

UNIVERSITY *of* MISSOURI

COLLEGE OF EDUCATION

OFFICE OF THE DEAN

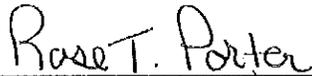
April 22, 2010

Ms. Jocelyn Strand, Director
Charter Schools/A+ Schools Office
205 Jefferson Street
PO Box 480
Jefferson City, MO 65102-0480

Dear Jocelyn:

We write to acknowledge the commitment of the University of Missouri-Columbia to serve as charter school sponsor of the Ewing Marion Kauffman School in Kansas City, MO. We have reviewed the accompanying charter school application prepared by the Ewing Marion Kauffman School and approve the charter as a Local Educational Agency pursuant to R.S.Mo 160.405.6. We are pleased to serve as the sponsor of the Ewing Marion Kauffman School and have confidence this school will provide a high-quality public school option to the students and families of Kansas City, Missouri.

Very Sincerely,



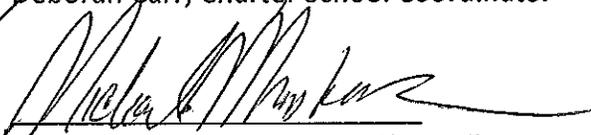
Rose T. Porter, Interim Dean



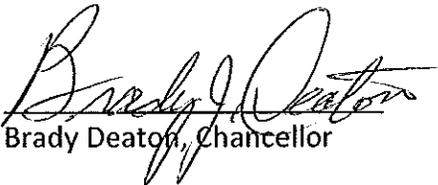
Deborah Carr, Charter School Coordinator



Brian Foster, Provost



Michael Middleton, Deputy Chancellor



Brady Deaton, Chancellor

Cc Daniel Clay, In-coming Dean, MU College of Education
Munro Richardson, Vice-President- Education, Kauffman Foundation



Charter School Application: Ewing Marion Kauffman School

Sponsor Name

University of Missouri – Columbia

Sponsor Address

**Dr. Rose Porter
Interim Dean, College of Education
118 Hill Hall
Columbia, MO 65211**

Contents

Missouri Charter School Application Cover Sheet	5
A. Education Plan	7
A.1 Mission, Vision and Educational Philosophy	9
A.2 Curriculum and Instruction	15
A.3 Career Education*	23
A.4 School Calendar and Daily Schedule	23
A.5 Target Population	25
A.6 Special Student Populations	30
A.7 School-Specific Goals and Objectives	33
A.7.1 Comprehensive Performance Measures*	35
A.8 Assessment	36
A.9 School Climate and Discipline	40
B. Organizational Plan	45
B.1 Governing Body	47
B.2 Governing Board Composition	48
B.3 Management and Operation	52
B.3.1 Education Service Providers*	58
B.4 Staffing and Human Resources	58
B.4.1 Four-Year College and/or University Affiliation*	63
B.5 Student Recruitment and Enrollment	63
B.6 Community Involvement	66
B.6.1 Joint Application*	69
C. Business Plan	71
C.1 Budget	73
C.2 Financial Management	78
C.3 Facility	80
C.4 Transportation	83
C.5 Insurance	85
C.6 Pre-Opening Plan	87

**Denotes sections required only of certain applicants*

Missouri Charter School Application Cover Sheet *page 1 of 2*

NAME OF PROPOSED CHARTER SCHOOL

Ewing Marion Kauffman School

NAME OF NOT-FOR-PROFIT 501(c)(3) ORGANIZATION THAT WILL HOLD THE CHARTER

Ewing Marion Kauffman School, Inc

PRIMARY CONTACT PERSON

Munro Richardson

TITLE OR RELATIONSHIP TO NOT-FOR-PROFIT ORGANIZATION

Member of the Board of Directors

MAILING ADDRESS

4801 Rockhill Rd. Kansas City, Missouri 64110

TELEPHONE (PRIMARY AND SECONDARY)

Primary: 816-932-1040 / Secondary: 816-932-1117

EMAIL ADDRESS

mrichardson@kauffman.org

EDUCATION SERVICE PROVIDER / PARTNER ORGANIZATION (IF APPLICABLE)

Not applicable

PHYSICAL ADDRESS OF SCHOOL (IF KNOWN)

Not applicable

DISTRICT IN WHICH THE SCHOOL WILL BE LOCATED

Kansas City, Missouri School District (33)

INTENDED OPENING DATE (SCHOOL YEAR: E.G. FALL OF 20--)

Fall of 2011

PROPOSED CHARTER TERM (NO FEWER THAN 5 AND NO MORE THAN 10 YEARS)

10 Years

ENROLLMENT PROJECTIONS (IF APPLICABLE)

School Year	Grade Level	Projected Enrollment	School Year	Grade Level	Projected Enrollment
Year One	5	75	Year Six	5-10	723
Year Two	5-6	150	Year Seven	5-11	845
Year Three	5-7	300	Year Eight	5-12	955
Year Four	5-8	450	Year Nine	5-12	1,012
Year Five	5-9	588	Year Ten	5-12	1,061

SCHOOL DESCRIPTION (150 word maximum)

Inspired by the Ewing Marion Kauffman Foundation and set to open in fall 2011, the mission of the Kauffman School is to prepare students to excel academically, graduate college, and apply their unique talents in the world to create economically independent and personally fulfilling lives. The Kauffman School will enroll seventy-five fifth graders in its first year and grow an additional grade each year, eventually serving grades five through twelve. At full capacity, the Kauffman School will graduate approximately one hundred high school seniors each year. In addition, the school will explore future development of a K-4 component. The Kauffman School is a public school, it is free and open to all students and families residing within the Kansas City, Missouri School District boundaries. The school hopes to enroll children meeting one or more “high-risk” factors defined in state statute (R.S.Mo 160.405.2), with a particular focus on students who, “. . . are at least one year behind in satisfactory completion of course work . . . have limited English proficiency . . . are eligible for free or reduced-price school lunch.”

APPLICATION CERTIFICATION

I certify that I have the authority to submit this application and that all information contained herein is complete and accurate to the best of my knowledge. I recognize that any misrepresentation could result in disqualification from the application process or revocations after award. The person named as the contact person for the application is so authorized to serve as the primary contact for this application on behalf of the organization.

Signature _____

Date _____

Printed Name _____

A. Education Plan

The Education Plan should define what students will achieve; how they will achieve it; and how the school will evaluate performance. It should provide a clear picture of what a student who attends the school will experience with respect to educational climate, structure, assessment and outcomes

- A.1. Mission, Vision and Educational Philosophy**
- A.2. Curriculum and Instruction**
- A.3. Career Education***
- A.4. School Calendar and Daily Schedule**
- A.5. Target Population**
- A.6. Special Student Populations**
- A.7. School-Specific Goals and Objectives**
 - A.7.1. Comprehensive Performance Measures***
- A.8. Assessment**
- A.9. School Climate and Discipline**

*** Denotes Sections Required Only of Certain Applicants**

Section A.1 (Education Plan: Mission, Vision, and Educational Philosophy)

Applicant Instructions

State the school's mission and briefly present your vision for how the school will operate. Describe the school's educational foundation and the culture or ethos. Include an overview of the instructional methods and any research or experience that indicates why you have chosen to use this approach with your anticipated student population.

Evaluation Criteria

A response that meets the standard will

- *Present a compelling 1-2 sentence mission statement that defines the purpose of the school;*
- *Identify the school's philosophical approach to educating students – ensure that priorities are meaningful, manageable and measurable, and focus on improving student outcomes; and*
- *Present a coherent vision of what the school will look like in 5-10 years if it is achieving its mission.*

Introduction

The Ewing Marion Kauffman School (the Kauffman School) will offer a public education option currently unavailable to the children and families of Kansas City—a school with high expectations for college and life success, measurable achievement milestones, a strategy intensely focused on student outcomes, and the best elements of nationally recognized urban charter school models realizing extraordinary student results. To create this school, the Kauffman Foundation has contributed resources and expertise to the design process, ensuring the Kauffman School is an example of what is currently working in urban education while also reflecting the vision and priorities of the Foundation within the Kansas City community. This blend of demonstrated successful practice and the Kauffman Foundation's own unique contributions will bring a public school to Kansas City where students will leave equipped to enter and excel in college, effectively understand a market economy and manage their personal finances, and appreciate the value of their own passions and talents in the rapidly changing world around them.

In its initial approach to school development, the Kauffman School Design Team worked to mine research and practices from the seventeen years of hard-earned lessons in the charter sector. Members of the Design Team have decades of combined experience in various education landscapes. In addition, Design Team members visited highly regarded public schools (both district and charter) in four different states and consulted with education experts and practitioners from across the country to understand and capture the most recent research and effective practices of highly effective urban education. The team focused on research and practices which prepare students for post-secondary success, particularly examining emerging trends appropriate for the Kauffman School's statutorily defined "high-risk" target population (R.S.Mo 160.405.2). The following list provides a brief roster of the Kauffman Foundation associates working on the charter school project, as well as the various schools and organizations who have assisted associates with the design effort since August 2009:

Kauffman Foundation Associates

- Munro Richardson
 - Vice President, K-12 Education
- Julie Holland
 - Manager, K-12 Education
- Gloria Jackson
 - Director, K-12 Education
- Nancy McCullough
 - Vice President, Finance
- Margo Quiriconi
 - Director, Education Policy and Research
- Jamie Rice
 - Senior Analyst, Finance
- Nancie Thomas
 - Manager, Kauffman Campuses and Higher Education Programs
- Joy Torchia
 - Director, Communications
- John Tyler
 - Vice President and Secretary

Kauffman Scholars, Inc (KSI)

- R. Stephen Green
 - President and CEO
- Lam Do
 - Director of Math Curriculum and Instruction
- Pam Harris
 - Executive Director of Parent Engagement
- Vanilla Lee
 - Vice President of Curriculum and Instruction
- Marilu' Mercado
 - Director of ELA Curriculum and Instruction (Reading)
- Francisco Ramirez
 - Asst. Director of Curriculum and Instruction
- Dr. Jeff Williams
 - Vice President of Higher Education
- Donna Wilson-Peters
 - Vice President and General Counsel

Contracted Resources

- Spencer Blasdale – SchoolWorks (Boston, MA)
 - Co-Founder, Academy of the Pacific Rim
- Katherine Merseth – Harvard Graduate School of Education (Boston, MA)
 - Author of “Inside Urban Charter Schools”
 - SchoolWorks associate
- Michael Buerger – Abacus Charter School Consulting (San Francisco, CA)
 - Former CFO, KIPP Foundation
- Judy DeLeon Chavez – Abacus Charter School Consulting (St. Louis, MO)
- Mike Abbott – Abacus Charter School Consulting (San Francisco, CA)

- Kirby Burkholder – Illinois Facilities Fund (IFF)
 - Director, Missouri
- Aaron North – Northology LLC
 - Former Exec. Director, Missouri Charter Public School Association

National Charter Leaders and Experts

- Yvonne Chan – Vaughn Next Century Learning (Pacoima, CA)
 - Founder, principal
 - National education expert
 - National Charter School Hall of Fame member
- Jeanne Allen – Center for Education Reform (Washington, DC)
 - President
- Kevin Chavous – Center for Education Reform (Washington, DC)
 - Distinguished Fellow
 - National education advocate and author
- Donald Hense – Friendship Public Charter Schools (Washington DC)
 - Chairman
- Thaly Germain – New Leaders for New Schools
 - Director of Charter School Strategy
- Danielle Wright – New Leaders for New Schools
 - Sr. Manager of Recruitment and Admissions
- Sarah Granofsky – Wisconsin Charter Schools Association
 - Program Director

Local Charter School and Education Resources

- Kirk Farmer – Academie Lafayette (Kansas City, MO)
 - School Board Member
 - Board President, Missouri Charter Public School Association
- Jon Richard – KIPP: Endeavor (Kansas City, MO)
 - Principal
- Brian Henke – KIPP: Endeavor (Kansas City, MO)
 - Director of Finance and Operations
- Mike Malone – Missouri Charter Public School Association (St. Louis, MO)
 - Director of Member Services and New School Development
- Shannon Spradling – Missouri Charter Public School Association (Kansas City, MO)
 - Chief Administrative Officer
- Missouri Department of Elementary and Secondary Education
 - Jocelyn Strand, Director, A+ Schools/Charter Schools
 - Kelly Kempker, Supervisor, Federal Grants Management
 - Debra Clink, School Finance/Transportation Consultant
 - Jennifer Jordan, Assistant Director, School Finance
 - Dr. Roger Dorson, Coordinator, School Administrative Services
 - John Weber, Director, School Improvement Technical Assistance
 - Pat Kaiser, Director, Financial Management
 - Karen Wooton, Director, School Food Services
 - Debbie Gerlette, Supervisor, Special Education Funds Management

Charter School Site Visits (outside Missouri)

- Achievement First (Brooklyn, New York)
- Harlem Success Academy (Harlem, NY)

- Hyde Leadership Charter School (Bronx, NY)
- The Renaissance Charter School (Flushing, NY)
- Uncommon Schools (Brooklyn, NY)
- Academy of the Pacific Rim (Hyde Park, MA)
- Boston Preparatory Charter Public School (Hyde Park, MA)
- MATCH Charter Public School (Boston, MA)
- Roxbury Preparatory Charter School (Roxbury, MA)
- New Trier Township High School (Winnetka, IL)
- Noble Street Charter School (Chicago, IL)
- Carmen High School of Science and Technology (Milwaukee, WI)

The Design Approach

One key aspect of the Kauffman School's design process reflected in this application is the belief that the school's founding leadership team should have ownership and developmental control over many aspects of the school's academic program, staffing priorities, policies, and culture. Finding the right leadership is crucial to the success of the Kauffman School (see Sections B.3 and B.4), and allowing leadership to shape the school in meaningful ways during its start-up year will establish an appropriate coherence between design and implementation. In addition to a coherent mission and vision, the Design Team has set concrete program platforms and fundamental measures for school leadership. School leaders will work with the inaugural Board of Trustees to build upon the platform presented in this application in order to meet the established measures and outcomes for students.

The Kauffman School's most immediate priority is to launch a strong fifth grade in the first operational year in order to build a strong middle school program over four years. The middle school students will then matriculate to the high school with academic expectations and cultural norms already instilled as they pursue a robust, yet highly focused, college preparatory program. Ultimately, the Kauffman School may launch an elementary grades component with the approval of its sponsor, but not before the success of the middle school is assured. The following section provides a snapshot of the general outline of the Kauffman School, followed by more detailed narrative regarding organizational fundamentals.

Kauffman School Snapshot

- A charter public school opening Fall 2011
- Enrolling seventy-five fifth graders in first year
- Growing one grade per year to serve grades five through twelve
- Full enrollment of 1,000 students in grades five through twelve by 2020
- Two 300-student middle school units feeding a 400-student high school unit
- Create a small school environment while still reaching as many students as possible
- Graduating about one-hundred high school seniors each year at full capacity
- Target population is urban students with "high-risk" factors as defined by R.S.Mo 160.405.2(4) in state statute
- School to be permanently located in area of city where high number of age-appropriate children who are likely to meet one or more "high-risk" criteria as defined by R.S.Mo 160.405.2(4) can be reached

- Emphasis on global competence; financial and technological literacy; instruction in a world language; solid foundation in math and science; self-directed learning; and honing students' individual talents
- Leadership recruitment underway in early 2010
- Pending application approval by the sponsor, DESE, and a vote by the school's board, leadership is hired by Fall 2010 to begin curriculum development, teacher recruitment, student enrollment, and facilities preparation

Kauffman School Philosophy

The Ewing Marion Kauffman School prepares students to be intellectually curious, economically independent, and confidently self-directed. *Our students live life on purpose.* They learn not to be afraid to take calculated risks in pursuit of their aspirations and understand that a life devoid of failure is a life half-lived.

The Kauffman School is unrelentingly focused on the academic and social growth of our students. We know every student in our school. Our strength is our talented staff, which combines deep subject knowledge with the ability to motivate and inspire our students to realize their individual potential.

We will help each student identify his or her unique talents and abilities and how to apply them in the world. We provide our students with a rigorous education to enable each fully to compete in our nation's colleges and universities. Our students receive strong training in math and science; all students will learn a world language. Each student will be technologically and financially literate. Our students will be prepared to contribute to their local, national, and global communities.

We expect our students will have multiple careers over their lifetimes; some of the jobs they will hold do not yet exist. Since we cannot predict the future, we prepare our students for all potential futures. We accomplish this by making sure our students are able to think critically, embrace change, and take charge of their own learning in a rapidly changing world.

The few years we have with our students are brief. To achieve these goals requires us to maximize the quantity and quality of time we have together. This is a demanding school. Our doors are open to all students and families, though success will require strength and resolve to seize the opportunity we offer. We ask much of ourselves, our students, and our families. We need our students and families to match our intensity and dedication to their futures. In return, we commit ourselves to each student's academic and personal growth.

Please Note: Measures associated with the Kauffman School philosophy are found in Section A.7: School-Specific Goals and Objectives. The specific "Educational Philosophy" is found in Section A.2: Curriculum and Instruction.

Kauffman School Mission Statement

The mission of the Kauffman School is to prepare students to excel academically, graduate college, and apply their unique talents in the world to create economically independent and personally fulfilling lives.

Kauffman School Vision Statement

The Kauffman School is recognized as the premiere public school in the state of Missouri and as a national model for the entire public school sector.

Kauffman School Ten-Year Outlook

By 2021, the Kauffman School is recognized as the premier fully open public education option in the state of Missouri, and serves as a national model for the entire public school sector. The Kauffman School is graduating its third class of high school seniors, all of whom are accepted into the post-secondary programs aligned to their respective talents and secondary achievements. The entire school community shares a common purpose and set of values dedicated to building academic and personal skills in pursuit of meaningful and productive lives. Students at all grade levels are exposed to a wide range of contexts in both traditional and non-traditional subjects—engaging in robust science, math, and technology programs while also accessing a complementary menu of liberal arts options and life education courses. The hallways and other public areas of the school give evidence to high quality student work, statements and artwork exemplifying the school's philosophy, and reflections of the school's common mission and goals.

Students are able to articulate the philosophy and mission of the Kauffman School, and describe what it means in their current work and future plans. There is a clear sense among staff and students that academic success will not only open doors to personal fulfillment, but also help students understand the wide range of opportunities available to them when they are able to combine their academic acumen with their unique gifts and interests. In grade level exit surveys, students express an understanding of why academic rigor is important and how their personal passions can be applied to make positive contributions to the community, country, and world.

At least 75% of students in the middle school grades are assessed as proficient by the time they exit 8th grade, and all incoming 9th graders are assessed as proficient or advanced before beginning their secondary studies. Students in the middle school program are acculturated with the values and skills necessary to fully engage with secondary school curriculum and are already anticipating college attendance and building career plans. Upon graduation from the 9-12 program, all students have identified and been accepted into a post-secondary course of study aligned to both their academic achievements and personal interests. They are financially and technologically literate, understand and embrace the potential for ongoing change, and are prepared to be lifelong learners.

The Kauffman School leaves a distinguishable impression on its students, with each of them knowing how they are special and confidently considering ways in which their personal qualities will make a meaningful contribution to the world around them.

Master teachers matriculate into projects and programs outside the school, influencing the practice of education and disseminating innovative approaches to student success across the country. The school is regularly visited by district, charter, and private school representatives, as well as organizations interested in improving student outcomes. The Kauffman School is open with its research and seeks to share its effective practices with others, both locally and nationally.

Kauffman School Graduate Profile

A Kauffman School graduate...

- Is prepared for the academic and social rigors of college
- Understands the wide range of opportunities available when academic acumen is combined with one's unique gifts and interests
- Can manage personal finances and understands the importance of fiscal responsibility
- Is accustomed to working hard and earning positive results
- Understands life is uncertain, but demonstrates relentless pursuit of excellence in all endeavors
- Is not only content with personal success, but also seeks to create opportunities in which others may succeed
- Exhibits confidence in the ability to adapt as personal and professional circumstances change
- Serves as a lifelong ambassador for the Kauffman School

Section A.2 (Education Plan: Curriculum and Instruction)

Applicant Instructions

Provide a description of the curriculum to be used by the school, including measurable objectives and subject area content and skills for each grade level. Show how the curriculum aligns with the Missouri Show-Me Standards and Grade Level Expectations (GLEs). Discuss the specific instructional strategies that will be relevant or necessary to successful implementation of the curriculum. Discuss how curriculum and instruction needs are reflected in plans for professional development.

For core subjects, include sample lessons from two different grade levels that illustrate strategies for implementation of the curriculum consistent with the mission and educational philosophy.

Evaluation Criteria

If the school intends to use curricula that have already been developed, a response that meets the standard will

- *Be consistent with the school's mission, education program design;*
- *Present a clear and coherent framework for teaching and learning – particularly in core academic areas – and will demonstrate alignment with Missouri Show-Me Standards and GLEs;*
- *Demonstrate understanding of relevant instructional strategies; and*
- *Present a coherent framework for professional development that is likely to support effective implementation of the curriculum.*

If the school intends to develop core curricula following approval, a response that meets criteria will

- *Present a viable plan for development of the curricula for core academic areas and for ensuring alignment with Missouri Show-Me Standards and GLEs;*
- *Describe the framework for development of the curricula for core subjects;*

- *Identify a sound research, experience or theoretical base and foundational materials that will guide curriculum development; and*
- *Present a coherent framework for professional development that is likely to support effective development and implementation of the education program.*

Introduction

The response to this section reflects the Kauffman School's intent to develop core curricula following approval of this application by its sponsor and DESE. The information in this section and the related appendices are intended to demonstrate the quality of the fundamental groundwork on which school leadership will build the Kauffman School's academic program following approval. Charter school leaders and national figures who met with the Kauffman School Design Team over the last twelve months all agree that school leadership must have a relatively high degree of ownership in the school's academic program for it to be as successful as possible in the first years of operation. The Kauffman School will heed that advice and provide that ownership opportunity to the school's founding Executive Director and Director of Curriculum and Instruction. School leaders will have a platform of expectations and measures upon which to build the school program.

In addition to the platform outlined in this application, the Kauffman Foundation will provide school leadership with a summary of the information it has collected from high-performing charter schools across the country and assist leadership in curriculum development as appropriate. The Kauffman School has taken a practical research approach in support of its academic assumptions (observations and guidance from charter school experts and practitioners associated with high-achieving schools), but recognizes the value of the academic theories often underlying those practices. The Kauffman School reserves the right to modify aspects of its Academic Program with school board approval and appropriate sponsor engagement and/or approval.

Exhibits

The exhibits included in the Appendix for this section of the application reflect the observations and research compiled by the Kauffman School Design Team over the last twelve months. In addition to the national experts and practitioners accessed by the Kauffman Foundation, the associates at Kauffman Scholars, Inc. provided a great deal of insight and informed guidance in the school's approach to curriculum development during the pre-operational year. School leadership will be charged with fully developing and finalizing the school's academic program, but the materials included here reflect the platform, philosophy, framework, and target student population on which the full program will be built. As data is collected and input from instructional staff is processed, curriculum and instruction can be revised and recalibrated throughout the year to ensure students are working toward the school's measurable outcomes.

