at a minimum address the above and the following items:
  - a. Policies and procedures for response to natural disasters and emergencies, including fires and bomb threats.
  - b. Policies relating to preventing contact with blood-borne pathogens.

- c. A policy requiring that all staff receives training in emergency response, including appropriate “first responder” training. All staff will be trained in emergency response protocols and will be provided an emergency response binder. SMS will create an emergency response team that will develop school protocols and procedures. The team will meet at least twice a year to review the protocols and recommend needed changes.
  - d. Policies relating to the administration of prescription drugs and other medicine.
  - e. A policy that the school will be housed in a facility that has received fire marshal approval and has been evaluated by a qualified structural engineer who has determined the facilities present no substantial safety hazard.
  - f. Policies establishing that the school functions as a gun-, drug-, alcohol-, and tobacco-free workplace.
18. SMS will develop a policy regarding internet usage and comply with all requirements set forth in the Children’s Internet Protection Act. See **Appendix P** Student Handbook for Digital citizenship agreement.
19. SMS will include the following Media Viewing Policy:
- The violence, consumerism and passive entertainment that are taken for granted in today’s mass-media culture do not support the well being of children. The cumulative effect of repeated exposure to television, video games, movies, radio and computers can negatively impact a child’s development. At Desert Marigold, we strongly encourage parents to take full responsibility for determining the type and extent of screen viewing (video games, game-boy, x-box, computers, etc.), and media exposure (television and DVD) their children receive. Your child’s teachers will be providing information regarding media use and your child’s education and engaging you in a dialogue that we hope will be stimulating and rewarding. Our goal in doing so is to do our utmost to create a learning environment that is conducive to active, imaginative learning.
- Our recommended guidelines regarding media use are as follows:
- 1. For children in preschool and kindergarten: None, or as little as possible.
  - 2. For children in grades 1 – 3: No television, video games, computers or movies during the school week; minimal parent-directed media use on weekends and during vacations.
  - 3. For students in grades 4 – 8: No television or video games or computers in the morning before school; minimal parent-directed media use during the school week; parental involvement in determining appropriate media and computer-use choices at all other times.

### ***Student Discipline: Practices and Policies***

#### ***Practices:***

#### ***Student Behavior Expectations***

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

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

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

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

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

SMS models their student discipline practices and procedures after Non-violent Communication protocol and Teaching with Love and Logic (See **Appendix U**).

**Expectations in Early Childhood Classes (Classroom management)** Discipline at SMS emphasizes a positive approach where the young child is gradually led toward an experience of self discipline. We expect children to behave in an age appropriate, respectful way towards adults, classmates, and school and personal property. Teachers use discretion in handling each circumstance using the following guidelines:

**Respectful, Calm & Clear Communication:** We keep our language simple and try not to use too many words. We use simple, basic imaginations and metaphors to get our point across and avoid over-intellectualizing.

**Encouraging Messages:** We tell the children what they CAN do as an alternative to what they are not allowed to do. We also, take note when their behavior is exceptionally pleasing or helpful. We try to avoid empty praise but specific encouragement is excellent.

**Model Problem Solving Skills and Corrective Behavior:** Children in early childhood operate out of the mode of imitation. Modeling for them how to navigate through situations that they have not yet developed the "know how" for is far more effective than talking to them about what to do.

**Natural and Logical Consequences:** We avoid non-related consequences, i.e. taking away a toy for hitting. Instead we choose consequences that correlate to the child's misdeed, i.e. for hitting the child may become 'the doctor' to heal the injured, to fix what has been broken or rest when the ears must be too tired to work right.

**Clear, Immediate, Calm Action:** We believe that there is no “wrong” behavior... just behavior that is out of its right time, place, and intensity. It is our goal to guide the children through direct modeling and engaging the imagination toward a better understanding of positive and harmonious behavior. For example, there is absolutely nothing wrong with wanting to speak with a friend; in fact, friendship is something to be cherished! However, speaking to a friend in the middle of a story or ring time may not be the best time or place to do so. Part of our task as educators is to help children appreciate when to engage and when to refrain and how to bring the correct level of intensity to each situation. All of the redirection, guidance and correction in the classroom are built around this idea.

1. When a situation occurs which requires disciplinary action, the first step is to right the wrong. If someone is hurt, the child responsible for the hurt is asked to give aid, such as bringing an ice pack or laying on a “healing hand”. The teacher reminds the child that “hands are for good work and play,” or “we use kind and gentle words.” If the child easily forgets classroom rules, he or she will work in close contact with a teacher or assistant.
2. If the incident is one to cause deeper concern, or if a student continues to be disruptive and/ or exhibits discourteous behavior, (taking age appropriate behavior into consideration) the teacher contacts the parents to discuss the situation. At this time the teacher may ask parents to be prepared to remove the child from school before dismissal time if the problem behavior occurs again. This action makes it clear to the child and all students in the class that such behavior is not tolerated.
3. In certain cases as deemed necessary by the teacher, a meeting is arranged with parents, teacher and, if necessary, an additional member of the faculty or staff. Parents and teachers work together as a team to prepare a written course of action. This plan outlines steps to be taken at home and at school to address the child’s behavior and to help him or her to move in a more positive direction.
4. If the undesirable behavior persists parents may be asked to keep the child at home until a meeting with a Care Group, made up of several Faculty members, can be arranged. The Care Group may ask parents to seek professional help for their child such as counseling, medical help or assessment by an expert in child development. A written agreement outlining the required course of action will need to be signed by the parents before the child returns to the classroom.
5. If the problem persists and professional help is not utilized or not utilized sufficiently enough to address the student’s problems, the parents may be required to withdraw their child from the school.

## **Grades Class Expectations**

1. No Crosstalk Allowed! This means everyone is expected to pay reverent attention to whoever is speaking. No interruptions.
2. No wandering around the classroom. Everyone stays seated unless they have communicated with the teacher first. We use sign language to communicate our needs.
3. We raise our hand before speaking aloud.
4. We use respectful and courteous speech. The children are welcome to have their own opinions, feelings, and express themselves freely. However, they must find a way to communicate that does not disrespect others. This includes a respectful tone of voice.



5. We use our words first – always! The children are expected to problem solve issues on their own – or at least try to do so before grabbing a teacher.
6. Absolutely no hitting, kicking, scratching or biting at any time! We have a zero tolerance policy regarding violence in the Grades Program. The students are old enough to regulate and redirect their behavior. The student will receive an immediate consequence and lose their recess privileges for the day. In extreme cases or repeated incidents, parents will be notified. In extreme circumstances (deliberate or repeated acts of aggression/anger) the student will be sent home immediately from school.
7. Everyone helps at lunch time cleanup, chore time, and recess clean up! No one is exempt from their daily obligations. We maintain our classroom daily. Please see chore wheel for specific chores.
8. The game or play stops when someone is hurt. All play stops until the injured party is safely away from the rest of the play.
9. The children may have water bottles at their cubbies..

Problem solving protocol and Fair Trade: Our protocol for empowering children to problem solve on their own follows: Always ask the student bringing the concern “Did you talk to your friend first before coming to me?” If their answer is “no,” send them back to speak directly with their peers. If the answer is “yes” – go check with the other party and ask if they were consulted.

If at this point, they are unable to resolve the issue, an adult will step in and assist.

The philosophy behind this method:

It teaches children to evaluate the seriousness of an incident: is it something that they can resolve with their friends or is it a big enough issue to bring in an adult? It teaches direct communication and begins to build strong inter-personal skills. It discourages gossip and mean spirited speech. It eliminates the endless tattling that often occurs around 7/8 year olds.

If they play during work time, then they work during play time! Our classrooms operate under the **Fair Trade system**. The students understand that their behavior can either contribute to or detract from the learning environment. If they behave in such a way that they are detracting from the classroom experience, they will have to do something that contributes to SMS during their free time. (Chores, work, something helpful – there’s always so much to do!)

## **Shared Discipline**

When a parent is on site with their child, they are responsible for their child’s safety. All animal pastures, corrals and coops are off limits after school dismissal each day, unless accompanied by a SMS staff member. After school hours, please admire and cajole our animals from outside their fences.

## **Prohibited items/activities**

The following are not permitted in school or on school grounds:

- Pocketknives (unless approved by a teacher for a specific project) and other potentially dangerous items.



- Riding bikes or scooters during school hours unless sanctioned and supervised by a teacher.
- Chewing gum.
- Using music players, electronic games, etc.
- Playing ball, riding bikes and scooters, or roller-blades inside the school building.
- Excessive wrestling or roughhousing.
- Throwing rocks and other hard objects. Snowball throws are permitted with teacher permission and supervision.
- Using sticks for sword fights unless supervised by a teacher.
- Sleds with metals runners and sliding or sledding head first.
- Hard balls.
- Using swings, ropes and other playground equipment in a manner that puts anyone at risk.