- Appendix A.2-1: Scope and Sequence, English and Math (grades 5-8)
- Appendix A.2-2: Scope and Sequence, English and Math (grades 9-12)
- Appendix A.2-3: Scope and Sequence (Financial and Technological Literacy)
- Appendix A.2-4: Sample Lesson Plan (5th grade Mathematics)
- Appendix A.2-5: Sample Lesson Plan (9th grade English)
- Appendix A.8-1: Life Prep Assessment Options

Educational Philosophy

The Kauffman School's Educational Philosophy has its roots in the school's overall philosophy and purpose – to prepare students to excel academically, graduate college, and apply their unique talents in the world to create economically independent and personally fulfilling lives. In order to fulfill its purpose, the Kauffman School's academic program will need to be focused, well-executed, and innovative in practical ways to drive measurable improvement over consecutive years.

Intense academic growth is essential in grades five through eight to ensure that students are on grade-level before entering the high school program. Close tracking of measurable outcomes in the middle school grades is focused on preparation for high school. Close tracking of measurable outcomes in the high school is focused on ensuring students are viable candidates for competitive college and university admissions, and that they will be fully prepared for success in such institutions.

Core curriculum will align with state and national standards to set a baseline for achievement. Assessments will target cumulative content mastery throughout the year, annual academic growth, and growth to state proficiency standards over time. Whether through promotion of students already attending the school or via enrollment of students beyond the fifth grade entry point, the Kauffman School will not place a student at a particular grade level if he/she is not academically equipped to be successful with the curriculum at that grade level. All students will receive focused individual attention to help them reach their academic and personal goals, particularly students with special needs or who are identified as English Language Learners (see Section A6: Special Student Populations for more information).

In order to be prepared for both college and life success in a rapidly changing world, financial competency and an understanding of technological concepts and applications are essential. Financial and technological literacy will be vital components of the entire academic program at the Kauffman School.

Students at the Kauffman School will also be immersed in robust college and life preparation curriculum. Exposure to a broad range of non-traditional subjects through enrichment and FLASH courses (see description below) will help students explore personal interests and passions, while providing opportunities often reserved for the most elite public and private schools.

Plan for Curriculum Development

There are several key components in the Kauffman School's plan to develop an academic program aligned to the school's mission, philosophy, and vision for students. The following list provides short explanations for how each of these critical elements will contribute to the creation of the school's academic program.

Strong Platform on Which to Build: The Kauffman School Design Team has worked closely with a variety of local and national experts and practitioners to build a strong platform on which school leadership can fully develop many of the school's programs, including its academic program (see Section A.1: Mission, Vision, and Educational Philosophy for a list of resources utilized in the design process). The most important elements of the design work to date that

directly influence curriculum development are the school's measurable goals (Please see section A.7: School-Specific Goals and Objectives for more information). These goals are the non-negotiable outcomes any curriculum, instructional approach, or professional development plan will have to reach in order to be deemed successful. These goals are the heart of the school's accountability plan with its sponsor and any academic program must be focused on meeting them if the school is to remain open to students.

In addition, the Kauffman School Design Team worked with leaders from Kauffman Scholars, Inc. (KSI) to draft scope and sequence templates, course flow overviews, and a variety of sample lesson plans to provide direction to school leadership as they build the overall curriculum and instructional approach (see appendix references for these documents in following sections). Alignment with Missouri Show-Me Standards, Grade Level Expectations (GLEs) and/or End of Course standards (EOCs) are reflected in this work. The deep expertise housed at KSI in preparing urban youth for college entrance and success will be available to school leadership during the start-up year.

Undergirding this platform is the Kauffman School's philosophy and vision for students, from which the goals and measures are derived and upon which all aspects of the school are built. There is a great deal of flexibility provided school leadership in developing and implementing curriculum, but that development must take place on top of the fundamental components already established.

Director of Curriculum and Instruction: The Kauffman School will hire a two-person leadership team in 2010 – approximately one full year prior to the start of school (please see Section B.3: Management and Operation for more information). The Executive Director (ED) will be the chief administrator responsible for the overall start-up, administration, and management of the Kauffman School, including school philosophy, school design, staffing, operations, and culture. The Director of Curriculum and Instruction (DCI) will lead curriculum development and refinement, scope and sequence, student assessment, performance data processing and integration, professional development, and management and evaluation of instructional staff. While these two positions will work closely together, the DCI will focus his/her efforts on developing the best possible academic program during the twelve months prior to the school's opening. Hiring a two-person leadership team approximately one year before school opens allows one of the positions – the ED – to focus his/her attention on the organizational and operational issues while the second position – the DCI – can make developing the school's curriculum, instructional policy, assessment program, and teacher qualification profiles the top priority. Please see Appendix B.3-3 for a detailed description of qualifications and qualities sought in the school's founding DCI.

Pre-Operational Professional Development and Mentoring: The Kauffman Foundation is providing financial support to the Kauffman School during its start-up year to cover the costs of hiring the leadership team and providing them with the resources necessary to start the school strongly in August 2011. Those resources include the opportunity to participate in high quality leadership training and the chance to spend time shadowing leaders in some of the highest performing charter schools in the nation. By starting work with the Kauffman School in the late summer of 2010, the DCI will have an opportunity to engage with leaders from the highly effective charter schools listed in Section A.1. Leaders from these schools have already indicated their willingness to serve as mentors to Kauffman School leadership during the start-up year. The DCI will have an opportunity to see curriculum and instruction in action as he/she shares development ideas with some of the most successful charter school leaders in the nation. Both the ED and the DCI may also participate in one or more of the programs focused

exclusively on charter school leadership. These seminars and workshops have emerged in recent years as a response to the unique academic and operational demands of leading a successful charter school. Building Excellent Schools, New Leaders for New Schools, Rice University, Central Michigan University, and several other reputable organizations all have program components focused on building an academic program in the context of a new charter school opening. School leadership will also be able to access guidance and research from the Kauffman Foundation itself, particularly from the Kauffman School Design Team and Kauffman Scholars, Inc.

Missouri State Standards: Missouri Grade Level Expectations (GLEs), End of Course guidelines (EOCs), and Show-Me Standards will serve as the baseline upon which the scope and sequence of curriculum is developed and proficiency benchmarks are set. If a National Standards platform is adopted by DESE at a future time, the school will use that model as its baseline and set proficiency benchmarks based on it. The current state standards are constructed upon the belief that student success is dependent on both 1) a solid foundation of knowledge and skills and 2) the ability of students to apply their knowledge and skills to the types of problems and decisions they may face after they graduate. To ensure that students are provided this essential foundation, teachers in the Kauffman School will be expected to identify and use the appropriate grade and subject specific Missouri Knowledge and Performance Standards in the design and delivery of course content. Classroom observations will include an assessment of the teacher's attention to this critical element of instruction. In addition, one of the school's fundamental academic goals relates to longitudinal performance on the annual Missouri Assessment Program test (or any successor assessment program that may be adopted by DESE in the future), which will require a clear understanding of the standards on which the assessments are based. The Scope and Sequence samples (Appendix A.2-1, A.2-2, A.2-3) and sample lesson plans (Appendix A.2-4 and A.2-5) reflect the Kauffman School's understanding and commitment to utilizing Missouri state standards in its academic program.

Curriculum Framework

Although school leadership will develop the full academic program during the school's start-up year, there are several basic elements already in place around which the specific curriculum and instruction will be developed. The elements listed below reflect the school's philosophy and expectation that student academic growth will need to be accelerated in the school's earlier grades if students are to be adequately prepared for a rigorous college preparatory curriculum in high school. It also references the Kauffman School's commitment to helping students apply their unique talents in the world to create economically independent and personally fulfilling lives through exposure to non-traditional subject matter, life prep initiatives, and technological/financial literacy.

"Double" Math and English in Early Grades: In grades five through eight, students will receive two full 60 minute periods each day in English and two full 60 minute periods each day in math. In each subject, one period will be devoted to "skill building" and the other will focus on "application" of those skills in practical ways. The Kauffman School has also budgeted for two extra licensed teachers at the fifth and sixth grade levels to increase the chances of enhancing academic growth in students' first two years at the school. A sample Scope and Sequence for the middle school English and Math components is presented in Appendix A.2-1. Materials for other subject areas are available upon request.

Core Subjects Every Day: Throughout the entire Kauffman School model (grades 5-12), students will attend core subjects every day, including math, English, science, and social studies. As students progress into higher grades, they will have more options to consider in the kind of core subject courses they may want to take (AP, pre-AP, math/science options, etc), but will be required to maintain enrollment in some form of the core subjects. The school will use College Board curriculum materials for Advanced Placement (AP) courses at the high school and pre-AP at the upper middle school grades. In the middle school grades, the School Design Team has gathered research-based curricula recommended by other practitioners. The goal is to provide school leadership with curriculum models appropriate for preparing students for the high school grades, even if those example models are used only for reference in constructing a wholly new curricular framework. Curriculum packages and approaches examined by the Kauffman School Design Team in the early planning phases include Readers and Writers Workshop, America's Choice (academic intervention programs), Strategic Teaching and Evaluation (STEP) Literacy Assessment, and other research-based curricula that can be aligned to Missouri state standards and the Kauffman School's college preparatory program. The Director of Curriculum and Instruction will design the academic program during the start-up year and make final determinations regarding models, packages, and purchases as part of that process.

Focused Instruction (Time on Task): In addition to longer school days and a longer school year (see Section A.4: School Calendar and Daily Schedule), the Kauffman School will also work to ensure classroom time is spent "on task" – with students engaged in the coursework and instructional staff focused on daily objectives. In high-performing charter schools, little time is wasted on coordinating student activity or waiting for students to respond to directions. Strong lesson plans as well as a strong culture and efficient systems that are consistent throughout the school allow teachers to maintain orderly environments in which learning is the primary activity for students.

College Prep: Beginning in grade six, the college preparatory aspect of the Kauffman School's program begins to become more formal. In the middle school grades, the focus is on exposure to post-secondary opportunities and the college mindset. At the high school level, preparation for college entrance exams, college visits, and counseling with both students and families regarding college expectations take place with increasing frequency and intensity as students matriculate through the school. Preparation activities are focused on both getting into college and readiness to complete a degree program.

FLASH Courses: Foundations in Life, Academic, and Success Hours (FLASH) courses are 1-4 week courses in subjects which cover a broad liberal arts context, non-traditional sciences (astronomy, botany), financial and technological literacy, and character education. The goal of the FLASH courses is to help students identify and develop interests as well as develop life skills through the breadth of exposure to ideas and subjects typically found exclusively in elite private and public schools. FLASH courses will also be a means for instilling "life prep" into students, and consequently, contribute to building a strong school culture in which students develop an appreciation for the mission of the school.

Literacy Across All Grade Levels: Teachers at the Kauffman School will impart the necessary concepts for students to become strategic readers. It is critical for students to "learn to read" appropriately so they can "read to learn" more effectively. Professional development activities and assessments will help drive effective cross-discipline literacy instruction at the school.

Financial and Technological Literacy: Coursework and integrated curriculum in financial and technological literacy will exist in all grades at both the middle and high school levels to ensure students are receiving adequate instruction in these non-traditional subject areas. The Kauffman School will access the growing number of local, national, and international organizations providing curriculum guidance and assessment support in these two areas (i.e. the Missouri Council on Economic Education and the International Technology Education Association). Consistent with Missouri standards, teachers will focus on four broad areas of personal finance: 1) Income, 2) Money Management, 3) Spending and Credit, and 4) Saving and Investing. Completion of the state-mandated Personal Finance Course will be a component of the Kauffman School's graduation standard.

Life Prep: Life Prep content will be embedded within various courses of the Kauffman School and periodically serve as the primary focus in FLASH courses. Life Prep encompasses a broad range of subject matter ranging from personal health and hygiene to time management and organization. The Kauffman School believes preparing students for the kinds of decisions and activities contributing to a personally fulfilling life will also reduce non-academic barriers that may prevent them from completing their post-secondary studies. Several ways in which the Kauffman School's Life Prep component can be assessed are found in Appendix A.8-1.

World Language and Enrichment: All students at the Kauffman School will be required to participate in the world language program. School leadership will determine the language to be offered. The current sample school schedule (see Appendix A.4-2, A.4-3, and A.4-4) shows world language courses on a rotating schedule with FLASH and enrichment courses. In addition, all students at the middle grade level will be required to participate in state-recommended levels of enrichment coursework each week (approximately 50 minutes per week each of art, music, and PE). At the high school level, enrichment coursework will be provided to students as elective course options, though all high school students are required to enroll in the world language course.

Professional Development

There are several areas of professional development tied directly to the academic program framework presented in this application. The following narrative presents some of those areas as well as ways in which professional development may be presented at the Kauffman School and how it impacts curriculum, instruction, and student achievement. The Kauffman School calendar provides every fourth Friday as a teacher development day, meaning school is closed to students while teachers work with administrative staff on strategically determined professional development and collaborative activities. The calendar also provides opportunities for intensive professional development during teacher work-weeks prior to the beginning of the subsequent academic year. Ideally, a great deal of professional development will take place within the school. Experts will be brought to teachers at the school, staff will themselves lead aspects of the professional development program, and visits to other schools or events will be approved only if sufficient evidence can be produced regarding positive effects on student performance. School leadership will make final determinations regarding professional development strategies and options.

School-wide Professional Development Plan: School leaders will develop an annual plan to be approved by the Board of Trustees. This plan will begin with an analysis of appropriate performance data (individual and cohort academic performance, teacher evaluations, etc) and then determine key strategies for improvement as well as a specific plan to utilize the resources

of the school (Friday sessions as well as financial resources and personnel resources). Instructional staff will work with school leaders to develop the annual professional development plan and will make significant contributions to the recommendations in it. Ultimately, professional development decisions will be based on the expected positive influence an activity or program will have on teachers' ability to best serve students. Over time, data can be analyzed to identify the most effective professional development programs based on how student achievement is positively affected.

Coaching and Observation: Highly effective charter school models such as Achievement First, Uncommon Schools, and Roxbury Prep exhibit a deep commitment to teacher observation, instructional coaching, and modeling of effective practices and techniques. The Kauffman School will also integrate this critical avenue of professional development into its culture and programming. The Director of Curriculum and Instruction and highly effective teachers at the school will work with less experienced or less effective teachers through a process of evaluation, immediate feedback, and demonstration of appropriate techniques in a "real-time" environment (i.e. in the classroom during an instructional period).

Professional Learning Communities (PLCs): Teams will meet regularly (no less than 2-3 times per month) for the purposes of coaching, engagement in planning lessons, creating assessments, and determining how curriculum and/or instruction may need to be modified based on performance data. Participants read and share pertinent articles, discuss data which informs instruction, attend training sessions, and reflect on the work of the entire charter with the intent of working toward overall school improvement. Since teachers need to learn how to analyze practice, they will learn how to conduct classroom observations and give and receive feedback from peers and school leadership. Peer coaching and feedback is conducted on an ongoing basis (see above). Standards Based Instruction, Inquiry Learning, and Balanced Literacy/Numeracy may be subject areas for PLC learning.

Common Assessments - Grade level and subject area teams will be formed for the purpose of developing common assessments. Use of common assessments ensures content is taught and assessed in the same way within classrooms of a specific grade level and across classes within the same content areas. In addition, common assessments allow for analysis of data sets based on identical testing tools, providing a more complete context for possible adjustments to curriculum and instruction.

Data Interpretation and Use – Teachers will be trained to use multiple sources of data to monitor students' performance and to adjust curriculum and instruction for academic growth. Teachers can also learn how to use disaggregated data to address any achievement gaps. Learning to interpret various types of data and how to use these data will enable teachers to address academic challenges and to differentiate instruction. Teachers can then monitor and adjust instruction based upon assessment data. Teachers will not be given data sets and expected to know how to interpret and use the information in them. Training will be provided by the Director of Curriculum and Instruction and School Performance Manager prior to the start of school and throughout the year to ensure all instructional staff understand and can truly utilize assessment data.

Strategies for Teaching Urban Students – Teachers will participate in training that will equip them to build a positive, supportive learning environment and subsequently establish positive teacher-student relationships. The intent is to build classroom settings that are non-threatening and where student input and dialogue is fostered and appreciated. The role of classroom manager is most critical to creating an environment that is conducive to learning. Teachers will

learn strategies that support their efforts to impart high expectations for behavior and for learning in an urban education environment, ultimately contributing to more positive student outcomes.

Financial Literacy – Several resources exist to train teachers in how to integrate principles of financial literacy into a broad spectrum of subject-matter content. State and regional resources can be accessed at little or no charge and have curricula aligned to state recommendations (i.e. Missouri Council on Economic Education).

Technology and Technological Literacy – Workshops and practical lessons in how to integrate technology into the classroom to improve student engagement and facilitate more “time on task” can be provided. In addition, teachers can receive training in how to integrate principles of technological literacy across disciplines. Organizations such as the International Technology Education Association (ITEA) can provide resources regarding technological literacy instruction for teachers.

Special Student Populations – Teachers responsible for English Language Learners and Special Education students will be expected to be certified in order to effectively assess these learners and provide the appropriate interventions. The school’s ELL Coordinator and SPED Director can assist in both accessing training opportunities and ensuring appropriate staff members are properly certified.

Section A.3 (Education Plan: Career Education)

This section is not applicable to this application.

Section A.4 (Education Plan: School Calendar and Daily Schedule)

Applicant Instructions

Present the school calendar showing the number of days the school will be in session and sample daily class schedules showing daily hours of operation and allocation of time for core instruction, supplemental instruction, extra-curriculars, and after-school activities as applicable.

Required Exhibits

- *Sample Daily Schedule for one grade in each division at which the school intends to operate.*
- *Annual calendar for first year of operation.*

Evaluation Criteria

A response that meets the standard will

- *Satisfy the requirement for a full school term as defined in Mo. Rev. Stat. 160.011;*
- *Comply with minimum requirements for the number of school days and hours pursuant to Mo. Rev. Stat. 160.041;*
- *Align with the school’s educational mission and goals;*
- *Provide, in advance, for the make up of a minimum of six inclement weather closure days pursuant to Mo. Rev. Stat. 171.033.2*

Introduction

The Kauffman School calendar reflects the priority to ensure appropriate student academic growth in the middle grades and offer a robust college preparatory program at the high school level. The school will have an additional instructional hour each day over the state requirement for a standard school year, and an additional 30 days each year over a traditional school year calendar. The Kauffman School will use this extra time to offer “double” periods of English and mathematics in grades five through eight, as well as AP and elective courses for high school students. This extra time is also used to fulfill the unique extracurricular programs which supports the mission of the school – i.e. FIRST Robotics, FIRST LEGO League, etc. The Kauffman School reserves the right to modify aspects of its calendar and daily schedule with school board approval and appropriate sponsor engagement and/or approval. School leadership will have the freedom to revise elements of the calendar with board and sponsor approval, but the parameters for the extended day and year are fundamental components of the Kauffman School model. If regular year or summer school funding is reduced or modified in any way following submission of the charter application, the Kauffman School is prepared to pursue financial contingency options outlined in Section C.1: Budget – including, but not limited to, requesting a change in the level of support from the Ewing Marion Kauffman Foundation and/or prioritizing program costs to identify potential modifications.

Exhibits

- Please see Appendix A.4-1 for 2011-12 Kauffman School Calendar
- Please see Appendix A.4-2 for Sample Daily Schedule – Grade 5
- Please see Appendix A.4-3 for Sample Daily Schedule – Grade 8
- Please see Appendix A.4-4 for Sample Daily Schedule – Grade 9

Summary of School Calendar

- First day of school for the 2011-12 academic year is August 2, 2011
- Students will not attend school every fourth Friday to allow for staff professional development and academic planning
- The school will observe all major holidays and provide Winter, Spring, and Summer holiday periods
- The regular school year ends May 4, 2012 (174 days)
- The mandatory extended summer session begins May 14, 2012
- The summer extension ends June 26, 2012 (30 summer days, 204 total days in extended school year)
- Summer holiday runs from June 27-July 31
- The school’s six inclement weather days include President’s Day (third Monday in February) and May 7 – May 11 (week between regular and summer sessions)

Explanation

The required school year in Missouri consists of 174 days multiplied by six instructional hours each day. In a standard school year, a student will experience 1,044 instructional hours. By adding one hour each day, the Kauffman School provides a student with 1,218 instructional hours over a 174 day year. In addition, a thirty-day summer extension is mandatory for all students. Summer school days also consist of seven instructional hours per day.

Combining the 174 day school year with the 30 day mandatory summer extension brings a student's single year instructional total at the Kauffman School to 1,428 hours. The Kauffman School believes the additional 384 instructional hours each year are necessary to ensure all students are performing at grade level by the end of 8th grade, and are ready to succeed in any college or university they choose to attend by the end of 12th grade.

Over an eight year period at the Kauffman School, a student will amass 11,424 instructional hours. A student attending schools following the traditional day and calendar will receive 8,352 instructional hours over the same period. When the difference between the two totals (3,072 hours) is divided by the number of hours in a standard school year (1,044 hours), the Kauffman School student will receive **2.95 extra years** of instructional time over a student in public schools following the standard schedule. This additional time for Kauffman School students will be utilized to prepare them for both academic success in college, and personal success in their daily lives.

Statutory Compliance

The school calendar and sample school schedules included with this application adhere to (and exceed) requirements defined in Mo. Rev. Stats. 160.011 and 160.041.

In accordance with Mo. Rev. Stat. 171.033.2, the Kauffman School is designating Presidents' Day (third Monday in February) and the week between regular session and summer session (May 7, 2012 – May 11, 2012) as inclement weather redemption days.

Section A.5 (Education Plan: Target Population)

Applicant Instructions

The section on Target Population should include a completed Anticipated Enrollment Table for each year of the school's proposed charter. It should describe the anticipated population of the school and should explain how the proposed mission, curriculum, teaching methods and services align with the educational needs of that population.

***DROPOUT AND AT-RISK POPULATIONS:** Missouri sponsors are required to grant at least one-third of charters to schools that actively recruit dropouts or high-risk students as their student body. A "high-risk" student is one who is at least one year behind in satisfactory completion of course work or obtaining credits for graduation, pregnant or a parent, homeless or has been homeless sometime within the preceding six months, has limited English proficiency, has been suspended from school three or more times, is eligible for free or reduced-price school lunch, or has been referred by the school district for enrollment in an alternative program. To the extent that the applicants intend to serve a high dropout and/or at-risk population, the response should focus on this group, in particular.*

Evaluation Criteria

A response that meets the standard will

- Present evidence to indicate that enrollment projections by grade and school-wide for each year of the charter are realistic; and*
- Demonstrate a clear understanding of the students the school intends to and is likely to serve;*
- Present a persuasive explanation of how the proposed mission, curriculum, teaching methods and services are likely to meet the needs of the target population.*

Introduction

This section of the application presents information related to the Kauffman School's target student population. Additional information regarding the school's design and enrollment policies are included to provide context, however more detailed information regarding enrollment, school configuration and growth, school location, and population demographics is presented in Section B.5: Student Recruitment and Enrollment. The Kauffman School reserves the right to modify aspects of its target population and enrollment plans with school board approval and appropriate sponsor engagement and/or approval.

Target Population Description

The Kauffman School will seek to serve students with “high-risk” factors as defined by R.S.Mo 160.405.2(4). The statutorily defined risk factors identified as priorities in the Kauffman School's target population include students who are, “. . . at least one year behind in satisfactory completion of course work . . . limited English proficiency . . . eligible for free or reduced-price school lunch.” Based on enrollment data of charter and district public schools in Kansas City, the Kauffman School expects to have a free-and-reduced lunch count of eighty to eighty-five percent of overall enrollment and an ELL count of approximately ten percent. As a charter public school, the Kauffman School cannot selectively admit students based on academic aptitude, race, ethnicity, income level, special education needs, prior school record, or almost any other personal characteristic. The school will be required to take students on a first-come-first-served basis until its enrollment threshold is met. In the event there are more applications than seats; the school will use a lottery process to give every applicant an equal chance of admission. In order to ensure the school continues to serve its target population over time and in accordance with R.S.Mo 160.410.2(1), the Kauffman School will provide a geographical enrollment preference to students living in five zip codes where statutorily defined “high-risk” factors are prevalent – 64123, 64124, 64127, 64128, and 64130. The school plans to locate its permanent facilities within the enrollment preference area, though it may need to utilize a temporary facility outside the area during its initial operational period. The school will focus its marketing and recruiting efforts in those areas of the city where the likelihood of students exhibiting at least one of the “high-risk” factors identified in state statute is greatest (R.S.Mo 160.405.2).

Achieving Target Enrollment Projections

There are ways in which the Kauffman School can better ensure it reaches and continues to enroll the statutorily defined “high-risk” population (as defined in R.S.Mo 160.405.2) it seeks to serve. Despite the general prohibition on admission requirements, the charter law does provide some means to set admission preferences. These include geographic enrollment and sibling enrollment preferences. In addition, the Kauffman School can focus its marketing and outreach programs to reach its target population.

The Kauffman School will provide geographical enrollment preference to students living in areas of the city where the prevalence of statutorily defined “high-risk” factors is high (please see above). In addition, the school will take other steps to ensure it effectively reaches its target population, while still remaining accessible to as wide a swath of the city's population as possible. The school will seek to locate permanently in an area of the district where it is most

accessible to its target population and where access to high-performing public school options is limited. The school will also focus its marketing and recruitment efforts in areas of the city where its target population is likely to reside. The Kauffman School will employ the sibling enrollment preference pursuant to R.S.Mo 160.410.2(2) in order to better retain students who may leave the school if their younger siblings are compelled to attend a different district or charter school due to full enrollment. Students whose parents are employed at the Kauffman School will also receive admission preference pursuant to R.S.Mo 160.410.2(2).

One of the “high risk” factors presented in R.S.Mo 160.405.2(4) concerns students who are at least “one year behind in satisfactory completion of course work ...” The Kauffman School considers “proficiency” the standard for satisfactory completion of coursework and will reach out to students in the district who may be struggling to reach proficiency in their current district or charter public school. Much of the public school sector in Kansas City (district and charter) demonstrates generally low performance on the annual Missouri Assessment Program (MAP) test. A review of 2009 MAP test results for the district as a whole and the fifteen charter schools serving middle grade students shows¹:

- Eleven out of fifteen charter schools serving grade five did not achieve thirty percent proficient or advanced status among 5th graders in communication arts
- Eleven out of fifteen charter schools serving grade five did not achieve thirty percent proficient or advanced status among 5th graders in mathematics
- Among all district public schools, only twenty-three percent of fifth graders scored proficient or advanced in communication arts
- Among all district public schools, only twenty-one percent of fifth graders scored proficient or advanced in mathematics
- Out of fifty-seven middle and fifteen high schools (district and charter) in the Kansas City, Missouri School District, only 16 percent and 7 percent, respectively, had at least 50 percent of students score at proficient or higher on the 2009 annual state assessment for mathematics

In short, there is a high probability students living in many areas of the Kansas City, Missouri School District will be at least one year behind their peers academically in fifth grade, whether they attend district or charter public schools. The Kauffman School is intentionally designed to serve students in the middle grades who may be one or more years behind both their state and national peers.

School Configuration in Support of Target Population²

The Kauffman School will start small. In the initial year, the school will enroll seventy-five fifth graders, comprised of three classes of twenty-five students. Research regarding optimum school class sizes is extremely varied.³ Observations of high-performing charter schools suggests a class size of twenty-two to twenty-five students is appropriate for the middle grade levels, particularly with strong teachers leading each classroom. Depending on how school administrators want to configure courses and mix resources among grade levels, the number may fluctuate upwards as the school adds grades, but is not likely to trend downward except for

¹ Based on MAP test data as provided by DESE in August 2009.

² Please see Appendix B.5-1 for school enrollment table.

³ United States Department of Education, “Research on the Academic Effects of Small Class Sizes,” Archived Information, <http://www2.ed.gov/pubs/ClassSize/academic.html> (accessed November 5, 2009).

special courses or other appropriate circumstances such as targeted instructional support or academic intervention.

The focus in the initial year will be on building the overall school culture, creating strongly engaged classroom cultures, developing teachers, and establishing the structures and systems of the school. The school will gradually grow in the following years into three “sub-schools” or units – two units of three hundred students each serving grades five through eight, and a single high school unit of approximately four hundred students serving grades nine through twelve. For more detailed information regarding school configuration, please refer to Section B.5: Student Recruitment and Enrollment.

The Kauffman School will be configured to serve approximately 1,000 students in grades five through twelve. The average enrollment in Kansas City charters is 427 students, ranging from a low of 126 to a high of 1,254.⁴ The Kauffman School’s target population is urban students meeting at least one of the “high-risk” factors defined in state statute (R.S.Mo 160.405.2), with a particular focus on students who qualify for free/reduced lunch, are Limited English Proficient, or may be one more years behind state proficiency standards. Based on information provided by existing charters serving middle school grades, a bevy of national research, and an analysis of Missouri MAP results in Kansas City, the Kauffman School anticipates the vast majority of students in its annual incoming fifth grade cohort will be performing at least one academic year behind state standards, with many students two or more years behind.

The Kauffman School intends to reach its aggressive outcomes for students despite this anticipated incoming deficit by using the middle school grades to “prep” students for the “college prep” program in high school. The school’s mission to prepare students for college graduation requires students to be ready by ninth grade for rigorous college preparation. A school beginning in the middle grades can successfully prepare students for a rigorous college preparatory high school through focused efforts and exceptional execution. Students at the Kauffman School will receive double periods of Math and English throughout the middle school grades. In the fifth and sixth grades, the school will have two certified teachers in both Math and English classrooms to ensure as much academic growth as possible occurs at this critical phase of students’ school careers. Regular assessments measuring content mastery within the school year, single-year academic growth, and longitudinal academic growth over several years will provide the Kauffman School with rich data sets to track individual student progress and adjust curriculum and instruction as appropriate based on student performance. A longer school day and school year, combined with designated periods each week for remediation and homework assistance, will also be critical components of the school’s academic program (please see Section A.2 for more detailed information regarding the Academic Program).

Financial and technological literacy curricula, combined with an integrated character education component, will also prepare students to interact with others appropriately while competently managing their personal affairs in a rapidly changing world. The Kauffman School is focused on seeing students graduate successfully from college, which means strategic support must be provided following high school graduation to ensure students are encouraged to complete their post-secondary studies when challenges arise. The Kauffman School is committed to providing that post-secondary support and tracking graduate progress through counselor follow-ups, formal surveys, and an alumni network.

⁴ Based on September 2009-10 enrollment data provided by DESE.

The decision to focus on middle and high school also correlates with the areas of greatest need in the Kansas City community. Out of fifty-seven middle and fifteen high schools (district and charter) in Kansas City, only 16 percent and 7 percent, respectively, had at least 50 percent of students score at proficient or higher on the 2009 annual state assessment for mathematics. Urban families in Kansas City have very few high-quality public middle or high school options, whether district or charter.

The Kauffman School's five-through-twelve configuration also follows the national trend among high-performing charter school models such as Achievement First, Uncommon Schools, and KIPP. These networks have multiple middle schools feeding a single high school. Aside from a few idiosyncratic examples, all of the nationally recognized high-performing charter school models examined in the design process have middle schools that feed into high schools. Virtually no one has figured out how to prepare students late in their academic and social development for college success in a "stand alone" school serving grades nine through twelve without exploring a residency model, or providing large numbers of volunteer in-house tutors (MATCH Charter Public High School in Boston, MA). The advice the Kauffman School received from multiple charter school practitioners and experts, even MATCH leaders, is to "grow your own" in middle school, preparing students for a rigorous college preparatory high school education.

Student Retention

The Kauffman School Design Team has devoted considerable attention to creating a program in which students and families can commit for eight years. While a certain amount of student mobility among a statutorily defined "high-risk" population is expected (R.S.Mo 160.405.2), the Kauffman School will provide regularly scheduled, highly focused family engagement opportunities to make the school a friendly and useful place for students and families. Our first priority is to select and support teachers and leaders who will take on the responsibility for doing "whatever it takes" to ensure student success and family engagement. Prior to the start of school each year, a series of information fairs and get-togethers will be hosted to acquaint new students and families with expectations, staff, and resources, while building community among families already enrolled. These informational meetings are especially critical as the Kauffman School will expect a great deal from its students, both academically and personally. Families need to understand that for students to realize the vision of the Kauffman School in their own lives, a great deal of work and sacrifice will be involved by both staff and students. There are no shortcuts, but the Kauffman School will provide any reasonable support possible to ensure students have the opportunity to succeed.

Daily attendance follow-ups for absent students, personal meetings between staff and families to discuss positive and challenging circumstances associated with a student's performance, and regular contact outside the school calendar are other ways the Kauffman School hopes to reduce student attrition. Based on the experiences of schools like Academie Lafayette in Kansas City, and Academy of the Pacific Rim and Roxbury Preparatory Charter School in Boston, solid outcomes and consistent performance are also ways to keep students attending year after year. These high performing charter public schools attribute higher student retention with student success, particularly alumni in college. Based on data acquired from local charter schools and the high-performing models visited in other states, the Kauffman School anticipates its annual retention rates to run between eighty and eighty-five percent in its first five years, and improve to near ninety percent as the school matures. The Kauffman School will establish its

reputation for positive student outcomes as quickly as possible to build its reputation among the communities it serves.

Section A.6 (Education Plan: Special Student Populations)

Applicant Instructions

Describe the school's plan for educating children with special needs, particularly those with limited English proficiency and those identified with disabilities. Explain specifically how these students will be identified, how the school will develop plans for their education, how their progress will be monitored, and how the school has budgeted and staffed to meet those responsibilities. In addition, explain how the school's curriculum and approach to instruction will be designed or adapted to serve those students.

Evaluation Criteria

A response that meets the standard will

- *Demonstrate understanding of and capacity to meet state and federal requirements regarding identification and education of the likely ELL population;*
- *Demonstrate understanding of and capacity to meet state and federal requirements regarding the identification and education of students with disabilities;*
- *Indicate a commitment to serving the full range of needs of students with disabilities; and*
- *Indicate a commitment to serving the full range of needs of special education students.*

Introduction

The Kauffman School will educate all enrolled students with intensity and a shared level of expectation. A student's individual needs or special accommodations will in no way influence their access to the free and open public education provided by the Kauffman School. Students with special needs will be accommodated to meet applicable state and federal laws, but more importantly to help them realize their full academic and personal potentials. The Kauffman School will hold all students to a high standard and will work to ensure appropriate mechanisms and resources are in place to support all students in pursuit of those standards. This section focuses primarily on English Language Learners (ELL) and Special Education (SPED) students, though Kauffman School leadership will be charged with providing adequate accommodations for other special populations as well (i.e. gifted/talented). The Kauffman School reserves the right to modify aspects of this plan with school board approval and appropriate sponsor engagement and/or approval.

English Language Learners (ELL)

Kansas City is home to residents from a variety of different backgrounds speaking English as a second language. In order to be conservative in financial planning, the school includes a 10% ELL estimate for revenues in its budget, though it is possible the ELL percentage could be higher as the school intends to make reaching this population an important part of its marketing efforts. School leadership will have the freedom to make adjustments to the ELL budget and specific services offered depending on the enrolled population, but the Kauffman School will

adhere to national and state policies regarding Limited English Proficient identification and education – the *Elementary and Secondary Education Act of 1965*, as amended, Title III, Secs. 3111–3141; 20 U.S.C. 6821–6871, and applicable Missouri statutes under Chapter 160.

Staffing: The Kauffman School has budgeted for an ELL (English Language Learner) Coordinator at each of its middle school units, and at the high school level. These professionals will coordinate identification and support activities for ELL students and work with teachers to develop appropriate instructional techniques, curriculum modifications, viable assessments, and provide classroom assistance for identified students. The ELL Coordinator will also serve as a critical communications point for the families of ELL students. Several teacher aides are also included in the budget, and these positions can be modified to focus more specifically on the school's ELL population as needed. The ELL Coordinator will also arrange professional development opportunities for all teaching staff regarding ways to improve services to ELL students. The school's ELL staff will be appropriately licensed and credentialed as required.

Identification, Accommodation, and Assessments: The process of identifying and assessing English Language Learners begins with the school's initial student enrollment form and proceeds under the administration of the ELL Coordinator and school leadership. Appropriate accommodations as well as adequate assessments are developed and implemented to determine both language proficiency and content mastery. The following activities are part of that process:

- Student enrollment form is printed in English and other languages based on known populations living within the district boundaries
- A short Q&A section of the enrollment form asks families to check answers to questions regarding primary home language and student's English proficiency
- A home survey is administered to families who indicate English is not a student's primary language
- Students are assessed for BOTH language proficiency AND subject matter knowledge in order to appropriately identify necessary services and grade placement
- The ELL Coordinator develops an accommodations profile and Individual Learning Plan for students based on the diagnostic assessments and home survey
- The ELL Coordinator works with teaching staff and aides to ensure appropriate accommodations are provided throughout the school year, including any necessary classroom assistance or integrated programming
- The ELL Coordinators will monitor development of Missouri's Grade Level Expectations (GLEs) for students learning English as a Second Language and implement those standards as appropriate
- ELL students will be assessed for both language acquisition and content knowledge to avoid gauging a student's academic progress solely on language proficiency.
- Students will be promoted based on knowledge and performance, not on language acquisition
- The Missouri LAS Links Assessment will be used for measuring longitudinal progress for ELL students over time
- School leadership will work with the ELL Coordinator to identify appropriate assessments and to modify internal assessment tools as appropriate for ELL students

Special Education and Students with Disabilities

Based on typical charter school enrollment data, the Kauffman School estimates 10% of its students will be identified as Special Education (SPED). School leadership will have the freedom to make adjustments to SPED services and resources depending on the enrolled population. The Kauffman School reserves the right to modify aspects of its services and programming with school board approval and appropriate sponsor engagement and/or approval. The Kauffman School will adhere to national and state policies regarding Special Education identification and accommodations – Individual with Disabilities Education Act (IDEA) Part B, Americans with Disabilities Act Title II, Rehabilitation Act Section 504, and applicable Missouri statutes primarily located under Section 7 of Chapter 162. In compliance with Federal law, the Kauffman School will annually submit to DESE a local compliance plan that indicates how a free and appropriate public education will be provided to children with disabilities. The school will comply with the local compliance plan, the state plan, and state and federal laws and federal regulations. The Kauffman School will use the state standards and indicators manual for guidance in establishing and implementing its special education plan.

Staffing: The Kauffman School budget includes funding for Special Education Directors at both the middle and high school levels. These individuals will be charged with coordinating identification, assessments, Individual Education Plan (IEP) creation, monitoring, aligned professional development, and code/legal compliance. The Kauffman School is budgeting significant funds for contracted SPED services until more specific needs are identified in the enrolled population (i.e. occupational therapy, speech pathology, psychiatric services, assessment, etc). Contracted services will be under the management of the SPED Director. The SPED Director will also work to ensure any facility occupied by the Kauffman School is ADA compliant within 90 days of occupancy. Several teacher aides are also included in the budget, and these positions can be trained or modified to focus more specifically on the school's SPED population as needed. The SPED Director will coordinate professional development opportunities for all teaching staff regarding ways to improve services to special needs students. A school counselor with a background in social work and children's issues will be at each middle school unit and may serve as a support to the SPED Director in the activities outlined above.

Identification, Accommodation, and Assessments: The SPED Director will be charged with coordinating student identification (including teacher training), working with students' previous schools to access appropriate records, managing IEP development and implementation, monitoring, assessment, and communications with families of SPED students. School leadership will work with the SPED Director to develop appropriate programs and protocols regarding the identification and assessment of SPED students at the Kauffman School. This may include the Response to Intervention (RTI) model, which "integrates assessment and intervention within a multi-level prevention system to maximize student achievement and to reduce behavior problems."⁵ A program like RTI allows all students to be held to high standards, while providing a series of assessments and checkpoints to ensure they are supported in working toward those standards. The role of staff focused on serving special needs students is to find ways in which the Kauffman School can help students reach their highest possible level of achievement.

⁵ <http://www.rti4success.org/>

Section A.7 (Education Plan: School-Specific Goals and Objectives)

Applicant Instructions

Like all public schools, charter schools are subject to state accountability requirements. For all approved schools, the charter contract will include a set of core educational performance expectations that reflect state accountability requirements and the Sponsor's Performance Expectations outlined in the Missouri Monitoring and Renewal Framework. In addition to those standard requirements, most schools have goals that are particular to the school's educational philosophy and organizational priorities.

Identify two key academic goals and one non-academic goal for which the school plans to hold itself accountable. Explain how those performance standards align with the school's mission, the proposed educational program, and the statewide accountability system. Well-developed school-specific goals will have the following characteristics:

- *Specific*
- *Measurable (based on identified indicators and expected performance levels and a reliable measurement instrument)*
- *Ambitious and attainable*
- *Relevant (to your mission)*
- *Time-bound*

Evaluation Criteria

A response that meets the standard will

- *Align with the school's mission and educational program;*
- *Define goals and objectives that are specific, measurable, ambitious and attainable, relevant, and time-bound;*
- *Align with the Sponsor's Performance Expectations outlined in the Missouri Monitoring and Renewal Framework;*
- *Set high standards for student learning; and*
- *Present clear criteria for promotion from one level to the next, and for graduation.*

Introduction

Every successful charter school has clear goals and measures designed to track progress toward overall objectives, as well as provide instructional staff with vital data which can be used to modify or enhance curriculum and instruction throughout the school year. The goals listed in this section provide the cornerstones of accountability for the Kauffman School. The detailed benchmarks and implementation of assessments will be determined by school leadership, but these fundamental goals will stand as the most direct link between the school's vision for its students and the measurable ways in which fulfillment of that vision can be gauged. By meeting the goals listed below, the school will comply with AYP, MAP results, and other recommended measures outlined in the Missouri Monitoring and Renewal Framework, including any successor assessments or systems administered by the State in future years. The Kauffman School reserves the right to modify aspects of its school goals and objectives plan with school board approval and appropriate sponsor engagement and/or approval.

Charter Contract

The measurable goals in this section are at the heart of the charter agreement between the Kauffman School and its sponsor, the University of Missouri-Columbia. The school and sponsor will develop a performance contract defining the appropriate level of sponsor engagement in various aspects of the school's operations, governance, and performance. The contract will clearly define aspects of charter renewal criteria and processes, as well as the reasons and processes associated with revocation. Until the performance contract is finalized by both parties, the information provided in this application and all parameters defined in charter school statutes R.S.Mo 160.400 – 160.420 will serve as the school's formal charter agreement with its sponsor and the State.

Kauffman School: Academic Growth Goals

- At all grade levels, students at the Kauffman School will average 1.25 years of annual academic growth as measured by multiple administrations of a nationally norm-referenced growth-measured exam.
- At least seventy-five percent of students enrolled at the Kauffman School for three consecutive years will achieve Proficient or Advanced status in all assessed subjects on the state's annual MAP Test, or the equivalent on any successor assessment administered by the State in future years.

Kauffman School: College Preparation Goals

- Average scores on the SAT or ACT exams will be at the 75th percentile nationally.
 - Based on 2007 data of college bound seniors, the 75th percentile indicates a total SAT score in Critical Reading, Mathematics, and Writing of 1730 or an ACT score of 24.
- At least seventy-five percent of all graduating seniors at the Kauffman School will earn a score of three or higher on at least one Advanced Placement exam during their time at the school.
- At least seventy-five percent of all graduating seniors from the Kauffman School will be admitted into and attend a four-year college or university program after high school.

Kauffman School: Life Preparation Goals

- At least seventy-five percent of students completing the 8th and 11th grades will be able to pass an age-appropriate financial literacy assessment.
- At least seventy-five percent of students completing the fifth, eighth, and 10th grades will be able to pass an age-appropriate technological literacy assessment.

Kauffman School: School Success Goals

- The Kauffman School will demonstrate at least a seventy five percent overall satisfaction rating in an annual survey administered to key stakeholder groups at the school— parents/guardians, students, and teachers.
- The Kauffman School will maintain an average daily attendance rate of ninety-five percent or higher.

Promotion and Graduation Standards

Core curriculum will align with state and national standards to set a baseline for achievement. Assessments will target content mastery, annual academic growth, and growth to state proficiency standards over time. The Kauffman School will enroll all incoming fifth graders at the fifth grade level, regardless of their skill level. All students will receive focused individual attention to help them reach their academic and personal goals. The Kauffman School will not promote a student to the next grade level if he/she is not academically equipped to be successful with the curriculum at that grade level. Students attending the school will be promoted based on standards developed by school leadership. Students enrolling at the school beyond the fifth grade entry point will be assessed and placed in the grade level where they will have the best opportunity to master content and prepare themselves for promotion to the following grade. More information regarding promotion standards is available in Section A.8: Assessment.

Graduation requirements for the high school will include academic performance in core subject areas, as well as compliance in non-academic requirements associated with preparation for successful college completion. With the Kauffman School's first graduating class nearly eight years distant from the submission of this application, school leadership will be given the opportunity to define specific graduation requirements. Those requirements will align to Missouri state standards and reflect the school's promotion standards at lower grade levels. Special needs populations will be assessed in accordance with state and federal policy when determining promotion and placement.

Section A.7.1 (Comprehensive Performance Measures)

This section is not applicable to this application.

Section A.8 (Assessment)

Applicant Instructions

Describe the school's approach to assessment. Explain how the school will evaluate progress of individual students, cohorts over time, and the school as a whole toward meeting the statewide requirements. In particular, describe how the school will determine proficiency (by grade, achievement level, or grouping level) for mathematics and communication arts and one other subject on an interim basis. For high school courses, what is the school's plan for developing and using end of course assessments?

What are the school's policies and criteria for promoting students to the next level and for graduation from the school?

How will the school use assessment information to modify the educational program and improve instruction, student learning, and staff development?

Evaluation Criteria

A response that meets the standard will

- *Align with the school's mission and overall educational priorities;*
- *Demonstrate understanding of the school's obligation to participate in the statewide system of assessment and accountability;*
- *Present a clear, credible, and sound plan for measuring and reporting the educational performance and progress of individual students, cohorts, and the charter school as a whole including valid and reliable measures of student outcomes;*
- *Explain how the school will use assessment data to drive key decisions aimed at improving academic outcomes; and*
- *Demonstrate understanding of and commitment to compliance with assessment requirements applicable to all Missouri public schools consistent with state law and relevant policies of the State Board of Education including the MAP and end of course exams, as applicable.*

Introduction

Assessment of student progress at different points in time is critical to the Kauffman School's ability to drive academic growth and ensure graduating students are adequately prepared for success in college. The Kauffman School will assess progress toward mastery within the school year, annual academic growth, and gains over multiple years. Assessment data will serve as a cornerstone for professional development and collaboration among teaching staff. School leadership will make final determinations regarding assessment tools and timelines, but the academic goals presented in Section A.7: School-Specific Goals and Objectives set the expectations and parameters for how assessments will be utilized at the school. Other areas where assessment will be used to measure progress toward established goals include financial and technological literacy, as well as Advanced Placement (AP) exams at the high school level.