## ***Policies***

### ***1. Denial of Attendance to a Student:***

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

No pupil shall be expelled nor denied enrollment without the Board of Directors having first given written notice to the parent or guardian of the pupil, which notice shall state the grounds for the proposed expulsion or denial of enrollment and the time and place where such parent or guardian may appear to contest the action of the Board to deny school attendance, and which notice shall also state the rights of the pupil to be represented by counsel, to produce witnesses and submit evidence on his own behalf, and to cross-examine any adult witnesses who may appear against him. Within a reasonable period of time following such notification, the Board of Directors shall grant the pupil and his parents or guardian a full and fair hearing on the proposed expulsion or denial of enrollment. However, the Board shall allow a reasonable period of time between such notification and the holding of such hearing to allow the pupil and his parents or guardian to prepare their response to the charge. Discipline of students with disabilities shall be in accordance with the requirements of federal law Part B of the Individuals with Disabilities Education Act and Section 504 of the Rehabilitation Act. Any pupil who is within the age of compulsory attendance, who is expelled or denied enrollment as herein provided, shall come under the purview of the juvenile corrections act, and an authorized representative of the Board shall, within five (5) days, give written notice of the pupil's expulsion to the prosecuting attorney of the county of the pupil's residence.

### ***2. Procedure by which Students can be Suspended, Expelled and Reenrolled:***

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

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

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

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

### **3. Re-admission after conference with Student/Parent/Administrator.**

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

Step 5: Reenrollment will occur after meeting with school’s Board of

Directors/Administrator prior to end of expulsion, and reviewing students’ attitude and behavior history, activities during expulsion, recommendations by counselor, teacher, and student advocate.

### **4. Drug and Alcohol Use Policy**

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

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

- Parent or guardian contacted

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

## **Student Referral**

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

## **Staff Training**

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

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

## **Disciplinary Procedure**

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

- The student shall be suspended and the Board of Directors will be petitioned for expulsion of the student;
  - Law enforcement agency shall be contacted; and,
  - Child Protection Services (C.P.S.) will be contacted.
4. First Offense for Selling or Delivering (K-8)
- Parent or guardian will be contacted;
  - Law enforcement agency shall be contacted;
  - The student will be suspended and the Board of Directors will be petitioned for expulsion of the student; and,
  - Child Protective Services (C.P.S.) may be contacted.

## **5. Weapons, Fireworks, and Dangerous Instruments:**

Possession, handling, or transporting a firearm, dirk knife, bowie knife, dagger, metal knuckles, or any deadly and dangerous weapons as defined in Section 921 of Title 18 of the United States Code, including any knife, any explosive, including firecrackers, or any other dangerous object [Dangerous object is defined as any object used in a dangerous and/or inappropriate manner that may cause harm to a person or property], on or about his/her possession while on the property of the WRWMS, while engaged in a school activity on other property, and/or while riding school-provided transportation.

Causing or attempting to cause physical injury with a weapon or dangerous implement as defined in the aforementioned paragraph, or behaving in a way that could cause physical injury to any person is in violation of this policy.

Violation of the weapons policy will result in immediate suspension and expulsion for a minimum of one year or as determined by the Board on a case by-case basis. The suspension and expulsion includes no participation in or watching of any school activity on school property. The suspended or expelled student may not be present on school property at any time. This may be modified only by the Board.

## **6. Suicide prevention IDAPA 08.02.03.160 (Policy included in **Appendix Q.**)**

### **Employees**

**Benefits:** *Idaho Code 33-5205(3)(m)*

Syringa Mountain School will comply with all state and federal laws addressing employment benefits and insurance. At a minimum, employees will be covered by unemployment and worker's compensation insurance, will have federal social security withheld along with the employer's matching contributions, will be covered under the Public Employee Retirement System of Idaho (PERSI), and will be offered health insurance. It is the intent of Syringa Mountain School to offer competitive wages and benefits so that it can recruit and retain talented employees to shape children who will become the leaders of our future

All employees who currently are members of PERSI will continue their participation. All new employees will become members of PERSI. Employees will contribute at the rate established by

PERSI. All employees will contribute to the Social Security System. SMS will make all employer contributions as required by PERSI and Federal Social Security. SMS will also pay for worker's compensation insurance, unemployment insurance, and any other payroll obligations of an employer as required by Idaho Code § 33-1279. SMS will also allow for accumulation of sick leave as allowed by Idaho Code § 33-1217. The Board will provide health insurance and may establish other benefits. The Board will develop a process to ensure that all employees are enrolled in or covered by health insurance, either through the school provided plan or some alternate plan.

## Status

### **Transfer Rights** *Idaho Code §§ 33-5205(3)(o)*

SMS is its own Local Education Agency (LEA). No employee transfer rights apply between SMS and any other school district.

### **Professional Opportunities**

All employees will undergo an annual performance review which will in part determine individual and staff professional development needs. SMS teachers are required to be Idaho certified as well as pursuing ongoing Waldorf certification. SMS will provide extensive professional opportunities annually to its teaching staff to include:

- ☐ Pre-service training provided in Waldorf education prior to the start of school.
- ☐ Mentoring provided during the school year.
- ☐ Hiring teachers who are multiply endorsed and who will loop with their students over multiple years.
- ☐ Common planning times and time before or after school provided to collaborate and coordinate their instruction.
- ☐ Peer observation opportunities provided.

Annual summer professional development occurs with teachers attending either the Michael Institute or Rudolf Steiner College for annual two week intensives in the upcoming grade level they will be preparing to teach. Additionally, specials teachers will attend courses specific to their discipline through the Steiner College.

We have selected the **Michael Institute**, in Portland, Oregon, to deliver our needed **Waldorf certification training**. This is four year training program that occurs onsite during the summers and through online assignments throughout the school year. The director of the Michael Institute, John Miles, will also be contracted to provide onsite mentoring. The convenience of the program location being offered to us just one state over combined with the program's rigor has convinced us that this is a meaningful way to equip our team of teachers to be ready to take on the challenge of opening a cutting edge public Waldorf charter school.

We have selected the **Rudolf Steiner College**, in Sacramento, California, to deliver our **specialized Waldorf certification training**. Rudolf Steiner College is one of America's leading Waldorf teacher education colleges established in 1976. Their programs are designed to meet the professional development needs of our specialty teachers with 2-3 week summer intensives in Spanish Teaching, Remedial Reading, At Risk Students, Arts/Handwork Instruction, and Waldorf Education for Public School Teachers.

Professional development will occur throughout the school year through child study, staff meetings, parent education evenings, special guest speakers and individual teacher mentoring.

### **Resources for Professional Development**

In addition to the scheduled professional development outlined in **Appendix M**, a substantial amount of professional development resources is available online, either for free or at a discounted cost. A professional library will be maintained on site and electronically.

### **Evaluation of the Administration**

The evaluation of the administration will take place annually before the end of June. See **Appendix M** for specific administrator evaluation tools.

### **Evaluation of Teachers and Staff**

Teacher and staff performance will be evaluated in accordance with Idaho state law and the State Department of Education policies. SMS will develop an evaluation process based the Danielson model for teacher evaluation or whatever model the state may mandate in the future. All teacher evaluations will be conducted at least once a year by a certified administrator according to the SDE timeline. See teacher evaluation tools in **Appendix M**.

### **Contracts** *Idaho Code § 33-5206(4)*

All certificated staff will be required to sign a written contract with SMS. Contracts will be in a form approved by the Idaho State Superintendent of Public Instruction. The contract is conditional upon valid certification. A copy of all teacher contracts and certificates for all certified teachers or staff members will be on file in the school office. Job announcements and all other hiring and employment practices will be free of any unlawful discriminatory language or practices.

### **Background Checks** *Idaho Code §§ 33-130 33-512 and 33-5210(4)(d)*

All employees, subcontractors, board members, and volunteers who work with students independently will undergo state of Idaho criminal background checks and FBI fingerprinting checks. One fingerprint card will be submitted to the Office of Certification at the State Department of Education. Subcontractors will pay for their own background checks. SMS will pay for background checks for all employees, volunteers and board members.

## TAB 7

### ADMISSION PROCEDURES, ENROLLMENT OPPORTUNITIES, STUDENT HANDBOOK

#### Enrollment capacity of the school:

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

<b>Year:</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>
K (half-day)	20	20	20	20	20	20	20	20	20
K (full-day)	20	20	20	20	20	20	20	20	20
1st Grade	30	30	30	30	30	30	30	30	30
1st Grade		30	30	30	30	30	30	30	30
2nd Grade	30	30	30	30	30	30	30	30	30
2nd Grade			30	30	30	30	30	30	30
3rd Grade	30	30	30	30	30	30	30	30	30
3rd Grade				30	30	30	30	30	30
4th Grade	30	30	30	30	30	30	30	30	30
4th Grade					30	30	30	30	30
5th Grade	30	30	30	30	30	30	30	30	30
5th Grade						30	30	30	30
6th Grade		30	30	30	30	30	30	30	30
6th Grade							30	30	30
7th Grade			30	30	30	30	30	30	30
7th Grade								30	30
8th Grade				30	30	30	30	30	30
8 <sup>th</sup> Grade									30
<b>Total</b>	<b>190</b>	<b>250</b>	<b>310</b>	<b>370</b>	<b>400</b>	<b>430</b>	<b>460</b>	<b>490</b>	<b>520</b>

These numbers are the maximum number of students in each grade. It is our intent to allow the school to grow using a controlled growth plan on a 9 +0-year schedule. We will add one grade level beyond the fifth grade each year up to a top grade level of eighth grade. Additionally, for each year, we will add a second class of a lower grade to promote and allow for growth at the upper levels. Should enrollment approach the minimum for financial viability, the Board of Directors shall take action including, but not limited to, the following:

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

Waldorf schools are particularly effective with larger class sizes due to practices such as teacher looping, experiential learning, arts integration, daily garden and animal husbandry skills, in other words equal attention to cultivating the child's heart, head and hands.