The Kauffman School is committed to avoiding "social promotion," whether through progression between grades for enrolled students or enrollment of students at the school beyond the fifth grade. Its promotion and graduation standards and assessments will be finalized by school leadership, but will reflect the high expectations the Kauffman School has for its staff and

students. Policies will be fair and consistently implemented, with appropriate accommodations and allowances for students with special needs. In addition, the Kauffman School will employ a School Performance Manager beginning in Year One to collect, analyze, and report on data for internal staff activities and external dissemination of information related to school performance.

The Kauffman School will comply with Missouri statute and State Board of Education policies regarding assessment requirements for charter public schools – R.S.Mo 160.405.1(2), 160.405.5(6) – and applicable sections for all public schools found in R.S.Mo 160.518. The Kauffman School reserves the right to modify aspects of its assessment program with school board approval and appropriate sponsor engagement and/or approval.

Annual Growth

The Kauffman School will utilize an annual nationally norm-referenced growth assessment tool in order to measure academic progress of students each year. For example, the Northwest Evaluation Association’s Measures of Academic Progress (NWEA) provides an adaptive, computer-based exam that can be aligned to Missouri standards while also gauging performance relative to peers across the country. With an assumption that students will enter the fifth grade at the Kauffman School between one and three years behind grade level, average annual academic growth of 1.25 years is essential to ensuring all students have the opportunity to be assessed at grade level by the end of eighth grade. This goal is reflected in Section A.7: School-Specific Goals and Objectives of this application. When school leadership decides to adopt the NWEA assessment or a similar tool, the test will be administered at the beginning, middle, and end of each school year to track both progress toward, and achievement of, annual growth goals. Data will be analyzed at the individual student and cohort level to identify areas where particular students may need further assistance to reach academic goals.

Growth Over Time

The Kauffman School will administer the annual Missouri Assessment Program (MAP) test to students in accordance with state policy, or any successor assessment tool adopted by DESE in subsequent years. The school anticipates many students will perform below proficiency in the early middle grades due to incoming academic deficiencies, but has set a clear goal that at least seventy-five percent of students enrolled at the school for three consecutive years will achieve proficient or advanced status in all assessed subjects by the end of third year. Achieving this academic goal, also listed in Section A.7: School-Specific Goals and Objectives, will make the Kauffman School one of the highest performing public schools in the Kansas City Missouri School District in the seventh grade and beyond.

Cumulative Assessments

Missouri’s Grade Level Expectations (GLEs), Show-Me Standards, and End of Course objectives (EOCs) will serve as the baseline for learning outcomes in the school’s Academic Program (see Section A.2: Curriculum and Instruction). Cumulative exams will be given in all core subjects on a regular basis (i.e. every 4-6 weeks) to assess student progress toward proficiency benchmarks. Results of the cumulative exams will be processed by each school unit’s Director of Curriculum and Instruction and the charter’s School Performance Manager. Curriculum and instructional approach can be recalibrated for individual students and cohorts

based on areas of the cumulative exams where outcomes are lower than expected. Data can be analyzed at the individual student and cohort level to identify areas where particular students may need further assistance to progress toward proficiency standards.

Additional Assessments

Kauffman School leadership will work to avoid making students' experiences at the school feel "test heavy," while also acquiring necessary data to measure progress toward the school's academic goals. Measures of student acumen in financial and technological literacy will take place at both the middle and high school levels to ensure students are receiving adequate instruction in these non-traditional subject areas. The Kauffman School will access the growing number of local, national, and international organizations providing curriculum guidance and assessment support in these two areas (i.e. the Missouri Council on Economic Education and the International Technology Education Association). Completion of the state-mandated Personal Finance Course will be a component of the Kauffman School's graduation standard.

The Kauffman School expects at least seventy-five percent of its high school students enrolling in at least one Advanced Placement course and successfully earning a score of three or higher on the corresponding exam. School leadership will access these programs and the accompanying training and materials via the College Board – a national nonprofit supporting student success and opportunity in college. Students in later middle grades and early high school grades may also participate in the College Board Standards for College Success program, which includes Pre-AP curriculum in mathematics, English, and other core subjects. College entrance exams such as the SAT and ACT will be part of a student's high school experience, but familiarity with the vocabulary and skills necessary to be successful on those tests will be integrated into the school's curriculum beginning in 6th grade. While a student's classroom grade may not be influenced by performance on a college entrance exam or pre-test, the school will be held accountable for performance through its aggressive College Preparation Goals regarding ACT and SAT performance – please see Section A.7: School-Specific Goals and Objectives for more information.

In addition to academic success, the Kauffman School seeks to prepare students for personally fulfilling lives through an integrated "Life Prep" curriculum. The success of the Kauffman School's Life Prep program can also be measured, though in a more qualitative fashion than strictly quantitative academic assessments. Appendix A.8-1 provides an overview of the types of assessments school leadership can access to measure the effectiveness of the Kauffman School's Life Prep curricula.

Individual and Cohort Student Data

Throughout the school year, the annual growth assessment and cumulative exams will allow teachers and administrative staff to track the progress of students on an individual basis. In addition, cohort data can be accessed to measure progress of group's specifically designated by the state under the federal No Child Left Behind Act (NCLB). Data disaggregated by student designations and demographic characteristics – such as ELL, SPED, free/reduced lunch, and racial identity – will be used to measure the school's effectiveness in educating specific groups of students and for gauging progress toward proficiency benchmarks under Adequate Yearly Progress criteria. Instructional approach, curriculum, and support services can be modified based on this regularly acquired and analyzed data.

Assessment and Staff Development

In the high-performing schools examined by the Kauffman School Design Team, the mechanisms for collecting assessment data and using it to drive more effective instruction were critical to realizing strong student outcomes. The Kauffman School has budgeted for a School Performance Manager in Year One to collect, analyze, and report on data for internal staff activities, regular board updates, and external dissemination of information related to school performance. Working closely with each school unit's Director of Curriculum and Instruction, the School Performance Manager can assemble quantitative assessment results from annual growth and cumulative exams to provide instructional staff with information critical to identifying areas where more focused attention or recalibration of curriculum and instruction is required. The Kauffman School's annual calendar denotes every fourth Friday as a staff work day, meaning students are not in attendance. This regularly scheduled time will provide teachers, ELL Coordinators, SPED Directors, and administrative staff the opportunity to review assessment data and strategize on ways to increase progress toward established performance goals.

Promotion and Graduation Standards

Kauffman School leadership will determine the specific criteria related to student promotion and graduation. The school's philosophy and dedication to student success suggests that whether through promotion of students already attending the school or via enrollment of students beyond the fifth grade entry point, the Kauffman School will not place a student at a particular grade level if he/she is not academically equipped to be successful with the curriculum at that grade level. The Kauffman School will enroll any student of appropriate age living within the KCMSD boundaries, but will assess a student's incoming academic level once that student is enrolled to determine at which grade level he/she will best be able to master content and ultimately reach their full academic potential. All students will receive focused individual attention to help them reach their academic and personal goals, particularly those requiring extensive remediation or intensive support. Special needs populations will be assessed in accordance with state and federal policy when determining promotion and placement. The Kauffman School will also communicate clearly and consistently with parents/guardians regarding promotion and placement policies to ensure all parties understand the reasoning behind any decision and can view the best interests of the student in proper context.

The vision for Kauffman School graduates is presented in Section A.1: Mission, Vision, and Educational Philosophy. In accordance with this vision and charter-relevant State Board of Education policy regarding high school graduation, Kauffman School leadership will determine specific graduation standards for the school.

Section A.9 (Education Plan: School Climate and Discipline)

Applicant Instructions

Describe the strategies the school will employ to develop and sustain a safe and orderly school climate that supports fulfillment of the educational goals. Explain the school's student behavior philosophy and discipline policy or code of conduct for both the general student population and for students with special needs. The full discipline policy should be included as an attachment if already developed.

Explain how the school will encourage family involvement and communication to support student learning, and how it will gauge satisfaction with school climate.

Evaluation Criteria

A response that meets the standard will

- *Describe an approach to student discipline that is reasonably likely to promote a safe and orderly learning environment; and*
- *Present legally sound policies for student discipline, suspension, dismissal and expulsion or a reasonable plan for their development; and*
- *Outline a clear strategy for engaging parents and guardians in the life and culture of the school; and*
- *Include evidence that the school will ensure a safe environment conducive to learning.*

Introduction

In addition to its role in providing a safe and orderly learning environment, school climate and culture will be deeply tied to academic success at the Kauffman School. Expectations regarding conduct will not stand merely as part of a school-wide discipline policy. Rather, all primary stakeholders in the school will be part of a common culture defined by a clear set of shared expectations and values. A system of recognizing positive behavior and intervening when students act inappropriately will be aligned to state standards and will serve as a key element in sustaining good conduct and reducing distractions. The Kauffman School will also seek to build a learning community distinguished by a collective understanding of how appropriate behavior and discourse drive both academic and personal achievement. There must be a strong school culture, verbally and visually imparted on a continuous basis, if the school and its students are to reach their full potentials. School leadership will fully develop and guide the school's culture, and the Kauffman School reserves the right to modify aspects of its climate and discipline plans with school board approval and appropriate sponsor engagement and/or approval.

School Culture

Research, school visits, and advice from charter school practitioners and experts all emphasize the vital importance of a strong culture as essential to school success. As one veteran school leader told the Kauffman School Design Team, the best curriculum on Earth won't make any difference in a school in which students are not engaged, teachers don't have high expectations, and the school spends its time on distractions rather than learning. By contrast, schools with incredibly strong cultures focused on rigorous teaching and learning can achieve

exceptional outcomes with even an average curriculum. Establishing a positive culture allows for great instruction, which is at the core of our program.

There are two aspects to culture: school-wide culture and classroom culture. School-wide culture refers to the norms and values shared by all students and adults in the school. Classroom culture refers to the expected behaviors in the classroom. For example, many high performing public schools across the country use common classroom management systems such as SLANT: Sit up, Listen, Ask questions, Nod, and Track classroom speakers with your eyes. In fact, it's quite common to see this acronym prominently posted in classrooms. In schools with strong cultures, all students are listening, following directions and on task at all times. All students are highly engaged in rigorous coursework. The entire school is focused with a sense of urgency on the development of its students and teachers. Teachers make each lesson relevant and engaging for students through research-based best practices. The entire school exhibits a sense of urgency regarding the development of its students and teachers.

The Kauffman School's founding school leadership team will define and develop the nuances of the school's culture. Some fundamental hallmarks already identified as likely elements of the Kauffman School's culture include:

- Visible and frequently communicated "school vocabulary" that establishes and reinforces the schools' culture – acronyms, special words and principles that are shared among students and adults
- School uniforms or other special clothing
 - Some schools differentiate uniforms between middle and high school
 - Others require students to "earn" their school t-shirts, which sometimes have different levels to indicate higher levels of academic and behavioral achievement
- Special incentive and reward systems
- A clearly defined and consistently implemented student discipline system
 - Disciplinary demerit systems
- School contracts or understandings signed by students and families indicating they are aware of the school's fundamental values, discipline policies, and expectations
- Family engagement strategies focused on student achievement
- Information meetings prior to enrollment to communicate and set expectations about the school with students and families

Building and Sustaining School Culture

Policy and Procedure: The Kauffman School will provide its primary stakeholders (students, teachers, and families) with comprehensive policy and procedure manuals outlining the school's academic and behavioral expectations. These documents will provide a static reference point regarding both classroom and school-wide conduct, including how recognition is formally bestowed on students exemplifying the school's expectations, and the intervention stages for those who are not. The cultural hallmarks established by the school leadership team will be clearly articulated in these documents, providing a guide for students, teachers, and families regarding the kinds of behavior valued at the Kauffman School and why those behaviors are critical to the academic and personal success of Kauffman students. The school's discipline policy will reflect the high expectations of the Kauffman School as well as the general conduct necessary for students to learn in the school's focused academic environment. An abridged sample Student and Family Handbook is included in Appendix A.9-1. The sample handbook

excerpt is by no means exhaustive, but is intended to demonstrate the Kauffman School's capacity to develop a full policy document once school leadership is hired. Materials from programs with philosophies and goals similar to those of the Kauffman School – KIPP and Excel Academy – served as templates for the sample policy document provided in Appendix A.9-1. Kauffman School leadership will develop the school's official student handbook during the start-up year. School leadership will utilize three main sources in developing the Kauffman School's policies:

- 1) Missouri statute provides clear direction regarding discipline policies (160.261, Rev. Stat. Mo.), the suspension or expulsion of students (167.161, 167.164, 167.171, Rev. Stat. Mo.), and statutory components of the Missouri Safe Schools Act. Kauffman School leadership will follow all applicable guidelines in state law regarding school discipline policies. The Kauffman School will make every effort to avoid removing students from school and limiting their learning time, but will base its most severe interventions on the guidelines provided in state law.
- 2) High-performing charter schools serving “high-risk” urban students from other states have provided their nationally recognized school culture models and policy documents for use as platforms on which the Kauffman School can build its own plans and manuals. These schools include the Academy of the Pacific Rim, Roxbury Preparatory Charter School, KIPP (Kansas City and St. Louis), and Excel Academy in Boston, MA. Several other schools have informally contributed guidance regarding school culture.
- 3) The Kauffman School Design Team will compile a charter school “Thought Book” and present it to Kauffman School leadership. The Thought Book will contain notes and recommendations on a variety of subjects (including school culture) from members of the Design Team based on their site visits, research, and experience. Included in this book will be required elements/platforms related to school culture and student policies, as well as suggested materials for leadership decisions.

Consistent Implementation: Kauffman School leadership will transmit the school's cultural hallmarks and imperatives to teachers and other staff through the policy manuals and direct communication. Teachers will then become the models and standard-bearers of the school's culture for students in their classrooms. Consistent implementation of the school's expectations, recognitions, and interventions are essential if the school's culture will be instilled throughout the student body. Students need to know what is expected, tolerated or forbidden in one classroom is also expected, tolerated and forbidden in all other classrooms or areas of the school. Systems will be established to provide a further layer of uniformity in standard school activities. For example, policies regarding passing periods, lunchroom organization, classroom bulletin board presentation, cleanliness, and time management will be non-negotiable aspects of every school day.

School leadership will evaluate and coach staff throughout the year on how consistently and effectively they are applying the school's expectations and policies. All schools have rules and regulations, but variation in how those policies are implemented in the classroom contributes to lack of order and focus among students. From issues as simple as gum-chewing or mobile phone texting to more serious disruptions like taunting or insubordination, all teachers will follow established school guidelines in addressing poor behavior. In high-performing charter schools across the country, this consistent and unwavering approach to establishing systems and enforcing shared values is critical to building a student population capable of high academic achievement.

Teachers and staff will be coached by the school's special education leader in how to hold special populations to the same high standards as other students, while acknowledging any unique issues a particular student may have. For students with special needs or who are learning English as a second language, individual or cohort protocols will be developed to ensure the students' best interests are maintained. In as many ways as possible, however, all students will share the same set of values and expectations throughout the school.

Curriculum Integration: Teachers at the Kauffman School will work with school leadership to determine the best ways to integrate key cultural hallmarks into the school's academic program and "life prep" curriculum. The school may utilize its FLASH course concept to conduct a one-week course each year, or mini-lessons throughout the year, on the Kauffman School itself. This course would help students understand the cultural values of the school, why those values are important to their ultimate success, and what the school means to them on a personal level. Formalizing the importance of school culture for students by examining it in a classroom setting will provide an opportunity for them to discuss it directly with teaching staff and lend it greater credibility as a school concept.

Family Engagement: The Kauffman School will work to provide focused and meaningful opportunities for families of enrolled students to engage with the school, particularly ways in which parents or guardians can contribute to the academic success of their children. School leadership will develop and implement a detailed family engagement strategy for the Kauffman School; however the following list contains several fundamental ways the school will seek to involve the families of its students:

- In the months leading up to the school's opening, regular family information fairs will be organized for both potential students and those already enrolled. These information fairs will provide an opportunity for school leadership to offer a candid view of the Kauffman School, its vision for students, and the commitment necessary from all key stakeholders to realize this vision.
- Individual family/student meetings with leadership and staff prior to the start of school where policies regarding behavior, attendance, promotion, and academic performance are discussed and an "agreement of understanding" is signed by the concerned parties. These meetings may take place at the school or in students' homes as appropriate or necessary.
- Regular personal communication between the school and students' families will be an essential activity of classroom teachers. In most successful schools, parents/guardians are personally contacted by a staff member every 4-6 weeks, providing an opportunity to talk about a student's successes and challenges on a regular basis.
- The Kauffman School will establish several information portals whereby families of students can receive regular updates on school-wide issues, events, and student recognition. The school will attempt to provide information through a variety of vehicles to accommodate the respective circumstances of its families. These modes of communication may include paper documents, e-mails, postings at the school, and key reminders in the regular phone calls to families.

- The school will hold regularly scheduled teacher conferences throughout the school year. Conference schedules will be established to reasonably accommodate the unique scheduling challenges of the school's families. The Year One Kauffman School calendar indicates six different conference periods throughout the extended school year, with both a weekday and a weekend day designated to accommodate varying family work schedules.
- Family volunteer opportunities at the school will be determined by school leadership, but will focus on ways to improve student achievement and strengthen the school's culture. An "open door" policy will mean any parent or guardian can schedule a meeting with school staff to discuss a student, or explore ways for them to be involved in the school. School leadership may work with families to establish a self-sustaining parent/family group to coordinate activities and communications among families at the school.

One of the Kauffman School's core goals involves a primary stakeholder satisfaction survey. This survey will be administered to students, families, and staff to gauge a variety of aspects at the Kauffman School, including school culture. The timeline and frequency of these surveys will be determined by school leadership, though they need to occur on at least an annual basis to meet school goals. The surveys will provide a fundamental way for parents/guardians to provide feedback directly to school leadership.

B. Organizational Plan

The Organizational Plan should provide an understanding of how the school will be operated, beginning with its governance and management. It should present a clear picture of the school's operating priorities, delegation of responsibilities, and relationships with key stakeholders.

B.1. Governing Body

B.2. Governing Board Composition

B.3. Management and Operation

B.3.1. Education Service Providers*

B.4. Staffing and Human Resources

B.4.1. Four-Year College And/Or University Affiliation*

B.5. Student Recruitment and Enrollment

B.6. Community Involvement

B.6.1. Joint Application*

*** Denotes Sections Required Only of Certain Applicants**

Section B.1 (Governing Body)

Applicant Instructions

Describe the entity that will hold the charter and be responsible for governing the school. Provide documentation of the entity's legal status including Articles of Incorporation, Bylaws, and documentation of legal not-for-profit status.

To the extent that the organization exists and has functions independent of the operation of the proposed school, provide a brief description of the organization, its history, its current operation, and the relationship between its existing operations and the proposed school.

Required Exhibits

- *Articles of Incorporation*
- *Corporate Bylaws*
- *Documentation that the applicant is a Missouri nonprofit corporation and has applied for and/or received not-for-profit status from the Internal Revenue Service.*
- *Documentation of criminal background checks for all prospective board members or assurance of satisfactory completion as a condition of service.*
- *Documentation of child abuse registry checks for all prospective board members or assurance of satisfactory completion as a condition of service.*

Evaluation Criteria

A response that meets the standard will

- *Present proper documentation that the entity proposing to hold the charter is a Missouri nonprofit corporation;*
- *Documentation of LEA status, if applicable, and*
- *In the case of pre-existing organizations, demonstrate that the operation of the proposed school is consistent with the organization's overall mission and operation.*

Required Exhibits

- *Articles of Incorporation (please see Appendix B.1-1)*
- *Corporate Bylaws (please see Appendix B.1-2)*
- *Documentation of Missouri nonprofit status (please see Appendix B.1-3)*
- *Documentation of IRS application for not-for-profit status (please see Appendix B.1-4)*
- *Documentation of criminal background and child abuse registry checks (please see Appendix B.1-5)*

Ewing Marion Kauffman School

The Ewing Marion Kauffman School is a Missouri nonprofit corporation created pursuant to R.S.Mo Section 355. The Kauffman School will operate as a "Local Educational Agency" (LEA) per approval of this application by the school's sponsoring institution and pursuant to R.S.Mo 160.405.6. The Kauffman School is currently in the process of applying for not-for-profit status from the Internal Revenue Service and has received preliminary approval (see Appendix B.1-4). The school's Federal 1023 application is currently in progress.

Ewing Marion Kauffman Foundation and Compliance

The Ewing Marion Kauffman School exists as a distinct incorporated entity from the Ewing Marion Kauffman Foundation. The Kauffman School's bylaws allow the Kauffman Foundation's President to appoint and remove the school's Board of Directors in an effort to ensure the school remains aligned to its mission, purpose, and principles. Moreover, the Foundation has a responsibility to oversee its significant contributions to the school, including use of its name and reputation, funds, and talent. The Kauffman School Board will abide by all state statutes regarding charter school governance, including applicable items contained in the following:

- 105.450 (conflict of interest, decision-making public servants)
- 105.483, 105.485, 105.487, 105.489 (financial disclosure)
- 160.400 (charter schools defined)
- 160.405 (charter application, operation, and oversight)
- 160.410 (admissions and public information)
- 160.420 (employment, contracts, and certification)
- 355, RSMo (nonprofit corporation)
- 355.326 (election of officers)
- 537.700 – 537.756 (MO public entity risk management fund)
- 610.010 – 610.035 (quasi-public govt. body, Sunshine Law)

Members of the Kauffman School Board of Directors will receive no compensation other than reimbursement of actual expenses incurred while fulfilling duties as a member of the board. No member of the board will hold any office or employment from the board, the Kauffman School, or the school's sponsor while serving as a governing board member. No member of the governing board will be an employee of a company that provides substantial fee-for-services to the charter school. The school will conduct criminal background and child abuse registry checks of all inaugural and future board members in compliance with R.S.Mo 160.400.11. Documentation indicating completion of criminal background and child abuse registry checks for current members of the Kauffman School Board of Directors is presented in Appendix B.1-5.

The Kauffman School reserves the right to legally modify its bylaws and relationship with the Kauffman School via due process, school board approval, and appropriate sponsor engagement and/or approval.

Section B.2 (Governing Board Composition)

Applicant Instructions

List the members of the proposed governing board including their names, current employment, and relevant experience or qualifications for serving on the board, including, but not limited to, their relationship to the community in which the school will be located.

For each proposed governing board member, the application should include, as an attachment, a resume or CV, and the completed form labeled Appendix 1: Request for Information from Prospective Charter School Board Members.

Describe any specific plans for recruitment of additional governing board members, including but not limited to, plans that would involve parental, professional educator or community involvement in the governance of the school.

Required Exhibits

- *Prospective Board Member Resumes or CVs*
- *Completed form labeled Appendix 1: Request for Information from Prospective charter School Board Members for all prospective board members.*

Evaluation Criteria

A response that meets the standard will indicate that the board

- *Has capacity to oversee the successful development and implementation of the education program presented in the application.*
- *Has capacity to oversee the effective and responsible management of public funds.*
- *Has capacity to oversee and be responsible for the school's compliance with its legal obligations.*
- *Will represent the community well.*
- *Is aware of their duties and responsibilities as public servants in accordance with RSMo 105.450.*
- *Will generally have the capacity to found and sustain a quality school.*

Introduction

The Kauffman School's inaugural Board of Directors was assembled based on the relevant skill sets and experiences of its members, their commitment to maintaining the philosophy and focus of the school on student outcomes, and their established commitment to the Kansas City community. Kauffman School board members are aware of their legal responsibilities and have ample capacity to found and sustain a quality charter public school in Kansas City.