## **Process for Public Notification of Enrollment Opportunities**

The following actions will be made to notify the public of enrollment opportunities at SMS. While taking into consideration the language demographics of the attendance area, at least three (3) months in advance of the enrollment deadline established by Syringa Mountain School each year, information will be posted in highly visible and prominent locations within the area of attendance. In addition, SMS shall ensure that such process includes the dissemination of press releases and/or public service announcements to media outlets that broadcast within or disseminate printed publications within the attendance area for SMS. SMS will ensure that such announcements are broadcast or published by such media outlets on not less than three (3) occasions, beginning not later than fourteen (14) days prior to the enrollment deadline each year. Finally, such enrollment information shall advise that all prospective students will be given the opportunity to enroll in the public charter school, regardless of race, color, national or ethnic origin, religion, gender, social or economic status, or special needs.

Public notification may include, but is not limited to, SMS school communication vehicles, Mountain Express online, The Sun and the BCSD Web page updates; advertising in local newspapers Mountain Express and The Sun; postings at community centers such as the YMCA, Blaine County Recreation District, Hailey Public Library, the Community Library, public information meetings/open houses to be held prior to the start of the school year and during the school year. At each event, a record of the attendants and email addresses will be collected to follow up electronically with all interested parties and notify them of future enrollment opportunities.

## **Requests for Admission**

Syringa Mountain School will comply with Section 33-5205 (3)(j) Idaho Code. A parent, guardian, or other person with legal authority to make decisions regarding school attendance on behalf of a child in this state may make a request in writing for such child to attend SMS. In the case of a family with more than one (1) child seeking to attend SMS, one written request for admission must be submitted on behalf of all siblings. The written request for admission must be submitted to, and received by, SMS on or before the enrollment deadline established by SMS. The written request for admission shall contain the name, grade level, address, and telephone number of each prospective student. If the initial capacity of SMS is insufficient to enroll all prospective students, a lottery shall be utilized to determine which prospective students will be admitted to SMS. Only those written requests for admission submitted on behalf of prospective students that are received prior to the enrollment deadline established by SMS shall be permitted in the lottery. Written requests for admission received after the established enrollment deadline will be added to the bottom of the final selection list for the appropriate grade.

## **Enrollment Deadline**

Each year Syringa Mountain School shall establish an enrollment admissions deadline, which shall be the date by which all written requests for admission to attend SMS for the next school year must be received. The enrollment deadline cannot be changed once the enrollment information is disseminated. Applications will be accepted after the enrollment deadline either to fill open spots or to be added to the waiting list.

## **Admission Preferences for Initial Enrollment**

If the initial capacity of Syringa Mountain School is insufficient to enroll all prospective students, a lottery shall be utilized to determine which prospective students will be admitted to SMS. SMS will follow Idaho Code Section 33-502 (j).

Prospective students will be placed in priority groups as follows:

*First Priority:* The children of founders and full-time employees provided that this admission preference shall be limited to not more than 10% of the total enrollment. Once the number of founders' applicants reaches the 10% limit, the remaining children of founders will not be included in this category. Once this category is filled, the remaining students will be categorized according to the highest level of preference for which they are otherwise eligible.

*Second Priority:* Siblings of pupils already enrolled in SMS.

*Third Priority:* Prospective students residing in the primary attendance area of SMS.

*Fourth Priority:* Prospective students residing outside the primary attendance area of SMS.

For subsequent enrollment periods, prospective students will be placed in the following priority groups as needed for the lottery:

*First Priority:* Pupils returning to SMS in the second or any subsequent year of operation

*Second Priority:* The children of founders and full-time employees, provided that this admission preference shall be limited to not more than 10% of the total enrollment.

*Third Priority:* Siblings of pupils already enrolled in SMS.

*Fourth Priority:* Prospective students residing in the primary attendance area of SMS.

*Fifth Priority:* Prospective students residing outside the primary attendance area of SMS.

**Founders and Admission Preference** Taken from the Bylaws, Article 3, Section 3.2 Founders and Admission Preference: A "Founder" is hereby defined as a person, including employees, parents, or staff of a public charter school, who has served for at least 9 months on the founders board or committees and has worked at least 100 hours on outside projects. The time on the founders board or committees and the hours on outside projects must be performed by the date of the first lottery. The Board of Directors of SMS will vote prior to the first lottery to identify qualified founders based on the criteria above.

**Sibling definition** A sibling is defined as a brother or sister living in the same primary household who has one or both parents in common, a half or step sibling, a foster child or a child under legal guardianship of the same parent(s).

**Proposed Attendance List for Lottery** *Idaho Code § 33-5205(3)(j)*

Syringa Mountain School will comply with Idaho State Board of Education Rules Governing Public Charter Schools IDAPA 08.02.04 for the Proposed Attendance List for Lottery. Each year SMS will create a new attendance list containing the names of all prospective students on whose behalf a written request for admission was received in a timely manner by the public charter school, separated by grade level. Returning students will be automatically included in the attendance list unless the parents or guardians have requested otherwise. The proposed attendance list shall contain columns next to the name of each student, in which the public charter school will designate admission preferences applicable to each prospective student. The columns shall be designated “A” for returning student preference; “B” for founders and full-time employees preference; “C” for sibling preference, with a corresponding cross-reference to each of the siblings of the prospective student; and “D” for primary attendance area preference. Names shall not be carried over from one year to the next.

### **Equitable Selection Process**

SMS will comply with Idaho State Board of Education Rules Governing Public Charter Schools IDAPA 08.02.04 for the Equitable Selection Process. SMS will hold a lottery on or before April 30 of each year. The lottery will be held in a public forum and a disinterested party will conduct the lottery selection. If the initial capacity of SMS is insufficient to enroll all prospective students, or if capacity is insufficient to enroll all prospective students in subsequent school years, then SMS will determine the students who will be offered admission by conducting a fair and equitable lottery.

### **Final Selection List** IDAPA Rule 08.02.04.203.09.

SMS will comply with Idaho State Board of Education Rules Governing Public Charter Schools IDAPA 08.02.04 for the Final Selection List. The names of the persons in highest order on the final selection list shall have the highest priority for admission to SMS in that grade, and shall be offered admission to SMS in such grade until all seats for that grade are filled. All student names that were not selected in the lottery will be listed after the selected students in the order established by the lottery. All openings during the school year will be filled according to the order of this list. Written requests for admission received after the established enrollment deadline will be added to the bottom of the waiting list for the appropriate grade. If there is an opening in one grade, a sibling, if any, from a late submitted application will go to the bottom of the sibling list. Waiting lists for a given school year shall not roll over to a subsequent school year.

### **Notification and Acceptance Process**

SMS will comply with Idaho State Board of Education Rules Governing Public Charter Schools IDAPA 08.02.04 for the Notification and Acceptance Process. With respect to students selected for admission to the public charter school, within seven (7) days after conducting the selection process, SMS shall send an offer letter to the parent, guardian, or other person who submitted a request for admission on behalf of a student, advising such person that the student has been selected for admission to the public charter school. The offer will be followed by enrollment information to be completed by such student’s parent or guardian and returned to SMS by the date designated in the materials. Notifications will be by phone call, email, or letter.

With respect to a student not selected for admission in the lottery process, SMS shall notify the parent, guardian, or other person who submitted a request for admission within seven days. The notification will explain that the prospective student is not eligible for admission but will be placed on a waiting list and may be eligible for admission at a later date if a seat becomes available. If a parent, guardian, or other person receives an offer letter on behalf of a student and declines admission, or fails to sign and return such offer in a timely manner by the date designated in such offer letter by the public charter school, then the name of such student will be stricken from the final selection list, and the seat that opens in that grade will be made available to the next eligible student on the final selection list. If a student withdraws from SMS during the school year for any reason, then the seat that opens in that grade will be made available to the next eligible student on the final selection list.

### **Subsequent School Years**

SMS will comply with Idaho State Board of Education Rules Governing Public Charter Schools IDAPA 08.02.04 for Subsequent School Years. The final selection list for a given school year shall not roll over to the next subsequent school year. If the capacity of the public charter school is insufficient to enroll all prospective students during the next subsequent school year, then a new equitable selection process shall be conducted by the public charter school for such school year.

### **Waiting List**

A waiting list will be maintained and reviewed throughout the year. Students will be listed by grade and by preference categories. Any student who enrolls after the lottery will be added to the bottom of the waiting list. The waiting list will not carry over from one year to the next.

### **Public School Attendance Alternative *Idaho Code § 33-5205(3) (n)***

Since a charter school is a public school and SMS is a new entity, not a conversion of an existing school, the attendance alternative would be the same as for all students in a public school district. The children located within the attendance area of the authorizing district will have the choice to enroll or seek admission to other educational entities, be they public, private or other. Enrollment is not mandated based upon residential proximity to SMS, but through parental choice and equitable selection.

### **Student Handbook and Procedure Ensuring Parental Access to Student Handbook**

SMS's handbook will be finalized upon opening of the school and will be a joint effort between the administration, staff, parents and Board. The term student handbook is synonymous with parent handbook. The handbook will be distributed to all parents electronically and as a hard copy the first day of school. As part of our registration procedures, parents will receive their handbook and be requested to sign a validation form indicating that they have read and will comply with the handbook. The handbook will also be available for quick reference via the school website. See **Appendix P** for Draft Student Handbook.

## **TAB 8** *BUSINESS PLAN, DESCRIPTION, MARKETING, MANAGEMENT, FINANCES, TRANSPORTATION, and NUTRITION.*

### **Business Plan**

Syringa Mountain School-is organized exclusively for charitable, educational and scientific purposes. The Articles of Incorporation for Wood River Waldorf Methods School, a Public Charter School, Inc. as filed and approved by the Secretary of State for the State of Idaho on August 30, 2012 and Doing Business As (DBA) Syringa Mountain School documentation can both be found in **Appendix A**.

SMS will initially serve kindergarten through fifth grade with plans to extend to eight grades. SMS will be located within the Blaine County School District, Idaho, and plans to open in August 2014. The Corporation is organized exclusively for educational purposes within the meaning Section 501(c)(3) of the Internal Revenue Code of 1986, or the corresponding provisions of any future federal income tax code. SMS will operate as a public charter school and is subject to all the rules and regulations of traditional public schools. Charter Schools face the challenges of tight budgets resulting in part from not having access to the local taxes that traditional public schools enjoy. The non-profit status is important in accessing contributions from entities that are willing to donate to the programs of charter schools.

### **Marketing Plan:**

The purpose of the SMS Marketing Plan is to develop a consistent message and implementation process linked to our vision, mission, and values; engage parents, board, staff, students, community; communicate strategically and use communication tools effectively. A PR/Marketing Committee will be formed with interested and if possible experienced parents, teachers, students, and Administrator.

The goals and major responsibilities of the Marketing Committee include:

1. Communicating accurately, creatively and thoroughly the SMS mission using a variety of communication vehicles.
  - a. Annually a variety of media outlets will be used to notify the community about all school events, significant news worthy articles, student achievement and performance, as well as logistics such as the enrollment/re-enrollment and lottery process for SMS. Media coverage will be balanced between reaching the identified audience, utilizing as many free, or low cost options as possible, and ensuring universal access. Media examples include:
    - 1) Community calendars on television, radio, internet, websites and including Spanish stations
    - 2) Ads/articles in back to school edition of Mountain Express newspaper
    - 3) Open houses held three times during the year, and one held one month prior to the start of school.
    - 4) Flyers attached to products sold by local merchants.
    - 5) Information tables at local events/festivals: May Faire, Annual Christmas Bazaar.
    - 6) School website, as well as blogs, Facebook, and Twitter pages

- 7) Public speaking: Chamber of Commerce, Rotary, Community Radio show, KECH news
  - 8) Ongoing articles in the Mountain Express and Twin Falls papers
  9. Development and publication of news releases and articles for all school events and festivities
2. Monitoring community response to inform decision making:
  - a. All parents, students, and staff will be surveyed annually to measure satisfaction and to answer questions concerning whether we are fulfilling our mission and vision as outlined in the Charter.
  - b. Collect data from public information events and speakers.
  - c. Monitor public comment on Facebook
3. Leverage educational offerings through partnerships:
  - a. Development of marketing strategies to attract partnerships that will enhance the educational offerings of SMS. See **Appendix E** for initial partnership collaborations.
4. Ensuring all students and families are reached with PR/Marketing Plan.
  - a. Include strategies to reach at-risk and non-English speaking students as well as underserved students (Idaho Code § 33-5205).
    - 1) Ongoing articles in the Spanish only section of the Mountain Express
    - 2) Public service announcements on Spanish speaking radio program
    - 3) Spanish language enrollment information posted on SMS's website
    - 4) Posting advertising materials in English and Spanish in writing, electronically and in prominent locations (i.e. the libraries, churches, hospital, clinics, YMCS, BCRD)
    - 5) Providing materials in Spanish at all public events, whenever English materials will be distributed.
    - 6) Advertising materials will state SMS's non-discrimination policy
    - 7) Partnering with the BCSD to utilize SMS site, services and staff to meet the needs of BCSD at-risk and underserved students I.E. Autism-spectrum program students receive therapeutic services at SMS (in progress); I Have a Dream Foundation students attend SMS after school enrichment (in process).
    - 8) Distributing information and presenting information at faculty meetings, administrative meetings and Parent Association Meetings for the BCSD schools.
5. Enrollment processes are in accordance with Idaho Code
  - a. According to Idaho Code § 33-5205(3)(s), all advertising and promotion processes for SMS will include the dissemination of enrollment information, in both English and other languages as required by the demographics of the area, at least three (3) months in advance of the enrollment deadline established by the public charter school each year, to be posted in highly visible and prominent locations within the area of attendance of the public charter school such as the YMCA, libraries, school facility. In addition, SMS will ensure that such process includes the dissemination of press release and/or public service announcements to media outlets that broadcast within and/or disseminate printed publications within the area of attendance of the public charter school. SMS will ensure that such announcements are broadcast and/or published by such media outlets on not



less than three (3) occasions, beginning not later than fourteen (14) days prior to the enrollment deadline each year i.e. online and hard copy ads in both the Mountain Express and The Sun, radio stations KSKI, KECH FM, school website, BCSD website. Enrollment information will advise that all prospective students will be given the opportunity to enroll in the public charter school, regardless of race, color, national or ethnic origin, religion, gender, social or economic status, or special needs.

During the first three months following authorization, the Marketing Committee will accomplish the following tasks:

Month	Task	Responsible Party	Cost	Completed
September	Identify spokespeople	Committee Chair-Laurie Wertich and Board Chair Dr. Mary Gervase	0	September
	Recruit additional Marketing Committee members: Laurie Wertich, Becquel Smith, Tener Rogers, Svea Grover, Noli Burge, Rebecca Dahl	Committee Chair and SMS Board	0	Ongoing
	Press releases announcing authorization distributed to all media sources	Committee Chair-Laurie Wertich	0	September
	Logo design finalized	Phoebe Pilaro, Svea Grover, Britt Johnston	Donated	September
	Website designed and opened	Mary Gervase	0	September
	Email account opened	Mary Gervase	0	September
	Begin email data base			Ongoing
	Facebook, Twitter, Jumpstart opened.	Laurie Wertich	0	September
	Calendar for social media updates developed	Committee	0	September
	Calendar and determine articles for the media campaign "The birth of a charter school" campaign	Committee	0	September
	Finalizing message and developing scripts, Q and A's, boiler plate to be used on all press releases, etc.	Committee	0	September
	Schedule rotary presentations	Committee-Sept. 10 <sup>th</sup> - Hailey Rotary-Greg and Mary present	0	September
	Develop and update marketing timeline and tasks	Committee	0	Ongoing
October	Media kit for use by fundraising committee for prospective donors	Committee	\$100 printing	October
	Media kit for use by parents and staff	Committee	\$100 printing	October
	Develop, translate and post enrollment form on website	Laurie and Mary	Donated	October
	Schedule first public meeting	Svea Grover	0	October
	Press release about site update	Laurie Wertich	0	October
	Develop and send first newsletter	Committee	\$100 Constant contact	October
	Continue media campaign "The birth	Committee	0	October



	of a charter school” campaign			
	Develop film script and film	Laurie Wertich, Matt Gershater	Donated	November
	Develop newsletter topics and schedule	Committee	0	October
	Ads designed and placed for enrollment announcements	Committee	\$500	October
	Media blitz for open enrollment start and end dates	Committee	0	October
November	Continue development of materials for committees I.E. fundraising and site committee	Committee	\$100	November
	Revisit and update marketing timeline and tasks.	Committee	0	Ongoing
	Continue to place ads for enrollment announcements	Committee	\$500	November
	Public meeting held, data collected.	Committee	\$50 handouts	November
	Schedule next public meetings for December and February	Committee	0	November
	Continue media campaign “The birth of a charter school” campaign	Committee	0	November
	Newsletter sent	Laurie and Mary		November
	Arrange public event with speaker, release of SMS film, etc.	Committee		November

**Appendix L** contains detailed marketing activities as part of the Pre-Opening Plan. The marketing budget will rely primarily on low cost or no cost communication vehicles and strategies. The budgets (see **Appendix G and H**) contain a line item for Marketing and Advertising of \$2000 for each of the first three years.