Required Exhibits

- CV and Request for Information from Prospective School Board Member, Jorge Cadenas (please see Appendix B.2-1)
- CV and Request for Information from Prospective School Board Member, R. Stephen Green (please see Appendix B.2-2)
- CV and Request for Information from Prospective School Board Member, Aaron North (please see Appendix B.2-3)
- CV and Request for Information from Prospective School Board Member, Munro Richardson (please see Appendix B.2-4)

The Kauffman School Board

The primary roles of the Kauffman School's Board of Directors will be to set school policies, approve and monitor an annual operating budget, hire and hold school leadership accountable, oversee progress toward key goals, and vote as appropriate to fulfill its duties. The members of the Kauffman School Board of Directors listed in the following sections possess a wealth of experience in nonprofit leadership and governance. Members of the board have direct professional practice with public school finance, nonprofit and education law, charter school board participation, as well as a distinguished record of service in the Kansas City community.

Current board members are aware of their legal obligations as charter public school board members and future members will receive a legal overview during the recruiting process. The Kauffman School's Board of Directors understands that charter schools are legally defined as Missouri nonprofit corporations and their boards must abide by the state's provisions regarding nonprofit governance. In addition, Missouri's charter school law also designates directors as "decision-making public servants" who must file annual ethics and financial reports. Charter school boards are "quasi-public governmental bodies" under Missouri law and must adhere to the state's open meetings and records law – commonly referred to as the "Sunshine Law." For a list of statutory references related to these duties, please refer to Section B.1: Governing Body.

The list below includes some of the basic implications of state statute and the Sunshine Law for the Kauffman School Board. These items take effect once the school's charter application is approved by the Department of Elementary and Secondary Education (DESE):

- Meetings are open to the public and must be publicly announced
- Most records and documentation are public
- Closed meetings and records are allowed in some limited circumstances
- Officers must be elected by the board
- All board members must have a criminal background and child abuse registry check
- Board members must sign a conflict of interest statement declaring they are not employees of the charter school or of an entity contracted by the school to provide products or services
- Board members must make annual public financial disclosures
- The charter board is subject to the same liability for acts in office as if it were a duly elected school board or any other public school district in the state
- The board must have appropriate liability insurance
- The board may vote to amend the school's charter with approval of the sponsoring institution

The Kauffman School Board will start small to allow for focused decision-making and discussion during the school's start-up and early operational phases. The four inaugural members will recruit colleagues, community leaders, parents/guardians of potential students, and Kauffman Associates to serve on non-voting committees intended to help the school start as strong as possible. The board's bylaws permit increased membership, and the board will work with the Kauffman Foundation to determine an appropriate time and method for identification and recruitment of new board candidates in the months following sponsor and state approval. The Kauffman School anticipates recruiting at least one additional inaugural board member during the summer of 2010. A short description of the inaugural Board of Directors for the Kauffman School is presented below.

Jorge Cadenas

Jorge Cadenas is the head of the Finance Division for ExamOne, a Quest Diagnostics subsidiary which is a \$300MM company. His primary responsibilities are to support the profitable growth of the business and ensure accuracy of the financial reporting. Jorge has over 15 years of financial, management and consulting experience. Prior to his current role with Quest, he was with Hallmark Cards, Inc. for over eight years, where he held various financial leadership roles including his last position with the Retail – Gold Crown division as Finance

Manager. Prior to that, Jorge was residing in the Washington, DC area (where he was born and raised) working with KPMG Consulting (now BearingPoint) as a Senior Consultant of Education & Nonprofit services. As a child from parents who fled Cuba as young teens, Jorge is passionate about the right to a fair opportunity. It begins with an opportunity for all regardless of race, creed, or economic status to attain a quality education. In this vein, he feels fortunate to currently serve on the Board of Directors with Kauffman Scholars, Inc. While attending George Mason University until his graduation, he worked as a tutor and mentor for “at-risk” youth in the Early Identification Program. Jorge believes all youth should have access to a high quality of education and he is dedicating his efforts to assist in achieving this goal. He lives in Overland Park, KS with his wife and has three children.

Please see Appendix B.2-1 for Jorge Cadenas’ CV and “Request for Information from Prospective Charter School Board Members” form.

Dr. R. Stephen Green

R. Stephen Green is President and CEO of Kauffman Scholars, Inc., a comprehensive college preparatory and scholarship program designed to significantly increase the number of college graduates from Greater Kansas City’s urban schools. Previously, Green was the superintendent of Community School District 28 and a local instructional superintendent in Region Three for the New York City Board of Education. He has also served as president and executive director of the New Jersey Teaching and Learning Collaborative; national executive director of the College Ed Program for the College Board; assistant superintendent for the Metropolitan School District of Lawrence Township in Indiana; teacher and professor of English literature at the high school and university levels; and director of minority student affairs at Butler University. Dr. Green has charter school board experience with University Academy and Academie Lafayette, both located in Kansas City, MO.

Please see Appendix B.2-2 for Dr. R. Stephen Green’s CV and “Request for Information from Prospective Charter School Board Members” form.

Aaron North

As an independent consultant, Aaron North worked with the Kauffman Foundation’s School Design Team in the development of the Ewing Marion Kauffman School model. North served as the founding Executive Director of the Missouri Charter Public School Association (MCPSA) from October 2006 – June 2009. Prior to leading the start-up effort at MCPSA, North worked in Minnesota as a charter school sponsor, charter school resource center director, and in the Minnesota Department of Education’s Office of Choice and Innovation. He also served as Board Secretary for an urban elementary charter school in Minneapolis. North taught high school English in rural North Carolina as a Teach for America corps member and worked for Andersen Consulting and Sprint PCS prior to his teaching experience. North is a graduate of the University of Kansas and the University of Minnesota’s Humphrey Institute of Public Affairs. North believes all students and families should have access to high quality public education options and his current efforts are dedicated to that end. North is a resident of Kansas City, MO.

Please see Appendix B.2-3 for Aaron North’s CV and “Request for Information from Prospective Charter School Board Members” form.

Munro Richardson

Munro Richardson is Vice President of Education at the Ewing Marion Kauffman Foundation. Richardson is responsible for the development and supervision of the Foundation's strategic investments in K-12 education and youth entrepreneurship. Richardson assisted with development of several major education programs, including Kauffman Scholars and the Foundation's math and science education initiative. Previously, he served as deputy director of Kauffman Scholars, Inc. during its demanding startup phase to guide the program's administration, operations, and finances.

Richardson is a graduate of Lincoln College Preparatory Academy in Kansas City, MO. At the post-secondary level, he graduated Phi Beta Kappa from the University of Kansas where he received a B.A. in East Asian Languages and Cultures (highest distinction); an M.A. in East Asian Studies from Harvard University as an Andrew W. Mellon Fellow; an M.Phil. in International Relations from Oxford University as a Rhodes Scholar; and currently is a Ph.D. candidate in political science at the University of Illinois at Urbana-Champaign. He lives in Kansas City, MO with his wife and three daughters.

Please see Appendix B.2-4 for Munro Richardson's CV and "Request for Information from Prospective Charter School Board Members" form.

Section B.3 (Management and Operation)

Applicant Instructions

Describe the organizational structure of the school and its day-to-day operation. Explain the management roles and responsibilities of key administrators with respect to instructional leadership, curriculum development and implementation, personnel decisions, budgeting, financial management, legal compliance, and any special staffing needs.

Your response should describe the primary responsibilities for each key management position and should identify critical skills or experience that will be priorities for fulfillment of those responsibilities. Give particular attention to the roles, responsibilities, and actual (if already identified) or desired qualifications of the school leader. Discuss any plans for recruiting or selection of the school leader if not already identified.

Required Exhibits

- *Organizational Chart that shows the staffing structure and reporting responsibilities for the board, administration, and staff.*
- *Key position descriptions including critical skills or experience of every employee that they intend to hire based on the organization chart (description can be general for core teachers). Qualifications for hiring should provide assurance that background checks and child abuse registry will be conducted for every employee in accordance with the law.*

Evaluation Criteria

A response that meets the standard will include

- *Clear delineation of the roles and responsibilities for administering the day-to-day activities of the school;*
- *Demonstrated understanding of management needs and priorities; and*
- *A staffing plan that appears viable and adequate for effective implementation of the proposed educational program.*

Introduction

Great charter schools are filled with people who are deeply committed to the school's mission, educational philosophy and operating procedures. Practitioners, researchers and experts all agree that finding the right people starts with having the right leadership in place. The best philosophy, strategy, and curriculum will not produce desired student outcomes if the right people are not in the school. The Kauffman School approach is to provide a platform of research, expectations, and measures – presented in this document – and then find the best possible leadership team to build the school on top of that platform.

This section addresses the important role of leadership in the development of the charter school, and the desired experience and qualifications of the Kauffman School's founding leadership team. In addition, high level descriptions of key staffing positions anticipated for Years One through Three are provided. The Kauffman School reserves the right to modify aspects of its management model and anticipated staff roles with school board approval and appropriate sponsor engagement and/or approval.

Required Exhibits

- Year One Kauffman School Organizational Chart (please see Appendix B.3-1)
- Executive Director Position Description (please see Appendix B.3-2)
- Director of Curriculum and Instruction Position Description (please see Appendix B.3-3)

Basic Organizational Structure

As presented in the Year One Organizational Chart provided in this application (see Appendix B.3-1), the Kauffman School Board of Directors will serve as the primary governing authority over the school. The board will monitor the school's adherence to the philosophy and approach outlined in this application, track progress toward academic and non-academic goals, ensure ethical operations within established budgetary parameters, and evaluate the effectiveness of the school's Executive Director. The Executive Director reports directly to the board and will make reports on all critical aspects of the school at regularly scheduled board meetings. All school-wide administrative staff report to the Executive Director. The Kauffman School's staffing overview reflects its priority to dedicate as many resources as possible to student achievement. Allowing instructional leadership and staff the opportunity to dedicate their time and attention to student learning also undergirds decisions regarding administrative staff. More detailed information regarding administrative positions is provided below.

Leadership Team Approach and Growth Plan

Similar to the Kauffman Foundation's findings regarding high growth entrepreneurial firms and the Kauffman Design Team's analysis of high-performing charter schools around the country, the single heroic leader at the helm of a successful school is more myth than reality. Strong schools typically have at least two key leadership roles—instruction and operations. High performing schools not only excel at curriculum and instruction, but also have effective structures and systems so that adults and students are not distracted from the primary focus—student achievement.

Successful charter school models such as Achievement First and Uncommon Schools divide these roles into two positions—the instructional leader and the operations leader. The former focuses on curriculum and instruction. She or he oversees the development and implementation of curriculum, high quality instruction, the professional development of teachers and assessment procedures to improve instruction. The latter focuses on school structures (organization of people and time) and systems (accountability, feedback, data and compliance). Together, these leaders build a shared school-wide culture and enable teachers to create exemplary instruction which focuses on engagement and achievement, both defined by mission-driven high expectations and coherence between all school activities.

In the Kauffman School model, the Executive Director embodies the responsibilities of the operations leader at the organizational level, but also serves as the chief administrator and the standard-bearer of the school's philosophy and vision. The Director of Curriculum and Instruction is responsible for all academic-related activities at the school and reports to the Executive Director. The two positions work closely together to ensure all academic and non-academic functions are working in concert to produce the best possible learning environment for students. The Kauffman Foundation will support the Executive Director as appropriate to ensure the school adequately establishes its systems and procedures in the first year, particularly in areas of financial management and business administration. This support may take the form of consulting resources or direct technical assistance.

The leadership plan for the Kauffman School model has four phases once the school is operational. In Phase One, a founding leadership team will create an outstanding middle school. This means they will have a strong hand in building the fundamental structure, systems and culture that will shape the entire 5-12 model. They will build that foundation with a small student body for the school's first two years allowing them to focus closely on details and determine the most effective approaches. Phase Two begins with the introduction of a second middle school unit in Year Three, and a new incoming fifth grade class of seventy-five students. A second DCI will be hired to lead the academic program at the second middle school unit and will also report directly to the Executive Director. Phases Three and Four comprise the high school program's early years (beginning in Year Five when a third DCI is hired for grades 9-12) and the maturation of the school to full enrollment.

Phase One (Fall 2011-Spring 2013)

The first phase comprises start-up of school operations in Years One and Two. The Kauffman School consists of a single middle school campus with an ED and a DCI.

Phase Two (Fall 2013-Spring 2015)

The second phase comprises the growth to two middle schools in Years Three and Four. The second middle school comes online in Year Three with its initial fifth grade class. A DCI at the second campus is hired and reports to the Executive Director.

Phase Three (Fall 2015-Spring 2017)

The third phase is the continued growth of the middle schools and start-up of the high school in Years Five and Six. A DCI for the high school is hired and reports to the Executive Director.

Phase Four (Fall 2017-)

The fourth phase is the maturation of the middle and high school campuses beginning in Year Seven, with the 5-12 charter school reaching its maximum enrollment target of approximately 1,000 students in Year Ten (Fall 2020). This phase is distinguished by the Kauffman School's first graduating class in 2019.

Leadership Recruitment

The Kauffman School will hire a two-person leadership team in 2010 – approximately one full year prior to the start of school. Recruiting efforts began in early 2010 for an Executive Director (ED) and a Director of Curriculum and Instruction (DCI). An external school leadership search firm, Koya Consulting LLC, was retained in early 2010 to facilitate and manage the Kauffman School's recruiting effort. The search is national in scope and accesses both formal and informal public education networks in an effort to generate the best possible talent pool. Currently, the Kauffman School is reviewing final candidates and plans to hire its school leaders contingent upon approval of this application by its sponsor and subsequently by DESE. The Kauffman School is committed to finding the best possible ED and DCI to manage start-up activities in the pre-operational year, fully develop the school's curriculum, and create the policies and procedures necessary for the school to start as strong as possible for the students and families it serves. More detailed information regarding start-up year activities for the school's leadership team can be found in Section C.6: Pre-Opening Plan. The work represented in this application serves as a strong platform on which school leadership will fully develop the school.

Executive Director

The Executive Director is responsible for the overall start-up, administration, and management of the Kauffman School, including school philosophy, school design, staffing, operations, and culture. The Executive Director will be charged with founding and directing a high-performing urban charter school unrelentingly focused on student achievement.

Areas of responsibility include board relations, policy development, staff and organization evaluation, fiscal management, and outreach to internal and external stakeholders. All administrative positions at the school will report to the Executive Director. Please see Appendix B.3-2 for a copy of the Executive Director Position Announcement, which includes an overview of duties and desired qualifications. The Executive Director will be responsible for activities associated with the Director of Operations position in the first two years of school operation. The Kauffman Foundation will support the Executive Director to ensure the school adequately establishes its systems and procedures in the first year, particularly in areas of financial management and business administration. This support may take the form of consulting resources or direct technical assistance. Kauffman's funding to the school and assistance with facilities acquisition will allow the Executive Director more time to focus on fiscal and operational issues than would normally be possible in the first two years of operation.

Director of Curriculum and Instruction

The Director of Curriculum and Instruction is responsible for the success of the academic program at the Kauffman School. Areas of responsibility include curriculum development and refinement, scope and sequence, student assessment, performance data processing and integration, professional development, and management and evaluation of instructional staff. The Director of Curriculum and Instruction will report to the Executive Director. Please see Appendix B.3-3 for a copy of the Director of Curriculum and Instruction Position Announcement, which includes an overview of duties and desired qualifications.

Descriptions for Administrative and Support Staff Positions (Years One through Three)

PLEASE NOTE: All staff, contracted service personnel, and volunteers working in direct contact with students will be subject to criminal and child abuse registry background checks.

Director of Operations: At full capacity, the Kauffman School will employ two Directors of Operations – one at the middle school level and one at the high school level. The first Director of Operations will be hired in Year Three, when the school adds its second incoming cohort of fifth graders. The Director of Operations will be responsible for the day-to-day finances, reporting, and non-academic operations at the school. The Director of Operations will be responsible for the maintenance and security of confidential student and employee records, as well as ensuring the school complies with requisite Core Data reporting requirements as set forth by DESE. The Director of Operations will report to the Executive Director. The Executive Director will be responsible for activities associated with the Director of Operations position in the first two years of school operation. Professional services are budgeted to help the Executive Director with business and finance activities in the school's early years.

School Performance Manager: Beginning in Year One, a School Performance Manager will be hired to collect, process, and report on all student and Kauffman School data – with a focus on academic assessment information. The School Performance Manager will work closely with the Directors of Curriculum and Instruction at each school unit to tailor information appropriately for staff development in addition to academic program evaluation. The School Performance Manager reports to the Executive Director and may also assist with required state reporting procedures prior to Year Three.

Director of Special Education: At full capacity, the Kauffman School will employ two Directors of Special Education – one at the middle school level and one at the high school level. The first Director of Special Education will be hired in Year One. Anticipated responsibilities for this position include coordinating identification, assessments, Individual Education Plan (IEP) creation, monitoring, aligned professional development, code/legal compliance, and facilitation of models like RTI. The Directors of Special Education report to the Executive Director.

College Prep Coordinator: Beginning in Year Two, the Kauffman School will hire a College Prep Coordinator to oversee all activities in both the middle and high school related to college readiness. College Guidance Counselors at the high school level will report to the College Prep Coordinator. This position will be responsible for arranging college visits, providing curriculum and training related to college entrance exams, build relationships with state and national post-secondary institutions, and coordinate Advanced Placement activities. The College Prep Coordinator reports to the Executive Director and will be a half-time position in Year Two due to

the relatively small student enrollment at the first middle school unit. The position becomes full-time in Year Three.

School Counselor. Beginning in Year One, the Kauffman School will employ its first School Counselor, ultimately hiring one such position at each of the charter's three units. The School Counselors will support students and staff in areas concerning social work, mental health, general well-being, and other personal guidance not directly related to college preparedness. School Counselors will have credentials and experience in areas related to social work and personal counseling services. Distinguishing school counseling from college preparation activities will allow personnel working in each area to focus on their respective areas of expertise, rather than attempting to combine all traditional guidance counseling activities in a single position.

English Language Learner Coordinator. At full enrollment, the Kauffman School anticipates employing three ELL Coordinators – one at each middle school unit and one at the high school level. Hiring decisions will be based on enrollment of ELL students. The Kauffman School is currently estimating ELL enrollment as ten percent of the overall student body for revenue purposes, but is taking a conservative approach to staffing the school even though the school plans to initiate significant marketing activities in areas of the district with higher concentrations of households where English is spoken as a second language. The ELL Coordinator staffing model could accommodate more than twenty percent ELL enrollment. The ELL Coordinators' will lead identification and support activities for ELL students and work with teachers to develop appropriate instructional techniques, curriculum modifications, viable assessments, and provide classroom assistance for identified students. The ELL Coordinators will report to their school unit's Director of Curriculum and Instruction.

Executive Assistant. Beginning in Year One, the Kauffman School will employ an Executive Assistant (EA) at the organizational level to provide general clerical support to administrative personnel and serve as the school's first point of direct contact with external stakeholders (primarily student and families). The EA will report to the Executive Director and will manage incoming communications, absence reporting, school visits, and office organization among other duties.

School Nurse. Because enrollment changes relatively quickly over the school's first five years of operation, the Kauffman School is budgeting for school nursing functions in the "Contracted Services" section of its initial financial model. School leadership may determine it is necessary to hire a permanent school nurse position, however many charter and district schools share nursing resources by contracting for services from companies or individuals with appropriate certification, credentialing, and background check clearance. The Kauffman School nursing services will provide basic care and screenings to students as appropriate, work with counselors on issues of abuse, neglect and malnutrition, and provide necessary training to staff in matters of student health or emergency aid.

School Security. In order to ensure appropriate funding is allocated for security services, the Kauffman School includes a baseline designated cost for building security at \$0.40 per square foot in its facilities financial model. In Years One through Four, the Kauffman School budget provides approximately \$19,000 each year for school security monitoring (within the facilities assumption). After the start of Year Five, the Kauffman School budget allocates approximately \$52,000 each year for security monitoring (based on the estimated increase in space requirements). In addition, several hundred thousand dollars are allocated through the school's first five years for security personnel and contracted human resources. These numbers can be

adjusted by school leadership to reflect the needs of the school for both static security (alarms, cameras, etc) and personal security (contracted or hired human resources). The purpose of school security is to provide a safe learning environment for students, staff, and visitors inside and outside the school. Personal security may include, but not be limited to, patrolling the building and grounds, assisting with student pick-up/drop-off procedures, visitor escorts, emergency planning (evacuations / severe weather), and basic first aid services. Individuals providing security services will be appropriately trained and certified in addition to the requisite criminal and abuse registry background checks.

Custodial Services: The Kauffman School will contract for custodial services to provide a safe and sanitary education environment for students. Custodial staff will perform general maintenance, landscaping, snow-removal, and cleaning services. Custodial contracting is budgeted in both “Contracted Services” and in the estimated facilities calculation. Custodial personnel will be subject to the same criminal background and child abuse registry checks as all other staff.

Instructional Staff

Kauffman School leadership will develop detailed job descriptions for all instructional staff, including classroom teachers, apprentice teachers, and classroom aides. Based on observations of highly effective charter schools across the country, the Kauffman School anticipates hiring teachers who believe all children can learn at a high level and are willing to do “whatever it takes” to help students reach their potentials. General expectations regarding instructional staff are included in Section B.4: Staffing and Human Resources. All staff and volunteers in direct contact with students will be subject to criminal and child abuse registry background checks.

Section B.3.1 (Education Service Providers)

This section is not applicable to this application.

Section B.4 (Staffing and Human Resources)

Applicant Instructions

Discuss the staffing plan for the term of the charter including anticipated staffing needs and recruitment strategies. Discuss how the plan supports sound operation and successful implementation of the school’s educational program.

Describe the instructional skills, experience, and development that teachers will need to have in order to be successful. How are those needs reflected in the plan for teacher recruitment?

Include a draft of a Staff Handbook or Employment Manual if developed. In responding to this section, consider the following questions:

- *What strategies does the school have for recruiting and retaining effective teachers?*
- *How do the staffing-related budget assumptions align with educational program needs?*
- *How does the staffing plan reflect the anticipated enrollment and growth of the school?*

- *How will the school determine appropriate experience, training and skills of non-certified instructional personnel?*
- *What will be the employer-employee relationship for staff at the school?*

Evaluation Criteria

A response that meets the standard will

- *Present strategies for recruiting and retaining effective teachers that are realistic and reasonably likely to be effective;*
- *Demonstrate a sound understanding of staffing needs that are aligned with the budget and with the school's anticipated enrollment;*
- *Demonstrate a sound understanding of staffing needs with respect to successful implementation of the educational program; and*
- *Present a plan that is reasonably likely to attract and retain effective staff.*

Instructional Staff

The Kauffman's School's staffing plan reflects its priority to dedicate as many resources as possible to student achievement. Allowing instructional leadership and staff the opportunity to dedicate their time and attention to student learning also undergirds decisions regarding administrative staff – when the school is fully enrolled staffing is relatively light in the front office to keep appropriate resources in the classrooms. School leadership will determine the specific characteristics and qualifications for instructional staff, but assumptions based on the school's design and practices in highly effective national charter school models are included here. School leadership will also be responsible for recruiting and retaining instructional staff, however general expectations regarding recruitment and retention are outlined in this section. The Kauffman School reserves the right to modify aspects of its staffing and human resources approach with school board approval and appropriate sponsor engagement and/or approval.