A sample PR/Marketing calendar is included in **Appendix T**.

### **Management -**

An overview of the roles and responsibilities of SMS personnel, board, and administration are provided in Tab 5 under Governance. An overview of roles and responsibilities is also included in Tab 2 Operations.

### **General management parameters**

**Board of Directors:** (Please see **Appendix D** for resumes). The Board of Directors are responsible for seeing that the academic program of SMS is successful, that the school’s program and operation are faithful to the terms of its charter, and that the school is a viable organization. As outlined in Board source, the Board of Directors has responsibility for 1. Determine the organizational mission and keeping it clearly in focus; 2. Select the school leader, 3. Support and review the performance of the school leader, 4. Ensure effective organizational planning, 5. Ensure adequate resources, 6. Manage resources effectively, 7. Determine, monitor and strengthen programs and services, 8. Enhance SMS public standing, 9. Ensure legal and ethical integrity and maintain accountability; 10. Recruit, orient new board members and assess board performance.

**Administrator(s):**

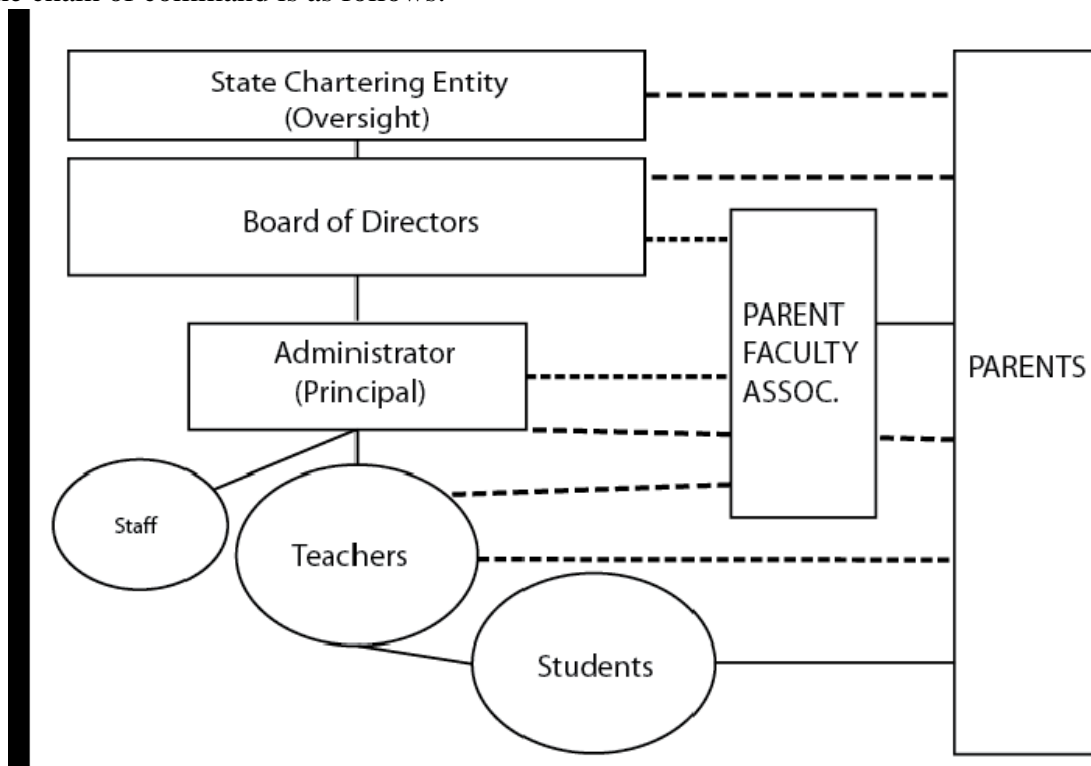
The Administrator is responsible for all financial reporting, legal documents and records of the organization. They will be responsible for building, property and maintenance of all goods and services. They will, along with the Governance Board, be responsible for all outreach, fundraising, events coordination and student recruitment. It is their responsibility to make sure the school adheres to all governing policies and that the school is in alignment with the Waldorf philosophy, principles and pedagogy. The Administrator attends the meetings of the Board of Directors.

**Contractual services:**

Financial services will be contracted out to licensed and bonded entities. For at least the first year of operation, Sage International School has agreed to provide discounted financial services and oversight. \$12,000 has been allocated for this purpose. As contractual services are considered, additional Funding sources will be utilized to include state allocations per pupil, federal start-up grants, private grants, business partnerships and donations.

***Organizational Flow Chart***

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



The organizational chart was taken from American Heritage Charter School.

**Decision making matrix:**

# SYRINGA MOUNTAIN SCHOOL

## Roles and Responsibilities 2013-2014

### Matrix

WHO IS INVOLVED IN THE  
DECISION MAKING DISCUSSION

*\*involved only if needed*

Administrator	Board of Directors	Cert. Staff (Teachers)	Class Staff (Aides/Admin)	Legal Requirement	Parents/Pa	Students	Staff Council
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#### INPUT GIVEN BY

#### DECISIONS ARE MADE BY

#### CLASS/STUDENT AFFAIRS

Curriculum	X		X		X	X	X	X	Staff Council, Administrator, Board
Calendars/Schedule	X	X	X		X	X		X	Board of Directors & Administrator
Class Culture/Routine			X			X	X	X	Staff Council & Administrator
Enrollment					X				Board of Directors
Class Size	X	X	X		X	X		X	Board of Directors
Class Lists/Placements	X		X			X		X	Administrator & Staff Council
Student Discipline	X		X		X	X	X	X	Administrator & Staff Council
Special Education	X	X	X	X	X	X	X	X	Parent & Teacher Council, Dir, & Board
School Events	X	X	X	X	X	X	X	X	Teacher and Parent Council

#### MONEY/FUNDING

Allotting Funds									
School Budget	X	X	X		X	X*		X	Board of Directors
PTO Funds						X		X	Parent Council
Business									
Accounting	X	X		X	X				Administrator, Board, Contractual
Purchasing	X	X	X	X	X	X	X	X	Administrator, Board, Contractual
Fundraising	X	X	X	X	X	X	X	X	Administrator and Parent Council
Facilities Management	X				X				Administrator, Site Maintenance

#### STAFF / BOARD ISSUES

Employment									
Selection	X		X		X	X	X	X	Administrator and Board
Evaluation	X	X	X		X	X		X	Administrator and Board
Dismissal / Layoff	X	X			X				Administrator and Board
Professional Development	X		X					X	Administrator and Teachers' Council
Conflict Resolution Process	X	X	X	X	X	X	X	X	Administrator and Board

#### LEGAL ISSUES

Legal Procedures/Compliance	X	X			X				Administrator and Board
Health & Safety	X	X	X	X	X	X	X	X	Administrator, Teacher Council, & Board

#### PLANNING/FUTURE

Strategic Planning	X	X	X	X	X	X	X	X	All & Board
Volunteer Projects	X	X	X	X	X	X	X	X	All & Board
Scope of Committees	X	X	X	X	X	X	X	X	Parents, Administrator, Board
Outreach & Marketing	X	X	X	X	X	X	X	X	Administrator, Board. Board Committee

## **Matrix Narrative**

### **Class/Student Affairs**

1. Curriculum: The Teacher Council (includes the Administrator) recommends standards aligned curriculum that meets criteria for supporting project-based instruction and student needs. Board approval is required on all curriculums. Questions or concerns about curriculum used at the School should be directed to the teacher and/or the Director of Education.

2. Calendars/Schedule: The annual school calendar is drafted by the Teacher Council based on the local district calendar; Board approval is required. School events are scheduled by the Teachers' Council with input from the Parent Council and committee chairs.

3. Class Culture/Routine: The teacher is responsible for everything that happens in the classroom and sets classroom norms and routines with input from his/her students. Parents play an integral role in the classroom as volunteers and partners in their child's learning. They help facilitate the teacher-led curriculum and provide their own experience and skills where appropriate.

4. Enrollment: Enrollment in the school is dictated by legal and board policies.

5. Class Size: Class sizes are determined by the Board with input from the Administrator and are driven largely by budget and programmatic concerns. Parents input may be solicited through surveys and Parent Council Meetings.

6. Class Lists/Placements: Class lists are the sole responsibility of the Teacher Council. Since there are many factors and considerations affecting student placements that parents may not be aware of, the staff's decision regarding class placement should be respected. If for any reason, a parent has an extenuating issue with his/her child's placement, it should be addressed to the Administrator.