Staffing Plan Assumptions

The belief that all children can learn if given the opportunity is fundamental to the Kauffman School model. A school providing that opportunity must have appropriate staff in place to speed up early academic growth for students entering the school behind their peers, as well as to challenge and inspire students as they prepare for college and life. The ten-year staffing/enrollment summary attached in Appendix B.4-1 presents a picture of what the Kauffman School will need to fulfill its mission for students. This model is aligned with the school's ten-year budget projections (see Appendix C.1-4) and reflects committed financial support from the Ewing Marion Kauffman Foundation critical to appropriately staffing the school.

The Kauffman School anticipates class sizes of twenty to twenty-five students at both the middle and high school levels. These moderately sized classrooms will allow teachers to appropriately differentiate instruction without limiting the number of students they reach. The overall student-to-teacher ratio of just over 20-to-1 is consistent with this expectation. At the school's fifth and sixth grades, additional teaching staff is provided for English and mathematics courses. These additional teachers will be appropriately certified and will serve as additional supports to teachers and students in the critical "catch-up" phase at the school's earliest grades.

Administrative staffing is intended to allow instructional staff the ability to focus as much of their time and energy as possible on achievement in their classrooms. Counseling positions with social work qualifications are provided at all school units. These positions will work with students who may have non-academic barriers to learning (i.e. victims of abuse or neglect, poor health care, anxiety, depression, etc). College guidance positions are also budgeted at the middle and high school levels and will focus on issues related to successful college preparation and completion. Special Education and English Language Learner staff will ensure the school is meeting the needs of its special populations in accordance with state and federal law. College, Special Education, and English Language Learner administrators will work closely with classroom teachers to implement necessary accommodations for specific students and provide professional development training in their respective areas of expertise. The Executive Director and Directors of Curriculum and Instruction will be expected to observe teachers frequently and provide actionable feedback to improve instruction and classroom management. The Directors of Operation will allow other administrative staff the opportunity to spend more time engaged in student learning activities by managing daily finances, reporting, human resources, and other operational requirements.

For more detailed information regarding administrative staff (including position overviews), please see Section B.3: Management and Operation.

Expected Qualities of Instructional Staff

School leadership will determine specific criteria for hiring instructional staff, including core classroom teachers, world language instructors, and enrichment personnel (PE, Art, and Music). The Kauffman School model, however, suggests some teacher qualifications and qualities that are non-negotiable. These characteristics of classroom teachers were also observed in the high-performing charter schools visited by the Kauffman School Design Team. The following list contains expected qualities of Kauffman School instructional staff:

- Believe all children can learn if given the opportunity
- Demonstrate passion for (and experience in) urban education and a willingness to do “whatever it takes” to help students achieve
- Willing to work longer hours and more school days than traditional public school teachers
- Use data to inform necessary changes to curriculum or instructional approach
- Strive to meet clear and measurable academic goals for students
- Believe in the Kauffman School philosophy and possess an ability to conduct their classrooms in a manner consistent with school-wide culture and expectations
- Create a variety of approaches to keep children engaged and keep them in the classroom when disciplinary action is appropriate
- Open to working in an organization where performance and demonstrated commitment to student success are the most highly valued (and compensated) professional qualities
- Appropriately certified based on state requirements

Recruiting Effective Teachers and Staff

The Kauffman School has several ways in which it can recruit the best possible teachers and administrative staff. The following list contains the networks and avenues by which high quality candidates can learn about opportunities at the Kauffman School:

- Public posting of positions through local media (including media serving the city's diverse minority populations)
- Advertising in national trade publications such as Education Week
- Identify high performing teachers through personal contacts and referrals in city and suburban districts
- Outreach to non-traditional teaching networks such as the Teach for America alumni network and the American Board for Certification of Teacher Excellence
- Publicize positions in local and state colleges and universities
- Adopt techniques used by organizations already recruiting high quality teachers (i.e. KIPP, The New Teacher Project, Uncommon Schools, Achievement First, etc)
- Utilize social media and employment websites
- Leverage personal contacts and networks of Kauffman School leadership and Kauffman Foundation associates
- Access local and national teacher recruitment organizations, such as the American Board for Certification of Teacher Excellence (ABCTE) and the New Teacher Project.

Attracting and Retaining Effective Staff

The Kauffman School will demand much of its teachers. The Kauffman Foundation will work with school leadership to identify ways to attract quality teaching candidates, but also to strategize ways to retain effective teachers and avoid the "burnout" experienced by high performing schools across the country. The Kauffman Foundation is committed to researching best practices and piloting programs which will lead to staff retention. The following list presents some of the ideas currently being explored by the Kauffman School Design Team for discussion with school leadership regarding retention of the school's best teachers:

- Provide financial incentives tied to both performance and responsibilities (the Kauffman School's budget already reflects an average teacher salary of approximately \$51,000 based on extended day and year)
- Promote mentorship and consistent feedback for less experienced teachers, and the opportunity to become a mentor or lead teacher to veteran teachers
- Make relevant professional development and collaborative endeavors hallmarks of the school model
- Allow teachers to move between teaching and administrative positions every few years to avoid burnout and to provide an opportunity to learn new skills
- Make allowances for teacher sabbaticals or extended leaves of absence to work or learn in other effective schools across the country
- Foster an environment of professionalism and respect between administrative and instructional staff

- Spontaneously recognize, reward, and show appreciation for staff – teacher “outings” to restaurants, hosting a bowling party, or a surprise picnic on days when students may not be in school are ways effective schools try to engender a “family” atmosphere among staff

Certification and Non-certified Personnel

The Kauffman School will comply with all teacher certification requirements for charter schools as set forth by the State of Missouri. Full and/or part-time staff employed by the Kauffman School to provide services to students with disabilities will possess all certification requirements in accordance with state and federal law. All staff, contract workers, and volunteers in direct contact with students will be subject to criminal and child abuse registry background checks.

The Kauffman School may employ noncertified instructional staff provided that no more than twenty percent of the instructional FTE at the school are filled by noncertified personnel. All noncertified personnel will be supervised by certified instructional personnel when leading classroom activities and will be selected based on their subject matter expertise and/or community leadership role in promoting a particular subject or characteristic.

FLASH Facilitators: The Kauffman School envisions community experts in non-traditional school subjects facilitating a portion of its FLASH courses. Areas where community experts may be called upon include finance, journalism, art, web development, astronomy, politics, theatre, and a host of other topics. FLASH experts will conduct their courses under the supervision of certified staff and will undergo all appropriate background checks. Detailed criteria for FLASH instruction will be determined by school leadership, however it is assumed FLASH resources will have deep expertise in topics relevant to Kauffman students and demonstrate an ability to engage students in meaningful learning. FLASH facilitators will be recruited through recommendations made by instructional staff, school leadership, the Board of Directors, or Kauffman Foundation Associates.

The Kauffman School will not employ instructional personnel whose certificate of license to teach has been revoked or is currently suspended by the state board of education.

Employment Policies

The Kauffman School Design Team has compiled sample manuals from high-performing schools with similar academic programs and expected student outcomes (i.e. Excel Academy, Academy of the Pacific Rim, KIPP, and Roxbury Prep). These policy manuals will be provided to school leadership in addition to support in crafting appropriate school-wide policies. An abridged sample Personnel Policies document is included in Appendix B.4-2. The sample policy document is by no means exhaustive, but is intended to demonstrate the Kauffman School’s capacity to develop a full policy document once school leadership is hired. Materials from programs with philosophies and goals similar to those of the Kauffman School – KIPP and Excel Academy – served as templates and sources of language and direction for the sample policy document provided in Appendix B.4-2. Kauffman School leadership will develop the school’s official personnel policies during the start-up year.

Section B.4.1 (Four-Year College and/or University Affiliation)

This section is not applicable to this application.

Section B.5 (Organizational Plan: Student Recruitment and Enrollment)

Applicant Instructions

In the table provided, enter enrollment projections for the school, by year, for the first five years of operation.

Describe the plan for recruitment and enrollment of students. Explain how the school will be publicized and marketed throughout the community to a broad cross-section of families with prospective students. What strategies will you use to reach families that are traditionally less informed about educational options?

Include an explanation and evidence to support the enrollment projections. Relevant evidence may include, among other things, the following:

- *Community demographic information (numbers of potential students);*
- *Documentation of community or family demand for the proposed school such as letter of intent to enroll; and*
- *Enrollment data from schools currently operating in the community.*

Describe the proposed enrollment process and provide assurances that the charter school will comply with the requirements of section 160.410, Rev. Stat. Mo.

If the charter school intends to establish admissions preferences based on a geographical area around the school, sibling enrollment in the school, parent employment at the school, or – in the case of a workplace charter – parent employment in the business district or business site of the school, provide a clear description of the proposed preference and how it will apply in the event that capacity is insufficient to enroll all pupils who submit a timely application.

Evaluation Criteria

A response that meets the standard will

- *Include an outreach and recruitment plan that demonstrates understanding of the community to be served and is likely to be effective including for families traditionally less informed about educational options;*
- *Present enrollment projections that are supported by evidence of actual or potential demand; and*
- *Include enrollment and admissions policies and plans that comply with the requirements of section 160.410.*

Introduction

The Kauffman School is a fully public charter school, free and open to all students residing within the Kansas City, Missouri School District (KCMSD) boundaries. In its effort to provide a high quality college preparatory program to the most under-served children in Kansas City, the Kauffman School will focus its recruiting efforts on students meeting one or more “high-risk” criteria as defined in R.S.Mo 160.405.2(4), paying particular attention to students who are “. . . at least one year behind in satisfactory completion of course work . . . limited English proficiency . . . eligible for free or reduced-price school lunch.” The Kauffman School reserves the right to modify aspects of its recruiting and enrollment plans with school board approval and appropriate sponsor engagement and/or approval.

Enrollment Projections

The school's projected enrollment for years one through ten are provided in the application cover sheet table, and presented with more detail in Appendix B.5-1. The Kauffman School will start small and grow responsibly as it refines the systems, curriculum, and culture necessary to realize its overall vision for students. In the initial year, the school will enroll seventy-five fifth graders, comprised of three classes of twenty-five students. There is no evidence of a charter school achieving the results the Kauffman School intends to reach with an enrollment of more than 120 students in its first year – that is one reason the school will start very small. It is also imperative the Kauffman School get as much right as possible in its first year of operations, as the vast majority of charter experts and successful operators contend that first year success is more attainable with a moderately small student enrollment.

The Kauffman School will add one grade level each year following Year One, ultimately offering grades five through twelve. In order to maintain a small school environment while still reaching as many students as possible, the school will grow into three distinct units – two three-hundred student middle school units (seventy-five students each in grades 5-8) and a four-hundred student high school unit (accounting for estimated retention rates). The Kauffman School will enroll its second cohort of 75 fifth graders in its third year – essentially creating a second middle school unit within the overall charter with a distinct identity from the first middle school unit, but sharing resources, best practices, and staff to maximize services to students. The enrollment table reflects the shift from 75 incoming fifth graders to 150 in Year Three. The Kauffman School will be configured to serve about 1,000 students in grades five through twelve when it is fully enrolled in Year Ten. The Kauffman School will graduate its first senior class of approximately forty-five students in 2018-19, with a full graduating class of ninety-seven in 2020-21 and beyond. Based on the experiences of local and national charter schools, the Kauffman School is setting an estimated annual attrition rate of 15% in Years One through Five, declining to an annual attrition rate of 10% in the sixth year. The Kauffman School will “backfill” open seats up to the seventy-five student level per grade through the eighth grade in each middle school unit, and will utilize an incoming assessment for new students to place them in the appropriate grade where they will be able to master content and adequately prepare for the following grade. The Kauffman School will not socially promote students.

The average enrollment in Kansas City charters is 427 students, ranging from a low of 126 to a high of 1,254.⁶ The Kauffman School will be one of the larger charter schools operating in Kansas City, but is configured to maintain the benefits of a small school climate even as overall

⁶ Based on September 2009-10 enrollment data provided by DESE.

enrollment grows. An analysis of education and population trends within the Kansas City, Missouri School District boundaries presents five zip codes covering the central and eastern portions of the district with high numbers of school-age children living in areas where statutorily defined “high-risk” factors may be more prevalent (particularly household income level and performance of district/charter public schools). In order to ensure the school continues to serve its target population over time and in accordance with R.S.Mo 160.410.2(1), the Kauffman School will provide a geographical enrollment preference to students living in the 64123, 64124, 64127, 64128, and 64130 zip codes. The school plans to locate its permanent facilities within the enrollment preference area, though it may need to utilize a temporary facility outside the area during its initial operational period. The Kauffman School will focus its recruiting efforts in these areas as well. The performance of both charter and district public schools in these areas is generally poor, with the exception of the Lincoln College Preparatory magnet school which selectively enrolls students based on academic acumen. There is a need for the kind of fully public, rigorous college preparatory program offered by the Kauffman School. Informing the thousands of families in these under-served areas of the district about what the Kauffman School can offer them will be an ongoing priority of the school’s leadership team and board.

Student Recruitment

The Ewing Marion Kauffman Foundation has decades of experience working in the Kansas City community. It is one of the most recognized organizations in the metro area, and the Kauffman School will build its own information and marketing campaign on the long-established relationships and brand identity of the Kauffman Foundation. The most intensive outreach efforts will take place in areas of the district where there is the highest likelihood of reaching students meeting one or more “high-risk” factors defined in R.S.Mo 160.405.2(4), particularly students who are, “at least one year behind in satisfactory completion of course work . . . limited English proficiency . . . eligible for free or reduced-price school lunch.”

In addition to traditional marketing vehicles available to leadership (newspaper ads, signs, and radio spots), the Kauffman School will also utilize “evangelical” marketing techniques—street-level conversations with families and businesses, information distribution at local events and places where people regularly gather (community fairs, places of worship, barber and beauty shops, libraries, etc), frequent informational meetings at public venues in the target neighborhoods, and a sensitivity to the unique circumstances of working parents/guardians in attending or participating in recruitment activities. The Kauffman School will also develop an online resource for families where they can learn more about the school and submit enrollment documentation. Materials will also be translated and distributed in areas with large numbers of people speaking English as a second language to ensure all students have an opportunity to learn about and enroll in the school.

Kauffman Scholars, Inc. (KSI), an after and summer school program designed to prepare students residing in low-income households for college success, serves students in grades seven through twelve. The Kauffman School will work with KSI to recruit age-appropriate siblings of current KSI scholars, many of whom live in areas of the district where the Kauffman School will focus its recruiting efforts. In addition, the Foundation’s network in other parts of the district can be utilized to reach additional families interested in a high quality college preparatory program.

Enrollment Process

As a charter public school, the Kauffman School cannot selectively admit students based on academic aptitude, race, ethnicity, income level, special education needs, prior school record, or almost any other personal characteristic. The school will be required to take students on a first come first serve basis. In the event there are more applications than seats, the school will use a lottery to give every applicant an equal chance of admission per R.S.Mo 160.410.

The school will create an enrollment period (e.g., thirty days) in early 2011 and set the maximum number of students it is prepared to enroll at a particular grade level (seventy-five fifth graders). If, by the end of the thirty-day enrollment period, the maximum capacity is not reached, all students submitting enrollment forms are admitted into the school. If maximum capacity is exceeded, all students who enrolled during the thirty-day period are assigned numbers and are randomly selected for admittance. Students who are not selected, or students who submit enrollment forms outside the thirty-day window, are placed on a waiting list and are randomly selected as seats become available at their grade level. Students receiving geographical enrollment preference, who have siblings already attending the Kauffman School, or whose parents/guardians work at the school will receive priority in the enrollment process and lottery procedures by being admitted through enrollment or lottery first. Students who do not have a statutorily approved enrollment preference (R.S.Mo 160.410.2) will then be admitted through enrollment or a secondary lottery based on the process described above.

Section B.6 (Organizational Plan: Community Involvement)

Applicant Instructions

Discuss your plans for community involvement in the governance and operation of the school. Describe the nature of potential partnerships including examples of how community partners will play an integral part in the life of the school and identify specific organizations with which the school is already working, or likely to partner.

Describe your plans for developing community partnerships and any specific steps you have already taken. Include in your response relevant documentation such as letters of support or commitments to provide or share resources.

Evaluation Criteria

A response that meets the standard will

- *Present a vision and strategy for community involvement that is reasonably likely to further the school's mission and program; and*
- *Provide evidence that anticipated partnerships are realistic and achievable.*

Introduction

The Kauffman School community consists of both internal stakeholders (students, families, staff, and board) and external stakeholders (community leaders, politicians, businesses, and service groups). Students are the most critical stakeholder group and the school's effectiveness in preparing them for success in life after high school will always be the priority.

The Kauffman School will build on the relationships of associates within the Ewing Marion Kauffman Foundation to develop community understanding of and involvement in the Kauffman School. With an opening slated for 2011, the Kauffman School will begin its community outreach efforts in 2010 to lay the best possible groundwork for the school's ongoing success in the community. The Kauffman School reserves the right to modify aspects of its community outreach plans with school board approval and appropriate sponsor engagement and/or approval.

The Kauffman Foundation

The Kauffman School is uniquely positioned regarding community relationships because of its direct affiliation with the Ewing Marion Kauffman Foundation. The Kauffman Foundation has had a relationship with nearly every major education endeavor in Kansas City for the past two decades. In recent years, the foundation worked with the local school district to bring Teach for America to Kansas City, while also working with the Knowledge is Power Program (KIPP) to open a KIPP charter school. The Kauffman Foundation also supports Kauffman Scholars, Freedom Schools, First Robotics and LEGO League teams, Cristo Rey Network, Expeditionary Learning Outward Bound Schools, Project Lead the Way, and a host of other programs and organizations working in education throughout Kansas City. The Kauffman School will not rely solely on the Kauffman Foundation to establish its identity and reputation within the city. The extensive personal contacts Foundation Associates have with policy-makers, business leaders, community activists, religious figures, educators, and families in the district will be utilized early to enhance the school's ability to forge its own brand and place within the community. A formal letter of support from the Kauffman Foundation is presented in Appendix C.1-3.

Community Involvement Strategy (2010)

The following list comprises issues and items for consideration in the development of a 2010 Communications and Outreach Plan. Kauffman Associates will assist in the strategy and details encompassed within the plan.

- General purpose statement in early community outreach – what we hope to accomplish through community engagement
- List of key external community stakeholders to reach in 2010
 - Develop a timeline for contacting them based on priority and relationships to target communities
 - Understand existing connections with Kauffman Associates
- Types of community groups to consider in outreach plan
 - Parents/guardians of prospective students
 - Religious groups and churches
 - Political leaders
 - Nonprofit and health service providers
 - Local business leaders
 - Neighborhood associations and press
 - Groups with whom the Kauffman Foundation has an existing relationship
 - Missouri Charter Public School Association (MCPSA)
 - Charter school board presidents (individual schools)

- Outreach Packet with materials and information to be shared by Kauffman Associates with community contacts
 - Appropriate explanation for why Kauffman is making students with statutorily defined “high-risk” factors a priority
 - Explanation of planned community involvement, partnerships, or relationships in the governance and operation of the school
 - Description of school design and program for public distribution
- Coordinated timeline outlining when community stakeholders are contacted and when public communications to the media regarding the school are released
- Protocols for media interactions
 - Establish a point-person for questions or requests from the media
- Protocols for public inquiries
 - If a parent/guardian calls the Kauffman Foundation and asks to talk with someone about the charter school, to whom are they referred, what information is immediately provided, and what system is in place for recording appropriate information about interested individuals?
- Develop a 2010 press release schedule based on anticipated milestones in the school’s development:
 - Sponsor Application Submission
 - State Application Proposal
 - State Application Approval
 - Leadership Hire
 - School Site Selection
 - Enrollment Window / General update and description (late 2010)
 - Family/Community Information Fair (to be held in January 2011)
- Develop “press packet” with school overview information, general timeline of events, and appropriate contacts for inquiries that can be easily distributed to media
- Methods for notifying public of board meetings pending charter approval in 2010
- Identification of services to provide multi-lingual versions of all important Kauffman School documentation and messaging
- Website Development Phase One: Information
 - School design details and pertinent timelines

Community Involvement Strategy (2011)

The following items will likely be part of the Communications and Outreach Plan for 2011. School leadership will play the most critical role in implementing this plan, but the Kauffman Foundation should help lay the groundwork for it throughout 2010 based on outreach efforts already underway and a general understanding of what communications will be required during the months leading up to opening.

- School marketing activities
- Enrollment window announcement, lottery explanation, and waiting list procedures
- Family/Community Information Fairs (monthly from January – June)
- Website Development Phase Two: Interaction
 - Online school enrollment form
 - Schedule and RSVP function for information fairs
- Parent/guardian interaction strategy finalized and implemented
- School opening announcement
- Family expectations and school explanation meetings for families of enrolled students

Section B.6.1 (Education Service Providers)

This section is not applicable to this application.

C. Business Plan

The Business Plan should provide an understanding of how the applicants intend to develop and manage the school's infrastructure and finances. It should present a clear picture of the school's revenue projections; expenditure requirements; facilities needs; transportation and food service plans; and pre-opening plan.

- C.1. Budget**
- C.2. Financial Management**
- C.3. Facility**
- C.4. Transportation**
- C.5. Insurance**
- C.6. Pre-Opening Plan**

Section C.1 (Budget)

Applicant Instructions

Use the Charter School Budget Template (Appendix B) to detail the school's estimated revenues and expenditures for the proposed term of the charter including the pre-operational start-up year.

Provide a cash flow analysis for the first fiscal year of operation (July 1-June 30)

Include explanation and discussion of key budget assumptions underlying the budget projections and explain how the budget aligns with and supports implementation of the educational program. If the school anticipates incurring debt for any reason, such as for acquisition of its facility, the budget must address the schedule for debt repayment and the budget discussion should elaborate on the repayment assumptions and plan.

Discuss the school's contingency plans for cash flow challenges, a budget shortfall, lower than expected student enrollment or other financial challenges in the early years of operation.

Required Exhibits

- *Budget for the proposed charter term*
- *Opening year cash flow analysis*

Evaluation Criteria

A response that meets the standard will

- *Present budget priorities that are consistent with and support key parts of the plan, including the school's mission, educational program, staffing and facility.*
- *Present realistic, evidence-based revenue and expenditure assumptions, including for any plan to incur and repay debt;*
- *Present viable strategies for meeting potential budget and cash flow challenges, particularly for the first year of operation; and*
- *Demonstrate a commitment to maintaining the financial viability of the school.*

Introduction

The Kauffman School budget is distinguished by the level of due diligence exercised in its creation, its alignment to school programming, and critical support from the Ewing Marion Kauffman Foundation. School leadership will have an opportunity to review and revise elements of the budget once they are hired, but the version presented in this application accurately represents current expected revenues and expenses over the school's first five years of operation. A ten-year budget forecast is also included to demonstrate the school's financial self-sustainability following its seventh year of operation.

Exhibits and Statements

- Please see Appendix C.1-1 for the Kauffman School Budget Template.
- Please see Appendix C.1-2 for the opening year Kauffman School Cash Flow Analysis.
- Please see Appendix C.1-3 for the Kauffman Foundation Letter of Support
- Please see Appendix C.1-4 for the Kauffman School Ten-Year Budget Forecast

- The Kauffman School reserves the right to modify aspects of its budget and financial model with school board approval and appropriate sponsor engagement and/or approval.