7. Student Discipline: The Teacher Council is responsible for establishing behavior norms; the entire staff is responsible for ensuring that all students are provided with a safe learning environment where all are respected. Parents' role is to support them by reinforcing the expectations with their own child(ren). Parents are not permitted to discipline students. Student referrals, suspensions and expulsions are the sole responsibility of the teachers and the Administrator. The Board must approve all student expulsions.

8. Special Education: Special Education is the responsibility of the Teacher Council and the Administrator, when needed; it is strictly regulated and governed by legal requirements. The Board is responsible for ensuring compliance with all special education laws. Parents have input regarding the needs of their own child with respect to special education.

9. School Events: The Teacher Council is responsible for scheduling and planning all school events with input from the Parent Council and committee chairs/members.

### **Money/Fundraising**

10. General Fund School Budget: The annual school budget is determined by the Board with input from the Administrator and the Teacher Council. Budgetary procedures are regulated by

legal policies. The Parent Council may make budgetary requests for items that fall outside the parameters of their budget.

11. Parent Council Budget: Funds raised from parent contributions, and school fundraisers are allocated by the Parent Council with input from the Teacher Council and the Administrator.

12. Accounting/Purchasing: School accounting and purchasing procedures are governed by law and are the responsibility of the Administrator, and contracted finance services, with input from the Teacher and Parent Councils. The Board approves all accounting/purchasing transactions.

13. Fundraising: The School Fundraising Policy is governed by the Board. Fundraisers are the responsibility of the Administrator and the Fundraising Committee of the Board with input from the Parent and Teacher Councils, in compliance with board policy.

14. Facilities Management: Facilities Management is primarily the responsibility of the Administrator and site maintenance staff and is guided by legal and risk management concerns.

### **Personnel and Board Issues**

15. Grievance Process: The Board is responsible for approving the Conflict Resolution Policy with input from the Administrator and Teacher and Parent Councils. It is the responsibility of all stakeholders to utilize and follow the policy when necessary.

16. Employment:

Selection: Board members are selected through the Board Selection Committee. The Administrator is selected by the Board. Certificated teachers working more than 50% are selected through the Staff Selection Committee comprised of an equal number of parents and teachers and the Administrator with input from the Teacher Council and recommended to the Board for approval. Classified personnel are selected by the Administrator and approved by the Board. Hiring policies and procedures are governed by law and outlined in Board policy.

Evaluation: The Administrator is evaluated annually by the Board. Teachers and Para educators are evaluated annually by the Administrator; classified staff is evaluated by the Administrator.

Operations. Parent input on staff and board member performance is requested annually through the year-end survey.

Dismissal/Layoff: All employee terminations are made by the Board with input from the Administrator, in compliance with governing law.

17. Professional Development: Staff Professional Development is determined by the Teacher Council. Funding for professional development is approved by the Board and by the Parent Council if budgeted by them.

### **Legal Issues:**

18. Legal Procedures/Compliance: It is the responsibility of the Administrator and the Board to adhere to all regulatory policies and governing law.

19. Health and Safety: The Board is responsible for establishing the School's Health and Safety policy. The Administrator, Teacher Council, and classified staff are responsible for following procedures to ensure the health and safety of all students at school. Parents are requested to alert their child's teacher and/or the Administrator if they are concerned about a health or safety issue.

### **Planning for the Future**

20. Strategic Planning: The Board is responsible for strategic planning of the school with direct input from all stakeholders: parents, staff, and students.

21. Volunteer Projects: Parents are responsible for all volunteer projects under the direction of the School's Administrator.

22. Scope of Committees: School committees are determined by the Parent Council and the Administrator. Board Committees are determined by the Board.

23. Outreach/Marketing: The Administrator is responsible for outreach and marketing of the school under the direction of the Board, the Board's Marketing Committee and with input from the Teacher and Parent Council.

24. The Board will adopt board policies further clarifying Board roles and responsibilities and administrator roles and responsibilities.

### **Job descriptions of key personnel See Appendix M.**

### **Staffing plan/number of employees.**

The school will open with approximately 6.5 teachers (including a half time special education teacher), 1 paraprofessional, one administrator and one office staff. See **Appendix G and H** for staffing budget and changes over time. By year three, SMS anticipates 10 teachers, 1 special education teacher, and 1 Para-professional, administrator and office staff.

The SMS staffing plan will clarify the roles of staff, provides job descriptions, a performance management process and status reporting procedures. SMS Board has received permission from the BCSD Superintendent, Dr. Lonnie Barber, and Sage International School Principal Don Keller, to adopt policies and procedures whenever feasible. SMS will utilize as a starting place BCSD and Sage International School job descriptions and evaluation templates, adapting them to the unique needs of the charter school. Additionally, SMS will utilize the Charlotte Danielson Framework for Teacher Evaluation. See **Appendix M** for evaluation rubrics.

### **Facilities plan/planned capital improvements See Tab 2 and Appendix K.**

### **Pre-opening plan/schedule of work for next year is included in Appendix L.**

**Instructional Hours:** The Board will provide the minimum number of instructional hours for students at each grade level as follows:

#### Grades Hours

K	450
1-3	810
4-8	900

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

## FINANCIAL

### **Budget:**

The budget for SMS will be prepared in compliance with Idaho Code Section 33-801 and rules of the State Board of Education; will be presented at a public hearing in June of the year the school will open; and will be delivered to the State Department of Education as required on or before July 15 prior to the start of the school year. Copies of the budget will be provided to the public on our school Web site. The budget will be prepared, approved and filed using the required Idaho Financial Accounting Reporting Management System (IFARMS) format.

**Start-Up and Long-Term Budget:** An initial budget with forms, three-year operating budget, and first year month-by-month cash flow form are attached in **Appendix G and H**.

**Income Sources:** Funding sources will include state allocation per pupil, federal start-up grants, private grants, business partnerships and donations. Parent volunteers have already identified several potential sources of additional funding and will prepare proposals pending approval of the school by the authorizing chartering entity.

**Working Capital and Assets:** SMS does not expect to have working capital and assets until after the charter is approved. An anonymous \$500,000 pledge has been received for site and faculties costs.

**Expenditures:** Purchasing Process: The principal will determine procedures for procuring goods and services with approval from the Board of Directors.

**Payroll Processing:** SMS will outsource its payroll processing as determined by the principal with approval from the Board of Directors.

**Financial Management:** The accounting records will be kept in accordance with generally accepted accounting principles. SMS will follow the requirements set forth by the Idaho State Department of Education, including formats for account numbering. The Board of Directors will be responsible for financial management. Sage International School is providing oversight of our financial management. See **Appendix E**.



**Bonding:** Documentation of bonding of all personnel involved in the school's financial operations will be provided prior to the opening of the school.

**Revenues:** Estimates of funding sources will include state allocation as based on:  
The Support Unit Calculation for Charter Schools Charter Schools As soon as possible, SMS will notify the Idaho Department of Education's School Achievement and School Improvement, in writing, of its intention to apply for Federal Title I funds. The school will develop and implement an approved Consolidated Plan that details the programs. This plan will include, but not be limited to, a Parent Involvement Policy, Parent Compacts, participation in the state assessment and accountability system, highly qualified staff, and a scientific research-based program of support for academically at-risk students. Federal funds for Title I, Title IV-B, and the child nutrition program (if sought) will be calculated through the prescribed formulae.

SMS will follow this or a similar process for revenues:

1. Revenues will be received by the accountant/business manager, who will record the transaction in the proper account and will provide a receipt for the revenue.
2. The Principal and SMS's Board of Directors will also review the record of revenues and will approve the transactions. The preparation for and the review of the annual financial audit will provide an additional financial safeguard.

Purchasing procedure will be in compliance with State Law, Idaho Code 33-601. The board will develop and implement policies and procedures at before February 1 of the opening year. Purchases of goods or services by SMS will follow state guidelines provided by the Idaho Department of Administration, Division of Purchasing. SMS will adhere to the policies as explained in Idaho Department of Administration's Purchasing Guides or other state purchasing guidelines that the department may publish in the future to supplant these guidelines.

The purchasing procedure will be as follows:

1. A request for purchase will be filled out and given to the accountant/business manager.
2. The business manager will determine if the purchase fits the specifications of the budget line item funds the request will be paid from and if there is sufficient funds in the line item for the purchase.
3. If the purchase is approved by the Principal, a purchase order will be sent to the vendor for the purchase. The Board will decide on a dollar amount that the Principal can approve without Board approval.
4. After the item has been received and inventoried, the business manager will prepare the check. All checks will be signed by one Board member.
5. The business manager will prepare monthly financial reports for the Board that will include the dispersal of funds for the purchases.
6. The yearly financial audit will also review the purchase as an additional safeguard.

**Reports and Audits:** SMS will conduct an independent financial audit annually. A yearly independent audit will be performed as required by Idaho statute regarding audit reporting. The

SMS Principal/Business manager will provide a monthly cash-flow report and balance sheet to the Board of Directors that details revenues and expenditures for the previous month. The budget will be in the Idaho Financial Accounting Reporting Management System (IFARMS) format.