Budget Development

The Kauffman School budget was developed with a series of inputs from local, state, and national experts in charter school finance. The following individuals and organizations played key roles in developing the realistic, evidence-based revenue and expenditure assumptions exhibited in both the Budget Template and Ten-Year Budget Forecast included in this application:

- Abacus Charter School Consulting – CEO Michael Buerger worked directly with the Kauffman Design Team members to construct a detailed financial model extending to the school’s fifteenth year of operation. Mr. Buerger’s previous experience includes three years as Chief Financial Officer for the KIPP Foundation.
- Missouri Department of Elementary and Secondary Education – With assistance from Jocelyn Strand, members of the Kauffman School Design Team and Abacus Charter School Consulting associates met with key DESE administrators working in public school finance in Jefferson City on October 1, 2009. The anticipated six percent decrease in basic formula dollars over the next eighteen months that is included in the financial model is based on guidance from DESE. DESE associates with whom the team met include:
 - Debra Clink, School Finance/Transportation Consultant
 - Dr. Roger Dorson, Coordinator, School Administrative Services
 - Debbie Gerlette, Supervisor, Special Education Funds Management
(The team spoke with Ms. Gerlette via phone due to a scheduling conflict the day of the other meetings.)
 - Jennifer Jordan, Assistant Director, School Finance
 - Pat Kaiser, Director, Financial Management
 - Kelly Kempker, Supervisor, Federal Grants Management
 - Jocelyn Strand, Director, A+ Schools/Charter Schools
 - John Weber, Director, School Improvement Technical Assistance
 - Karen Wooton, Director, School Food Services
- Missouri Charter Public School Association (MCPSA) – Shannon Spradling, MCPSA’s Chief Administrative Officer, met with Kauffman Design Team members several times between October, 2009 and March, 2010 to review the school’s financial model and continues to offer guidance. Shannon has nearly two decades experience working with public school finance and charter schools, particularly in Kansas City, MO.
- Kauffman Design Team – Jamie Rice, a Senior Financial Analyst at the Kauffman Foundation, served as the school’s primary point-person in collecting, analyzing, and tracking input from the external experts listed above.

Alignment with School Programming

A guiding principle throughout the school development process was to put as many dollars as possible directly into the classroom. The budget included in this application exhibits a heavy commitment to teaching and support staff. Extra teaching staff for English and Mathematics at

the fifth and sixth grade levels is included, as are administrative positions for English Language Learning and Special Education. Student-teacher ratios are kept at a reasonable level to access the benefits of smaller class sizes, and relatively substantial resources are dedicated to FLASH courses and extracurricular activities in order to provide students with exposure to a broad range of opportunities outside the traditional classroom environment.

Support from the Ewing Marion Kauffman Foundation

The Ewing Marion Kauffman Foundation is committing \$10 million over ten years to provide critical start-up and early operational support to the Kauffman School. Based on the current financial model, the Kauffman School will become wholly sustainable on public funding following its seventh year of operation, making the necessary Kauffman Foundation commitment approximately \$8.2 million over eight years (including the start-up year). The difference between the Foundation's commitment and the estimated amount budgeted over the school's first ten years (approx. \$1.8 million) will serve as a contingency resource to compensate for any changes in public funding or other unforeseen circumstances. A letter outlining the foundation's support and anticipated financial commitment is provided in Appendix C.1-3.

The financial philosophy undergirding the development of the Kauffman School's financial model includes four basic concepts:

1. Keep dollars as close to students as possible (i.e. in the classroom)
2. Exhibit good stewardship of state and federal funds
3. Build partnerships to reduce costs during start-up phase
4. Ensure the school is financially sustainable on public funds within the first ten years

In order to start the school as strong as possible and begin making significant academic gains with students from day one, Kauffman Foundation dollars will be used to hire appropriate staff, provide adequate classroom amenities, and allow school leadership to focus on the business of educating students and not perpetual fundraising. Ultimately, the school will be financially sustainable based on the strength of its operations and management of state and federal revenues. Current internal projections show the school will achieve a positive annual fund balance sustained exclusively through state/federal funding following Year Seven and will remain solvent in subsequent years without Kauffman Foundation financial support. This is reflected in the absence of Kauffman Foundation funding from the "local revenues" category in the Ten-Year Budget Forecast presented in Appendix C.1.4. The school's fund balance in Years One through Seven with Kauffman Foundation support is between three percent and five percent of expenditures annually. The Kauffman Foundation is committed to the success of the Kauffman School and may provide contingency assistance if current financial modeling proves inaccurate during the school's operational phase. In addition, professional services are budgeted to help the Executive Director with business and finance activities in the school's early years.

Key Revenue Assumptions

The Kauffman School is taking a conservative, yet reasonable, approach to its revenue assumptions. Funding assumptions are based on discussions with DESE and analysis of data collected by that agency, information provided by operating Missouri charter schools, and discussions with MCPA. Additionally, consideration of enrollment target areas established the

baseline assumptions for WADA calculations. Key revenue drivers with short explanations are listed below.

- Per Pupil Funding
 - The primary drivers of pupil funding include the state basic foundation formula funding, federal title funding, and local “Proposition C” funding (after Year One of operations). Funding rates are based on recent guidance from DESE and MCPSA.
 - The Kauffman School is planning for a six percent decrease in basic foundation formula funding between June 2010 and June 2011. Revenue assumptions are based on this decreased funding amount relative to basic foundation formula funding in early 2010.
- WADA Calculations
 - WADA is driven by school calendar and the demographic profile of enrolled students
 - Kauffman school calendar includes 30 mandatory days of summer school for all students with 7 instructional hours each day
 - Based on data of local public schools (district and charter), and an analysis of census tract data within the district, the Kauffman School assumes the following demographic profile
 - 80% Free/reduced lunch
 - 10 % Limited English Proficient
 - Staffing model prepares for potentially higher enrollment percentage.
 - 10% Special Education
- Transportation Funding
 - Estimate 20% state reimbursement of costs
 - Based on information received from local charter schools, bus company quote, and Debra Clink at DESE
 - For more information, please see section C.4: Transportation

Key Expenditure Assumptions

Expenditure assumptions are primarily based on the Kauffman School’s mission, model, and desired outcomes. Information from other charter schools (both inside and outside the state), facilities guidance from the Illinois Facilities Fund (IFF), and research by Abacus Charter School Consultants helped shape the estimated expenses in the budget included with this application. As with revenues, the Kauffman School is taking a conservative, yet reasonable, approach to its expenditure assumptions. Key assumptions are described below.

- Salaries/Benefits
 - Kansas City district and charter salary averages were used to establish a baseline
 - Extended school calendar drives approx. 15% salary increase over baseline
 - Extra teaching staff for English and Mathematics at the fifth and sixth grade levels is included in all years, as are administrative positions for English Language Learning and Special Education

- Facilities
 - Assumes a rental scenario in temporary space for first ten years
 - Assumes dramatic expansion of space needs in Year Five
 - Assume \$12.50 per square foot facilities cost
 - Estimated square footage cost derived from research with IFF and analysis of the charter school market
- Transportation
 - Route rates based on feedback from Kansas City charter schools of similar size serving same anticipated student population and estimate provided by local bus company
 - Transportation costs are included for summer school (without state reimbursement)
 - Assume the school will cover 80% of transportation costs, with 20% being reimbursed by the state
- Food Service
 - Cost per meal estimate based on enrollment projections, anticipated student demographics, and participation rates as provided by area charter schools
 - Per meal cost estimates based on conversations with food service consultant as well as area district and charter public schools (e.g. breakfast = \$1.93; lunch = \$2.91; snack = \$0.51).
 - Estimated federal reimbursements per meal for free, reduced, and ineligible students collected from the National School Lunch Program and School Breakfast Program (e.g. free breakfast = \$1.46; free lunch = \$2.68; free snack = \$0.74)
 - Modest student lunch fees are also calculated in the food service revenue model for “reduced” and “ineligible” student lunches
- Extracurricular / FLASH
 - Commitment to engaging students in broad range of learning opportunities through extracurricular clubs and FLASH courses
 - College trips and other preparatory activities are included in this budget item

Contingency Planning

The Kauffman School's primary focus in planning for financial contingencies related to low enrollment, changing demographics, or other financial challenges is to protect academic programming. The school will work to prevent unexpected financial challenges by staying informed of state and national policy changes, tracking enrollment closely, seeking guidance regarding potential special education costs, establishing a line of credit in the school's start-up year, and performing proper governance oversight via monthly financial reports to the school's board of directors.

In the event a serious shift in anticipated revenues or expenditures occurs, school leadership may elect to take one or more of the following courses of action:

- Identify area(s) causing the budget shift and attempt to adjust
- Monitor and identify, in real time, material shifts in budgeted revenues and expenditures and take swift corrective actions to mitigate budgetary impact
- Review service contracts for possible cost-savings with alternate providers
- Adjust staffing to reflect a higher student-teacher ratio

- Modify expectations regarding extracurricular activities
- Access school's line of credit to help with minor cash flow disruptions
- Request a change in the level of support from the Kauffman Foundation

Section C.2 (Financial Management)

Applicant Instructions

Describe the systems and procedures for managing the school's finances and identify the staff position(s) that will be responsible for financial oversight and management. Describe how the school's finances will be managed and who will be responsible for the protection of student and financial records. Your response should address, among other things, the school's plans in the following areas:

- *Provisions for an annual audit consistent with its LEA status;*
- *Development and dissemination of annual financial report; and*
- *Providing recommended liability insurance to indemnify the school, its board, its staff and teachers against tort claims.*

Evaluation Criteria

A response that meets the standard will

- *Demonstrate understanding of the school's financial management obligations;*
- *Present evidence that the school is prepared to adhere to generally accepted accounting practices and the Missouri Financial Accounting Manual;*
- *Present evidence that the school has or has capacity to develop adequate policies and processes for tracking enrollment and attendance eligibility, eligibility for free and reduced priced lunch, special education and limited English proficient enrollment; and*
- *Demonstrate preparation to meet its insurance, annual audit, annual financial report and other key financial management obligations.*

Financial Management and Oversight

Financial management and oversight at the Kauffman School will be performed as part of a coordinated effort between the Executive Director, the Director of Operations (beginning in Year Three), and the Board of Directors. The Executive Director is responsible for presenting financial reports – including monthly balance sheets, budget-to-actuals, and cash flow analysis – to the Board of Directors at regularly scheduled meetings. In addition, the Executive Director will oversee the school's business and financial activities led by the two Directors of Operations (one at the middle school level and one at the high school level). The Board of Directors will evaluate financial reports, take voting action as necessary in financial matters, and hold the Executive Director accountable for operating within the annual budget. Professional services are budgeted to help the Executive Director with business and finance activities and to ensure the school adequately establishes its systems and procedures, particularly in areas of financial management and business administration.

At full capacity, the Kauffman School will employ two Directors of Operations – one at the middle school level and one at the high school level. The Director of Operations will be responsible for the day-to-day finances, reporting, facilities management, and other non-

academic operations at the school. In addition, they will attend school finance training provided by DESE, the local Regional Professional Development Center (RPDC), and the Missouri Association of School Business Officials (MOASBO) to ensure the school is in compliance with all the reporting requirements prescribed in the Missouri Financial Accounting Manual and up to date on the latest requirements and practices. The Kauffman School will adhere to generally accepted accounting practices and has already started that process through its interactions with DESE staff, Abacus Charter School Consulting, and the Missouri Charter Public School Association.

Kauffman School leadership, in conjunction with the Board of Directors, will develop internal control policies to address compliance with laws, segregation of duties, conflicts of interest, signature authorities, government access to records, accounting procedures, cash management, budget development, financial reporting, and property management and procurement. The Kauffman School reserves the right to modify aspects of its financial management approach with school board approval and appropriate sponsor engagement and/or approval.

Tracking and Data Reporting

The Executive Director will work with the School Performance Manager in Years One and Two to determine and fulfill specific duties and responsibilities regarding student data and records. The Director of Operations will be responsible for the maintenance and security of confidential student, employee, and financial records beginning in Year Three. He or she will also be charged with ensuring the school complies with requisite Core Data reporting requirements as set forth by DESE. As school enrollment grows, the Director of Operations will manage school aides in the processing and reporting of student data.

The Kauffman School will purchase a computer-based student information system (SIS) compatible with DESE Core Data reporting parameters. Packages such as Infinite Campus, PowerSchool, and AP Software Services are potential options that can integrate student data – such as free/reduced lunch status, special needs designation, English Language Learner status, and attendance – to financial reporting systems. School leadership will make the final decision regarding which SIS option is best suited to the Kauffman School's needs during the pre-operational year.

Accounting Services, Reporting, and Insurance

The Kauffman School will purchase services as necessary in order to comply with state statute regarding its financial practices and business operations. The following list provides some of the areas where purchased services will help the Kauffman School meet its statutory and fiduciary obligations.

Accounting Services: The Kauffman School will contract with a reputable third-party accountant to assist in producing necessary reports, preparing for its annual audit, submitting its Annual Secretary of the Board Report, drafting and documenting internal control policies and procedures, etc. One example of such a firm with a strong record among charter schools is Westbrook and Company PC, though school leadership and the Board of Directors will choose the firm most appropriate for the Kauffman School.

Accounting System: A computer-based accounting system – such as Software Unlimited or Financial Edge – is necessary to produce financial reports and link student information to school finances. The Kauffman School will procure an accounting system that is compatible with both its SIS package and state reporting requirements.

Annual Financial Report: The Kauffman School will work with its Accounting Services provider to produce an annual financial report based on audited financial statements. The Kauffman School will make its annual report available to the public via the internet.

Annual Audit: As an LEA, the Kauffman School will meet the requirements imposed by the Elementary and Secondary Education Act regarding annual financial audits (R.S.Mo 160.405.5). The Kauffman School will contract with a reputable, independent financial firm to conduct its annual audit. One example of such a firm with a strong record among charter schools is Daniel Jones and Associates, though school leadership and the Board of Directors will choose the firm most appropriate for the Kauffman School. The financial audit will comply with state board of education rule, 5 CSR 30-4.030.

Annual Secretary of the Board Report: Pursuant to charter school statute and R.S.Mo 162.821, the Kauffman School will produce an Annual Secretary of the Board Report in compliance with DESE procedures and protocols.

Liability and Employee Theft Insurance: Pursuant to R.S.Mo 160.405.13(2), the Kauffman School will purchase an insurance policy covering all employees in the amount of \$500,000 or more to provide coverage in the event of employee theft. The Kauffman School has received information and quotes from CharterSafe Insurance regarding such a policy. Please see Section C.5: Insurance for more information regarding procurement of all necessary liability insurance at the school.

Section C.3 (Facility)

Applicant Instructions

Discuss the school's facility needs based on the educational program and anticipated enrollment. If the applicants have identified a facility, indicate the location (street address, city, and zip code) and provide either floor plans or a description including, at a minimum, the number and size of the classrooms, common areas, administrative areas, recreational space, any community facilities, and any residential facilities. Explain how the facility will meet the needs of students and provide an assurance that it will be accessible to student with physical disabilities.

To the extent that the school has discussed or established a specific lease or purchase terms, include discussion of the proposed terms and any draft agreements. If the school intends to lease facilities from a school district, pursuant to section 160.405.9, discuss the status of those plans and provide evidence of any district commitments.

To the extent that the facility will require renovation or 'build out,' describe those plans including anticipated timing and cost.

If the school anticipates incurring debt as part of its facilities acquisition plan, the budget must include a repayment plan, as indicated in the Budget section, above.

If a facility has not been selected, specify potential locations that are under consideration and discuss the process and timeline for selecting, acquiring, renovating (if appropriate) and taking occupancy of a suitable facility.

Evaluation Criteria

A response that meets the standard will

- *Reflect a sound understanding of facilities needs;*
- *Demonstrate knowledge of facilities costs including, as applicable, cost of purchasing, leasing, building, or renovating an educational facility that conforms to applicable health, safety, and occupancy requirements;*
- *Present evidence to support facilities-related budget assumptions;*
- *Include evidence that the proposed facility will be adequate or present a plan for securing a facility that is appropriate and adequate for the school's educational program, anticipated location, and target population; and*
- *Demonstrate that the school's plan for acquisition of a facility is financially viable.*

Introduction

At the time of this application, the Kauffman School has not identified a facility for its first year of operations nor entered into any agreements related to the purchase or lease of a specific facility. The Kauffman School Design Team has worked closely with the Illinois Facilities Fund (IFF) since September, 2009 to determine the best facilities options for the school based on its programming, anticipated population, and philosophy. The Kauffman School assumes it will access a temporary facility during the school's first two to three years – possibly co-locating its two distinct middle school units. When the high school unit opens with its first ninth grade class in Year Five, the Kauffman School hopes to have a permanent facility for its 5-12 program within the geographical preference area defined in Sections A.5 and B.5.

A guiding principle for the Kauffman School in its facilities planning is to let the school model determine the facilities needed. Too often charter schools find themselves modifying their programs or enrollment models based on available building space, changing their school models to fit a particular building. IFF has been a like-minded partner in this approach to facilities planning.

Although the Kauffman School has not identified specific facilities for its 2011 opening, this section outlines the steps taken to this point, current facilities assumptions based on the school's program and population, and an anticipated timeline for securing appropriate accommodations for the school.

About IFF

The short description below is provided because of the important advisory and research role IFF plays regarding the Kauffman School's facilities planning process. A short description of their work and credentials clearly demonstrates their capacity to continue assisting the Kauffman School Design Team in its facilities planning and acquisition work.

IFF has significant experience in lending and real estate consulting to nonprofits, including charter schools, across Illinois, Indiana, Iowa, Missouri, and Wisconsin. IFF has made more than 700 loans to nonprofit organizations, consulted on over 200 real estate projects, and conducted research in the areas of child care, education, and nonprofit financial health since its inception in 1988. The IFF's experience working with charter schools and the particular challenges they face led to the creation of the Charter School Capital Program (CSCP) which brings together below-market rate loans and alternative credit-enhanced financing structures for schools. Through CSCP, the IFF has provided consulting and financing to more than 40 charter schools, including schools in Kansas City, and continues to work closely with the National Association of Charter School Authorizers, regional statewide Charter School Associations, Chicago Public Schools, and the Illinois State Board of Education.

Research and Planning

The Kauffman School Design Team began facilities planning and research in the summer of 2009. Early timelines were developed based on a 2011 opening, and IFF was identified as the organization best equipped to assist in more detailed planning activities. IFF worked with Kauffman associates to understand the Kauffman School model and its expectations. A high-level analysis of the Kansas City market was presented, as were common pitfalls associated with charter school facilities searches and ways to avoid them. In meetings held later in the year with the Kauffman Design Team, IFF helped establish negotiable and non-negotiable facilities parameters and amenities based on the school's academic program, student population, and overall vision for the school. The current needs assessment is based on those discussions in late 2009 and early 2010.

Current Needs Assessment

The Kauffman School has determined the following basic needs for its initial facilities based on the research described above:

- A total of 47,000 square feet for Years One through Four – accommodating up to 450 students in grades five through eight
 - This may be a temporary facility in Years One through Four
- A total of 129,000 square feet for Years Five through school maturity – accommodating approximately 1,061 students in grades five through twelve.
- School units may be co-located in the same facility, or spread among multiple buildings located in close proximity
- Key considerations in first phase of facilities search include:
 - Safe and secure environment
 - Classrooms approx. 1,000 sq. ft. each (accommodate class size of 25 comfortably, or slightly more if necessary)
 - Safe and secure outdoor recreational space
 - Busing lanes, safe drop-off and pedestrian areas for families, adequate parking for staff
 - Adequate parking for staff and visitors

- Regular and efficient catering accommodations for school meals
- Appropriate space for priority extracurricular activities (like FIRST Robotics science labs)
- Designated areas for special needs and counseling services
- Mixed use space for cafeteria and gatherings

Timeline

Currently the Kauffman School is working with IFF and a local Kansas City broker with public school real estate experience. The school is identifying an architect familiar with appropriate codes and zoning requirements. The Kauffman School hopes to find an initial facility by the fall of 2010. Necessary renovations and improvements will begin by the end of the 2010 calendar year, and occupancy will be possible in early-mid 2011. School leadership will be involved as much as possible in facilities decisions, but in order to ensure appropriate space is identified and secured in a timely fashion, the Kauffman School Board of Directors will hold primary responsibility in the facilities search and acquisition phase.

Budget Alignment

The current Kauffman School budget presented in Appendix C.1-1 reflects a facilities lease scenario as a baseline assumption. Although facility costs as a percentage of total revenue fluctuates dramatically over time, the average share of facilities to total revenues for the Kauffman School is approximately 15%. This figure is in line with other Missouri charter schools, where facilities costs range from 7% - 27% of total revenues. IFF and Abacus Charter School Consulting have helped the school develop models for a variety of lease and ownership scenarios; however until a decision regarding facilities is made by the Kauffman School Board of Directors, the lease option is the most practical for budgeting and forecasting purposes.

The financial model assumes a \$12.50 per square foot cost, which covers lease, maintenance, and general fees. This amount could cover a financing payment if an acquisition or extensive leasehold improvement option is pursued. Availability, price, and the level of leasehold improvements will dictate any other costs that may be incurred. The model also factors in an inflationary factor of two percent to reflect an annual increase in facilities expenses. The school will notify its sponsor and present updated budget information and a repayment plan if incurring debt as part of the facilities acquisition plan becomes necessary.

Section C.4 (Transportation)

Applicant Instructions

State whether the school intends to provide transportation for students. If so, describe the transportation plan and explain budget revenue and expenditure assumptions including those related to anticipated state aid pursuant to section 163.161 R.S.Mo.

If the school intends to contract with the local district or any other third party for transportation services, discuss the status of those plans and provide evidence of the third party's readiness and terms for providing those services.

Evaluation Criteria

If the applicants have elected to provide transportation, a response that meets the standard will

- *Present a thorough, realistic, and cost-effective transportation plan; and*
- *Provide specific evidence of third party readiness and terms for providing transportation services consistent with the school's budget assumptions. Third party must collect required information (include in application).*

Transportation Plan

The Kauffman School plans to provide transportation to students pursuant to R.S.Mo 167.231. School leadership will be responsible for determining the final transportation plan in cooperation with the contracted service provider – including number of stops, policies and procedures, and bus scheduling – but current assumptions suggest the school will provide transportation to students living more than one mile from the school's location. Although state statute mandates transportation be provided to students living more than 3.5 miles from the school if a charter school elects to provide busing, the Kauffman School transportation policy is more aligned to that of KCMSD and other local charter schools. State transportation aid is provided for schools transporting students at the one mile threshold. The Kauffman School reserves the right to modify aspects of its transportation plan with school board approval, appropriate sponsor engagement and/or approval, and due reporting to DESE if funding allocations are affected.