**Start-up Budget:** A copy of the estimated start-up budget is contained in **Appendix G**.

**Three Year Estimated Budget:** A copy of the three year estimated budget is contained in **Appendix H**.

**First Year Month-by-Month Cash Flow:** A copy of the estimated first year month-by-month cash flow is contained in **Appendix I**.

## FUNDRAISING

The Board of Directors, Administrator, and/or parent organizations will be responsible for fundraising efforts, if implemented, to generate capital or to supplement per-pupil allocations.

The SMS Fundraising plan will identify who is responsible for fundraising, how fundraising benefits the school and community, what resources are available, and how to develop a fundraising plan. Fundraising is a shared responsibility. The Parent Advisory conducts fundraising events throughout the year, see festivals in **Appendix P**, Student Handbook. The Administrator in conjunction with the Board applies for grants. The Administrator also oversees an annual fundraising campaign to provide resources for expenses not allowed for by state funding, i.e. facilities purchase. The Board will assume responsibility for developing a Fundraising plan, and revisit and update it annually.

The SMS fundraising strategy combined with student funding revenue will create financial sustainability for the Charter School. Fund development is an ongoing, process that engages all staff and every board member in some way. This Fundraising Strategy will become part of the Strategic Plan and should be reviewed and updated on a regular basis by the Development Committee of the Board of Directors.

Fund development provides a mix of funding that will sustain basic operations, allow for expansion of educational programs, and generate sufficient cash flow to cover operating costs. Activity associated with strengthening fund development should be taking place every day at the Charter School. It is vital to the sustainability of the school to place as high a priority on fund development as any other organizational component.

To some, fund development means having a bake sale or applying for a grant. It can and should be so much more. Fund development does include those activities, but *effective* fund development produces more than money. Fund development includes building stronger relationships, helping Board members feel comfortable asking for money, and understanding the interests of Charter School donors. This overview will outline fundraising areas and will show projections of what needs to be raised in each area. Each area has a committee associated with it that will determine the goals and timeline for each fundraising activity.

The Development Committee of the Board oversees all of the fundraising activities. The importance of preparing monthly progress reports cannot be stressed enough. These reports, prepared by the Development Director, are essential to monitoring the plan by comparing the actual results of fundraising activities with the projected incomes of each area. This information allows us to focus on activities that are productive and intervene in areas that are not. Each year the Administrator, Development Director and the Board Development Committee work together on the development plan for the year to come and provide to the Board a written evaluation of the past year's development efforts.

The fundraising objectives for SMS:

#### *Major Gifts*

The Development Committee must continually strive to identify, educate and cultivate key donors who are capable of making major gifts. These are people who are either personally motivated to give because of the wonderful education the Charter School provides their children or those who are not directly involved but are impressed by what the Charter School represents. At the Charter School all students are equally important and all potential donors are worthy of equal respect. However, from a fundraising perspective it is the donors who have been identified as having the greatest capacity to give who should receive the most time and attention from the Administrator, the Development Director, and the Board. School development personnel that focus on major gifts and major donors always raise the most money. It is not simply a process of asking someone for money and getting it. Relationships must be cultivated and once these relationships develop into donors, they must be thanked, acknowledged, and kept informed of the ongoing successes of the school.

***An anonymous gift has been pledged to SMS in the amount of \$500,000 for site and facility costs. See Appendix E for notification.***

*Timetable:*

*Cost:*

*Projected Income:*

*Point Person:* Administrator Development Director, Board of Directors

*Strategies:* Identify and create list of people with capacity; Development Director trains those making the ask. The Administrator along with members of the Board personally contacts major donors who have been identified by the Development Director and work to establish a relationship with them. Adequately thank donors within 48 hours.

#### *Annual Fund*

The Annual Fund Campaign consists of an annual appeal to Charter School families, relatives, alumni, and the Board of Directors that will raise significant, unrestricted revenue. This annual fundraising program will provide essential operating funds that are above and beyond state funding. Because state funding does not cover all of the annual costs of educating students the funds raised through the Annual Fund Campaign will help balance the operating budget which is the school's top priority. In the future these funds will support programs directly benefiting Charter School students such as enhancing the curriculum, supporting faculty professional development, and building repairs and maintenance. The Annual fund builds a donor database and gifts to the Annual Fund are tax deductible.

*Timetable:*

*Cost:*

*Projected Income:*

*Point Person:* Development Director

*Strategies:* Set financial goal. Develop materials (letterhead, remittance envelope). Identify donors. Create mailing list – board, staff, faculty, relatives, friends. Create letter defining need. Thank donors within 48 hours. Ensure 100% participation by Board of Directors.

*Special Events*

Determine the signature events for Charter School fundraising. In addition to raising money for the school the event has the potential to be used to provide good publicity and public relations. This event also provides the opportunity to add names to the database, identify volunteers and record the giving amounts of attendees that will be helpful for future fundraising.

*Timetable:*

*Cost:*

*Projected Income:*

*Point Person:* Development Director

*Strategies:* Establish volunteer committee(s). Determine theme, date, location. Create materials (posters, invitations, etc). Produce announcements for local newspapers and public service announcements for radio and television and Hang posters for event in area businesses. Thank donors and attendees within one week of event.

*Foundation Grants*

Includes written grant requests for funding as well as corporate matching gift programs which seek to maximize support for the school from business and private foundations. The approach to foundations must be based on sound research, exemplary proposal development, and establishing relationships with foundation staff.

*Timetable:*

*Cost:*

*Projected Income:*

*Point Person:* Development Director with assistance from Administrator and parents

*Strategies:* Research grant opportunities that align with the mission of the Charter School. Make direct personal contact with Foundation staff to review all grant applications. Focus efforts where you have the best chance of receiving funds. It is important to estimate how much effort and what resources are needed to write and administer a grant versus how much funding the grant will generate. Is it worth writing a grant for?

*Partnership Fundraising Options*

These programs raise money for the Charter School through everyday activities such as grocery shopping.

*Timetable:*

*Cost:*

*Projected Income:*

*Point Person:* Development Director

*Strategies:* List the partnership opportunities in every newsletter. Create a plan to educate families on all of the programs.

### *Endowment Fund/Planned Giving (or Legacy Giving)*

The Endowment Fund is the financial foundation of a school. An Endowment Fund offers opportunities for individuals to contribute to the long-term stability of the school. The money is invested and remains untouched for many years and only when there is significant interest income can that income be used for either restricted or unrestricted purposes. The principle is maintained in perpetuity. The Endowment is a permanent fund that “gives back” a portion of its annual earnings to the operating budget and provides a long term strategy for stemming steep tuition hikes and securing the schools future. Planned Giving (or Legacy Giving) allows a donor to make a gift to the school through wills, trusts, and insurance policies. This usually involves a one on one conversation with the donor to set the terms and conditions that assist the donor with estate and tax planning.

*Timetable:*

*Cost:*

*Projected Income:*

*Point Person:* Development Director

*Strategy:* Develop investment policy for the Charter School. Educate the Charter School community about the tax consequences of contributing to an endowment. Set goal for Endowment. Create informational flyer. Conduct informational meeting for families.

### *Capital Campaign*

A capital campaign has a limited scope and timeframe and is usually for the purpose of building a new facility or renovating an existing one, although capital campaigns can be used to fund any special project. Capital campaigns often run simultaneously with other fundraising activities. Feasibility studies to determine strategy and services of a consultant with specific expertise are often utilized to ensure success.

*Timetable:*

*Cost:*

*Projected Income:*

*Point Person:*

*Strategy:*

## **TRANSPORTATION SERVICES** Ref. Idaho Code § 33-5205(3)(t) & 33-5208(4)

SMS will not offer transportation services for students from the initial opening of the school in the 2014-15 school year. SMS will investigate contracted transportation options once approval is obtained. If fiscally viable, services will be offered for the second year of operation, 2015-2016.

To ensure that lack of a transportation will not negatively affect student enrollment, SMS will coordinate with the public transportation system, Mountain Rides. The BCSD presently has contracted with Mountain Rides for provide free bus passes for any BCSD student. SMS has an agreement from the Director of Mountain Rides that a similar arrangement will be extended to SMS. As per the director, \$3500 would provide bus passes for all SMS students during the school year only, with ridership occurring Monday through Friday only. This contract would be re-evaluated and adjusted based on actual ridership at the end of the first year. If discounted or free bus passes are not available to SMS students, a scholarship pool will be established to

ensure students unable to purchase regularly priced student bus passes are not eliminated from the public transportation program.

Additionally, SMS will work with the Parent Association to assist with carpooling. A portion of the registration form will contain an option for parents to share and publish carpooling information. The Parent Association will take this information, and link it to other parents seeking carpooling options. This is being modeled after an effective carpooling program developed by The Village Charter School.

Once the site is purchased or leased, a meeting will be held with the BCSD Transportation Director to seek an actual transportation bids. In an initial meeting with the superintendent, Dr. Lonnie Barber, he indicated as a charter school and using only the state transportation allotment, we would be unable to afford BCSD transportation services. A meeting will also be held with First Student Transportation in Gooding, Idaho to obtain transportation bids. Estimated field trip costs will be factored into the transportation bids. These discussions will be conducted annually until services can be offered.

Transportation for students with special needs will be provided in accordance with requirements of state and federal law. Transportation for fieldtrips, excursions, and extracurricular activities will be provided by the school through contracted services.

If or when SMS determines it can offer transportation services, these services will be offered to students within our primary attendance area, Blaine County School District (and enrolled students within 15 miles of the said charter school) when they live more than one and one-half (1 ½) miles from the facility. In accordance with Idaho Code, students who live less than one and one-half (1 ½) miles from the nearest established bus stop must provide their own transportation to such bus stop. That distance shall be determined by the nearest and best route from the junction of the driveway of the student's home and the nearest public road, to the nearest door of the building he attends, or to the bus stop, as the case may be. SMS may transport any student a lesser distance when in its judgment the age or health or safety of the student warrants. A day care center, family day care home, or a group day care facility, as defined in section 39-1102, Idaho Code, may substitute for the student's residence for student transportation to and from school. SMS will not transport students between child care facilities and home in accordance to 33-1501, Idaho Code.

### ***Student Travel To or From an Extracurricular or Co-Curricular Activity***

Unless other travel arrangements are authorized, students will board the contracted bus at the school designated as point of origin for the trip and will return to the point of origin in the bus. There will be no stops along the designated route to pick up or discharge students. The only variation allowed in this regulation is the release of students to parents in a face-to-face situation at the close of the activity before buses begin the return trip. Such release will require a signed, dated note from the parent.

**SCHOOL LUNCH PROGRAM** Ref. IDAPA 08.02.04.202, 08.03.01.401.1.0, and USDA Child Nutrition Federal Policies and Regulations



SMS will not provide nutrition services in year one. The parent handbook and student registration materials will communicate the need for students to bring their nutritious lunch and snack daily. Guidelines for what constitutes a nutritious snack are included in the parent handbook. Student will eat in their classroom unless lunch room facilities are available.

SMS is committed to modeling what is taught in the garden, farm and sustainability curriculum in which students learn to grow, harvest and prepare organically grown foods. The SMS board have already initiated discussion and visited Gooding School District to learn about their farm to table child nutrition program. SMS has also been in dialogue with the Blaine County School District child nutrition director (See **Appendix E**).

If nutrition services can be offered primarily using organic and locally grown foods and in a financially viable manner, SMS anticipates offering a school lunch program during its second year of operation, 2015-2016. The Board is committed to continuing to discuss these issues with both the BCSD and Gooding School District Child Nutrition Directors annually. The Board will only consider offering a school lunch program if it is financially viable and organic, whether it includes the National School Lunch Program funding or not.

If nutrition services are offered, the appropriate application will be included in student registration/enrollment packets. SMS will follow the annual income eligibility guidelines as established by the USDA. Additionally, if provided, SMS will provide an environment that provides students with a place where they have adequate space to eat.

#### ***D. Meal Times and Scheduling***

Whether students are provided lunch or are bringing their own, SMS will provide:

1. Students with at least 20 minutes to eat after sitting down for lunch.
2. Meal periods scheduled at appropriate times, e.g., lunch will be scheduled between 11 a.m. and 1 p.m.
3. Lunch periods scheduled to follow recess periods to encourage healthy eating habits.
4. Access to water during mealtimes, at least through water fountains.
5. Access to hand washing or hand sanitizing before students eat meals or snacks.
6. Reasonable accommodations of the tooth-brushing regimens of students with special oral health needs (e.g., orthodontia or high tooth decay risk.)
7. Student will eat in their classrooms and share clean up chores.
8. Students are encouraged to bring re-usable containers and to compost uneaten foodstuffs. Compost bins will be provided.



## **TAB 10** BUSINESS ARRANGEMENTS AND PARTNERSHIPS, TERMINATION, CLOSURE PLAN

### Description of Business Arrangements and Partnerships, Including Lease Agreements

A number of business arrangements, partnerships and Lease agreements are described below and documented in Appendix E.

Preliminary discussions have been held with the BCSD regarding possible Memorandum of Understanding (MOU) for services such as transportation, special education, ELL, ESL, school nutrition.. See letter from Dr. Lonnie Barber, Superintendent of Schools in **Appendix E**.

Preliminary discussion has occurred with Gooding School District Child Nutrition Services and the Blaine County School District for oversight on contracting with an outside provider for school lunch. See letter from Anji Baumann, Child Nutrition Director and Duane Sorensen, BCSD Child Nutrition Director in **Appendix E**.

Preliminary discussion has occurred with Sage International for accounting, payroll oversight. Once the school receives authorization, these MOU's will be developed and formalized. See letter from Don Keller in **Appendix E**.

SMS is in collaboration with the YMCA to offer collaborative after school programs. See letter from Jason Fry, CEO, Wood River YMCA in **Appendix E**.

Preliminary discussions have been held with Nurture Foundation to collaborate with SMS curriculum on farm, garden and sustainability. See letter from Amy Schlatter, Nurture Foundation Educator in **Appendix E**.

Preliminary discussions have been held with the Flourish Foundation See letter from Ryan Redman, President, and Flourish Foundation in **Appendix E**. The Foundation already provides classes for BCSD students on mindful awareness training and would like to expand to include SMS students.

Pro bono legal assistance provided by Selim Star. See letter in **Appendix E**.

Discounted bus passes have been committed for SMS student use by Jason Miller, Director, Mountain Rides Transportation Authority. See letter in **Appendix E**.

The Woods Family and Kate Woods have pledged to donate the furnishings of The Mountain School to the new school. They have additionally offered to lease the school property on a short term basis if needed.

A commitment to conduct research on SMS's behalf has been committed by Boise State University, Department of Special Education and the Pesky Learning Center (PLC). See letter from Dr. Evelyn Johnson, Professor and PLC Director in **Appendix E**.

SMS is already a member of the Alliance for Public Waldorf Schools. This membership provides SMS access to professional development, networking, consulting, legal assistance and CCSS aligned curriculum and lesson plans. See email from Stephanie Skinner, Alliance for Public Waldorf Schools Administrative Coordinator in **Appendix E**.

SMS will follow the guidelines provided by two professional organizations, Waldorf Early Childhood Association of North America (WECAN) and Association of Waldorf Schools of North America (AWSNA) regarding the legal use of the term “Waldorf” in any school publications even though the legality of the “copyright” is inconclusive. See email from Will Stapp, Director of the Alliance for Public Waldorf Education in **Appendix E**.

#### **TERMINATION OF THE CHARTER** Ref. Idaho Code § 33-5205(3)(u) & 5206(8)

SMS will follow all closure and termination procedures as outlined in any closure framework or protocol adopted by or recommended by the Idaho Public charter School Commission

In case of termination, the President of the Board of Directors will be responsible for the dissolution of Syringa Mountain School and will cooperate with the Public Charter School Commission. The board will follow all state and federal laws regarding the dissolution of a nonprofit corporation and arrange for the liquidation of assets dispersing of funds to the creditors.

When the board determines that the school will be terminated, the board president will execute the termination. The President of the Board will arrange for the sale of assets and will use the proceeds to pay creditors. Within the month after the determination to dissolve the school, the Board President will contact the parents of past and present students of how to obtain school records and/or to which school the records should be sent. They will send written notification to parents of students at their last known address and will email the parents at their last known email. The notification will explain how to request a transfer of student records to a specific school, where to obtain records before dissolution, and where the records will be stored after dissolution. They will send the records to the school that parents have requested.

Within two months after the determination to dissolve the school, the Board President will send the remaining student records to parents for whom the school has mailing addresses. Any remaining student records will be stored in a secure location for the legal limit required by an individual or organization to be determined by the board. SMS will maintain a Facebook page or similar page stating who to contact for student records.

The Board President will send personnel records to all former employees of the school within one month after the final school year.

The President of the Board will arrange for the sale of assets for distribution to creditors pursuant to Idaho Code §§ 30-3-114 and 30-3-115 of the Idaho Code. At least 80% of the proceeds will be used to pay creditors in the following order and categories:

Staff salaries, benefits

Contracted service providers: payroll, accounting, utilities, transportation, nutrition, special education

Leases, mortgages

Once appropriate assets have been used to pay creditors, SMS will donate or redistribute remaining assets to other non-profits, in accordance with and allowable by Idaho State Statute. Any assets bought with federal funds will be delivered to the Public Charter School Commission and will not be used to pay creditors. All remaining federal funds will be turned over to the Public Charter School Commission in accordance with Idaho State Statute.

Additional details of the dissolution are found in **Appendix S** Dissolution.