Budget Alignment

The Kauffman School conservatively anticipates state reimbursement covering 20% of the school's transportation costs. This percentage is in alignment with other Kansas City charter schools, and also reflects input from DESE finance staff. Budget assumptions related to transportation are derived from several key sources:

- R.S.Mo 163.161 regarding transportation aid to pupils
- A meeting with Debra Clink, School Finance and Transportation Consultant at DESE
- Discussions with local charter schools serving similar populations or providing similar programming – KIPP: Endeavor and Academie Lafayette
- Estimates from Durham School Services – the nation's second largest student transportation provider and a provider to several Kansas City charter schools
 - The quotes provided for bus transportation for Kauffman students were as follows: a dedicated bus for the school, whereas it is not "paired" with another school, costs \$250 per day per bus.
 - The service is only from home-to-school and school-to-home and serves only the Kansas City, Missouri School District areas.
 - Summer service would be at the same rate, though state transportation aid is not provided for summer school programs.
 - Children are normally not on the bus for more than one hour.
 - Durham provides certificate of liability insurance.
 - The buses normally carry 65 passengers (3 to a seat) but the transportation model for the Kauffman School assumes approximately 50 riders per bus to reduce time on the bus and make pickup scheduling as efficient as possible.
 - The lower bus capacity is the same for high school and middle school.

- The Kauffman School financial model reflects the \$250 rate and 50 students per bus.

Section C.5 (Business Plan: Insurance)

Applicant Instructions

Provide evidence of ability and preparation to obtain liability insurance coverage (minimum A-BEST rating) in the following areas:

- *Directors' and Officers' Liability*
- *Commercial General Comprehensive Liability that also expressly covers corporal punishment and athletic participation*
- *Educator's Legal Liability*
- *Employment Practices Liability*
- *Sexual Abuse Liability (separate policy or a separate part of general comprehensive insurance with independent limits)*
- *Automobile Liability*
- *Excess Liability or Umbrella (i.e., bundled commercial general liability, directors' and officers' liability, legal liability, employment practices liability, automobile liability, and sexual abuse liability)*
- *Workers Compensation Liability*
- *Surety bond for the school's chief financial officer in an amount to be determined based on the cash flow of the school.*

Include evidence to support the budget expense assumptions related to insuring the school such as copies of broker or agency estimates.

Evaluation Criteria

A response that meets the standard will

- *Evidence of requisite insurance coverage or ability to obtain requisite insurance coverage*
- *Evidence of requisite surety bond for school CFO or ability to obtain requisite surety bond*

Introduction

Kauffman School leadership will make final decisions regarding contracts for services such as insurance prior to the school's opening. This application, however, provides appropriate assurances that a potential insurance provider is identified and adequate budgeting has taken place in preparation for acquisition of coverage.

Scott Wightman and Michael Brown serve as CharterSafe representatives at Arthur J. Gallagher Risk Management Services in St. Louis, MO and provided information presented in this section. CharterSafe is the nation's first insurance program designed especially for charter public

schools, and is available to any charter school operating in Missouri. All carriers for CharterSafe are rated at least A-BEST.

The list below identifies CharterSafe's capacity to provide required insurance, and also presents any necessary additional information for each category. CharterSafe offers a standard \$11 million coverage policy, with statutory coverage limits for Worker's Compensation and employee theft. Cost to the Kauffman School in Year One is estimated to be \$10,000 (based on costs for other charter schools with similar liabilities). At full enrollment, the annual cost is estimated at \$60,000 (based on costs for a school of same size in St. Louis with similar liabilities).

- Directors' and Officers' Liability
 - Available through CharterSafe
 - May be accessed during school's pre-operational year for school board members at an approximate cost of \$1,200 per year
- Commercial General Comprehensive Liability that also expressly covers corporal punishment and athletic participation
 - Available through CharterSafe
- Educator's Legal Liability
 - Available through CharterSafe
- Employment Practices Liability
 - Available through CharterSafe
- Sexual Abuse Liability (separate policy or a separate part of general comprehensive insurance with independent limits)
 - Available through CharterSafe
 - General comprehensive insurance with independent limits
- Automobile Liability
 - Available through CharterSafe
- Excess Liability or Umbrella (i.e., bundled commercial general liability, directors' and officers' liability, legal liability, employment practices liability, automobile liability, and sexual abuse liability)
 - Available through CharterSafe
- Workers Compensation Liability
 - Statutory coverage limit is always provided
 - Additional employer's liability (\$1 million, rarely accessed)
 - Available through CharterSafe
- Surety bond for the school's chief financial officer in an amount to be determined based on the cash flow of the school.
 - 160.405.13 allows a charter school the option of obtaining a surety bond or acquiring an insurance policy covering all employees in the amount of at least \$500,000 in the event of employee theft
 - The Kauffman School will acquire the appropriate insurance policy (available through CharterSafe).

Section C.6 (Pre-Opening Plan)

Applicant Instructions

Provide a Pre-Opening Plan that documents key tasks to be completed between approval of the application and opening of the school. Include a schedule for initiation, development, and completion of those tasks, identify primary responsibility by individual or position, and document anticipated resource needs.

Evaluation Criteria

A response that meets the standard will demonstrate understanding of key pre-opening responsibilities consistent with the school's education, organizational, and business plans.

Start-up Year Plan

For the purposes of this application, the Kauffman School's "start-up year" runs from August 2, 2010 thru July 29, 2011. The matrix provided in Appendix C.6-1 outlines key task areas, task descriptions, and the position primarily responsible for completion of the task. These tasks and timelines may change as the school moves forward, and the list is by no means exhaustive. The matrix demonstrates the Kauffman School's capacity to plan for its start-up year and demonstrates the need for hiring its leadership team so far in advance of the school's opening.

The Kauffman Foundation will provide financial resources during the school's start-up year to ensure all action items listed in the matrix, as well as any other essential tasks, are supported and completed. The school's leadership team (Executive Director and Director of Curriculum and Instruction) will have an anticipated start date of August 2, 2010. The priority of the start-up year is to accomplish critical development tasks and activities in anticipation of as strong a start as possible in Year One. A secondary priority is to develop leadership at the school and build networks with leaders of other high-performing schools through training and shadowing opportunities.

It is assumed several tasks are in progress prior to the assumed start date of leadership personnel on August 2, 2010. These tasks include the facilities search, board development, production of the school's Federal CSP grant, and all the research and experience outlined in this application. The Kauffman School Design Team will be available to provide assistance to the school leadership and continue working on activities already in progress.

**EWING MARION KAUFFMAN SCHOOL
APPLICATION APPENDICES**

Contents

Section A: Pages 3 - 78

A.2-1: Scope and Sequence, English and Mathematics (Grades 5-8)	p. 3
A.2-2: Scope and Sequence, English and Mathematics (Grades 9-12)	p. 19
A.2-3: Scope and Sequence (Financial and Technological Literacy)	p. 25
A.2-4: Sample Lesson Plan (5 th Grade Mathematics)	p. 43
A.2-5: Sample Lesson Plan (9 th Grade English)	p. 48
A.4-1: 2011-12 Kauffman School Calendar	p. 59
A.4-2: Sample Daily Schedule (Grade 5)	p. 60
A.4-3: Sample Daily Schedule (Grade 8)	p. 61
A.4-4: Sample Daily Schedule (Grade 9)	p. 62
A.8-1: Life Prep Assessment Options	p. 63
A.9-1: SAMPLE Kauffman School Student Policy Guide Excerpt	p. 65

Section B: Pages 79 - 158

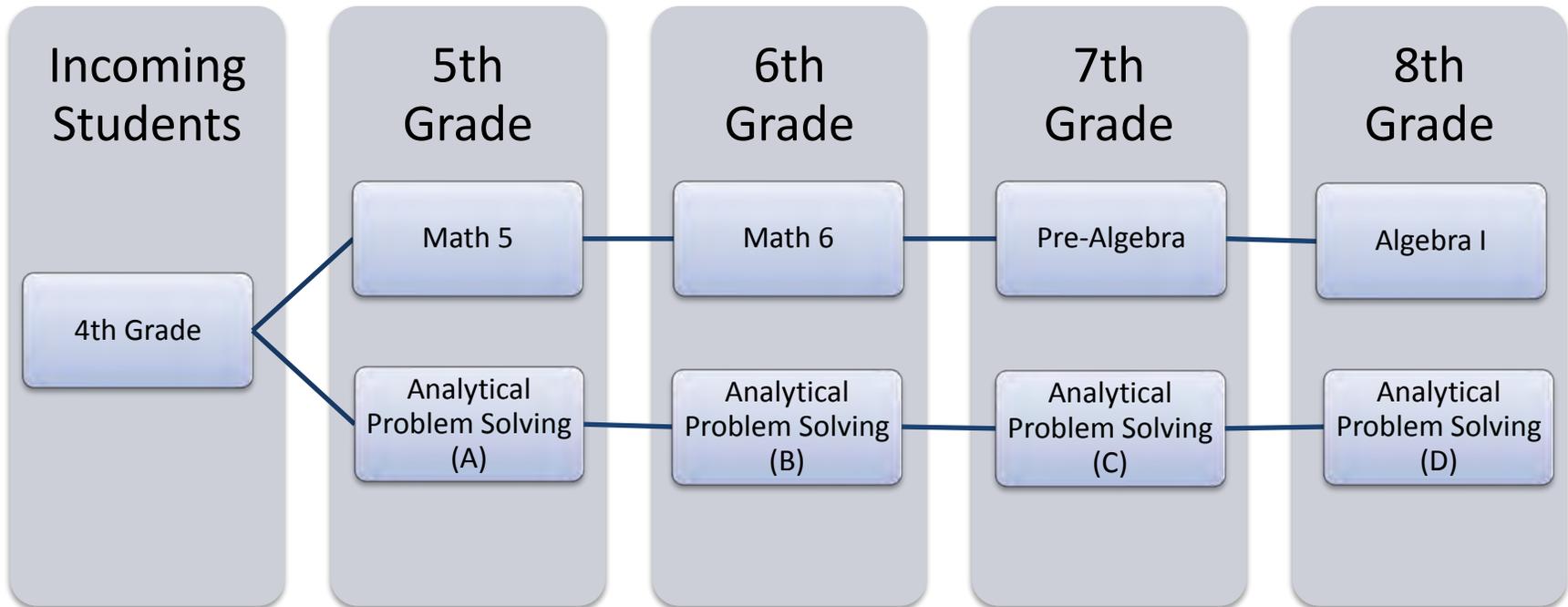
B.1-1: Articles of Incorporation	p. 79
B.1-2: Corporate Bylaws	p. 83
B.1-3: Documentation of Missouri Nonprofit Status	p. 93
B.1-4: Documentation of IRS Application Status	p. 95
B.1-5: Documentation of Criminal Background and Child Abuse Registry Checks	p. 97
B.2-1: CV and Request for Information from Prospective School Board Member, Jorge Cadenas	p. 99
B.2-2: CV and Request for Information from Prospective School Board Member, R. Stephen Green	p. 107
B.2-3: CV and Request for Information from Prospective School Board Member, Aaron North	p. 115
B.2-4: CV and Request for Information from Prospective School Board Member, Munro Richardson	p. 123
B.3-1: Kauffman School Organizational Chart	p. 131
B.3-2: Executive Director Position Description	p. 133
B.3-3: Director of Curriculum and Instruction Position Description	p. 137
B.4-1: Kauffman School Ten-Year Staffing/Enrollment Summary	p. 141
B.4-2: SAMPLE Kauffman School Employee Policy Manual Excerpt	p. 143
B.5-1: Kauffman School Ten-Year Enrollment Matrix	p. 157

Section C: Pages 159 - 171

C.1-1: Kauffman School Budget Template	p. 159
C.1-2: Kauffman School Cash Flow Analysis	p. 160
C.1-3: Kauffman Foundation Letter of Support	p. 161
C.1-4: Kauffman Ten-Year Budget Forecast	p. 163
C.6-1: Kauffman School Start-up Year Activity Matrix	p. 165

Appendix A.2-1: Kauffman School Scope and Sequence (Grades 5-8)

Mathematics: Course Flow Chart



Mathematics: Content

Strand I: Numbers and Operations

5th Grade

- **Understand numbers, representing, and number systems**
 - *Read, write and compare numbers*
 - *Represent and use rational numbers*
 - *Compose and decompose numbers*
 - *Classify and describe numeric relationships*
- **Operations and how they relate to one another**
 - *Represent operations*
 - *Describe effects of operations*
- **Compute and estimate**
 - *Describe or represent mental strategies*
 - *Develop and demonstrate fluency*
 - *Compute problems*
 - *Estimate and justify solutions*

6th Grade

- **Understand numbers, representing, and number systems**
 - *Read, write and compare numbers*
 - *Represent and use rational numbers*
 - *Compose and decompose numbers*
- **Operations and how they relate to one another**
 - *Describe effects of operations*
 - *Apply properties of operations*
 - *Apply operations on real and complex numbers*
- **Compute and estimate**
 - *Compute problems*
 - *Estimate and justify solutions*

7th Grade

- **Understand numbers, representing, and number systems**
 - *Read, write and compare numbers*
 - *Represent and use rational numbers*
 - *Compose and decompose numbers*
- **Operations and how they relate to one another**
 - *Describe effects of operations*
 - *Apply properties of operations*
 - *Apply operations on real and complex numbers*
- **Compute and estimate**
 - *Compute problems*
 - *Estimate and justify solutions*
 - *Use proportional reasoning*

8th Grade

- **Understand numbers, representing, and number systems**
 - *Read, write and compare numbers*
 - *Represent and use rational numbers*
 - *Compose and decompose numbers*
- **Operations and how they relate to one another**
 - *Apply properties of operations*
- **Compute and estimate**
 - *Estimate and justify solutions*

Mathematics: Content

Strand 2: Algebraic Relationships

5th Grade

- **Patterns, relations and functions**
 - *Recognize and extend patterns*
 - *Create and analyze patterns*
- **Represent and analyze using algebraic symbols**
 - *Represent mathematical situations*
 - *Describe and use mathematical manipulation*
- **Represent and understand quantitative relationships**
 - *Use mathematical models*
- **Analyze change in various contexts**
 - *Analyze change*

6th Grade

- **Patterns, relations and functions**
 - *Create and analyze patterns*
 - *Classify objects and representations*
 - *Identify and compare functions*
- **Represent and analyze using algebraic symbols**
 - *Represent mathematical situations*
 - *Describe and use mathematical manipulation*
- **Represent and understand quantitative relationships**
 - *Use mathematical models*
- **Analyze change in various contexts**
 - *Analyze change*

7th Grade

- **Patterns, relations and functions**
 - *Create and analyze patterns*
 - *Classify objects and representations*
 - *Identify and compare functions*
- **Represent and analyze using algebraic symbols**
 - *Represent mathematical situations*
 - *Describe and use mathematical manipulation*
- **Represent and understand quantitative relationships**
 - *Use mathematical models*
- **Analyze change in various contexts**
 - *Analyze change*

8th Grade

- **Patterns, relations and functions**
 - *Create and analyze patterns*
 - *Classify objects and representations*
 - *Identify and compare functions*
- **Represent and analyze using algebraic symbols**
 - *Represent mathematical situations*
 - *Describe and use mathematical manipulation*
- **Represent and understand quantitative relationships**
 - *Use mathematical models*
- **Analyze change in various contexts**
 - *Analyze change*

Mathematics: Content

Strand 3: Geometric and Spatial Relationships

5th Grade

- **Analyze characteristics and properties of geometric relationships**
 - *Describe and use geometric relationships*
 - *Compose and decompose shapes*
- **Spatial relationships**
 - Use coordinate systems
- **Transformations and use symmetry**
 - *Use transformations on objects*
 - *Use symmetry*
- **Visualization, spatial reasoning and geometric modeling**
 - *Recognize and draw three-dimensional representations*

6th Grade

- **Analyze characteristics and properties of geometric relationships**
 - *Describe and use geometric relationships*
- **Spatial relationships**
 - Use coordinate systems
- **Transformations and use symmetry**
 - *Use transformations on objects*
 - *Use symmetry*
- **Visualization, spatial reasoning and geometric modeling**
 - *Recognize and draw three-dimensional representations*
 - *Draw and use visual models*

7th Grade

- **Analyze characteristics and properties of geometric relationships**
 - *Describe and use geometric relationships*
 - *Apply geometric relationships*
- **Spatial relationships**
 - Use coordinate systems
- **Transformations and use symmetry**
 - *Use transformations on functions*
 - *Use symmetry*
- **Visualization, spatial reasoning and geometric modeling**
 - *Recognize and draw three-dimensional representations*
 - *Draw and use visual models*

8th Grade

- **Analyze characteristics and properties of geometric relationships**
 - *Describe and use geometric relationships*
- **Spatial relationships**
 - Use coordinate systems
- **Transformations and use symmetry**
 - *Use transformations on objects*
 - *Use transformations on functions*
 - *Use symmetry*
- **Visualization, spatial reasoning and geometric modeling**
 - *Recognize and draw three-dimensional representations*
 - *Draw and use visual models*

Mathematics: Content

Strand 4: Measurement

5th Grade

- **Measurable attributes of objects and the units**
 - *Determine unit of measurement*
 - *Identify equivalent measures*
- **Techniques, tools and formulas to determine measurement**
 - *Apply geometric measurements*
 - *Use relationships within a measurement system*

6th Grade

- **Measurable attributes of objects and the units**
 - *Determine unit of measurement*
 - *Tell and use units of time*
- **Techniques, tools and formulas to determine measurement**
 - *Use angle measurement*
 - *Apply geometric measurements*
 - *Use relationships within a measurement system*

7th Grade

- **Measurable attributes of objects and the units**
 - *Determine unit of measurement*
 - *Identify equivalent measures*
 - *Tell and use units of time*
- **Techniques, tools and formulas to determine measurement**
 - *Use angle measurement*
 - *Apply geometric measurements*
 - *Use relationships within a measurement system*

8th Grade

- **Techniques, tools and formulas to determine measurement**
 - *Use angle measurement*
 - *Analyze precision*

Mathematics: Content

Strand 5: Data and Probability

5th Grade

- **Collect, organize, and display relevant data**
 - *Formulate questions*
 - *Represent and interpret data*
- **Use appropriate statistical methods to analyze data**
 - *Describe and analyze data*
- **Develop and evaluate inferences and predictions**
 - *Develop and evaluate inferences*
- **Apply basic concepts of probability**
 - *Apply basic concepts of probability*

6th Grade

- **Collect, organize, and display relevant data**
 - *Formulate questions*
 - *Represent and interpret data*
- **Use appropriate statistical methods to analyze data**
 - *Describe and analyze data*
- **Develop and evaluate inferences and predictions**
 - *Develop and evaluate inferences*
- **Apply basic concepts of probability**
 - *Apply basic concepts of probability*

7th Grade

- **Collect, organize, and display relevant data**
 - *Represent and interpret data*
- **Use appropriate statistical methods to analyze data**
 - *Describe and analyze data*
- **Develop and evaluate inferences and predictions**
 - *Develop and evaluate inferences*
- **Apply basic concepts of probability**
 - *Apply basic concepts of probability*

8th Grade

- **Collect, organize, and display relevant data**
 - *Represent and interpret data*
- **Use appropriate statistical methods to analyze data**
 - *Describe and analyze data*
 - *Compare data representations*
- **Develop and evaluate inferences and predictions**
 - *Develop and evaluate inferences*

Mathematics: Performance Standards

Goal 1

5th Grade

- **Acquire the knowledge and skills to gather, analyze and apply information and ideas**
- *develop questions and ideas to initiate and refine research*
- *conduct research to answer questions and evaluate information and ideas*
- *use technological tools and other resources to locate, select and organize information*
- *comprehend and evaluate written, visual and oral presentations and works*
- *discover and evaluate patterns and relationships in information, ideas and structures*
- *evaluate the accuracy of information and the reliability of its sources*
- *organize data, information and ideas into useful forms (including charts, graphs, outlines) for analysis or presentation*
- *identify, analyze and compare the institutions, traditions and art forms of past and present societies*
- *apply acquired information, ideas and skills to different contexts as students, workers, citizens and consumers*

6th Grade

- **Acquire the knowledge and skills to gather, analyze and apply information and ideas**
- *develop questions and ideas to initiate and refine research*
- *conduct research to answer questions and evaluate information and ideas*
- *design and conduct field and laboratory investigations to study nature and society*
- *use technological tools and other resources to locate, select and organize information*
- *comprehend and evaluate written, visual and oral presentations and works*
- *discover and evaluate patterns and relationships in information, ideas and structures*
- *evaluate the accuracy of information and the reliability of its sources*
- *organize data, information and ideas into useful forms (including charts, graphs, outlines) for analysis or presentation*
- *identify, analyze and compare the institutions, traditions and art forms of past and present societies*
- *apply acquired information, ideas and skills to different contexts as students, workers, citizens and consumers*

7th Grade

- **Acquire the knowledge and skills to gather, analyze and apply information and ideas**
- *develop questions and ideas to initiate and refine research*
- *conduct research to answer questions and evaluate information and ideas*
- *design and conduct field and laboratory investigations to study nature and society*
- *use technological tools and other resources to locate, select and organize information*
- *comprehend and evaluate written, visual and oral presentations and works*
- *discover and evaluate patterns and relationships in information, ideas and structures*
- *evaluate the accuracy of information and the reliability of its sources*
- *organize data, information and ideas into useful forms (including charts, graphs, outlines) for analysis or presentation*
- *identify, analyze and compare the institutions, traditions and art forms of past and present societies*
- *apply acquired information, ideas and skills to different contexts as students, workers, citizens and consumers*

8th Grade

- **Acquire the knowledge and skills to gather, analyze and apply information and ideas**
- *develop questions and ideas to initiate and refine research*
- *conduct research to answer questions and evaluate information and ideas*
- *design and conduct field and laboratory investigations to study nature and society*
- *use technological tools and other resources to locate, select and organize information*
- *comprehend and evaluate written, visual and oral presentations and works*
- *discover and evaluate patterns and relationships in information, ideas and structures*
- *evaluate the accuracy of information and the reliability of its sources*
- *organize data, information and ideas into useful forms (including charts, graphs, outlines) for analysis or presentation*
- *identify, analyze and compare the institutions, traditions and art forms of past and present societies*
- *apply acquired information, ideas and skills to different contexts as students, workers, citizens and consumers*

Mathematics: Performance Standards

Goal 2

5th Grade

- **Communicate effectively within and beyond the classroom**
- *plan and make written, oral and visual presentations for a variety of purposes and audiences*
- *review and revise communications to improve accuracy and clarity*
- *exchange information, questions and ideas while recognizing the perspectives of others*
- *present perceptions and ideas regarding works of the arts, humanities and sciences*
- *perform or produce works in the fine and practical arts*
- *apply communication techniques to the job search and to the workplace*
- *use technological tools to exchange information and ideas*

6th Grade

- **Communicate effectively within and beyond the classroom**
- *plan and make written, oral and visual presentations for a variety of purposes and audiences*
- *review and revise communications to improve accuracy and clarity*
- *exchange information, questions and ideas while recognizing the perspectives of others*
- *present perceptions and ideas regarding works of the arts, humanities and sciences*
- *perform or produce works in the fine and practical arts*
- *apply communication techniques to the job search and to the workplace*
- *use technological tools to exchange information and ideas*

7th Grade

- **Communicate effectively within and beyond the classroom**
- *plan and make written, oral and visual presentations for a variety of purposes and audiences*
- *review and revise communications to improve accuracy and clarity*
- *exchange information, questions and ideas while recognizing the perspectives of others*
- *present perceptions and ideas regarding works of the arts, humanities and sciences*
- *perform or produce works in the fine and practical arts*
- *apply communication techniques to the job search and to the workplace*
- *use technological tools to exchange information and ideas*

8th Grade

- **Communicate effectively within and beyond the classroom**
- *plan and make written, oral and visual presentations for a variety of purposes and audiences*
- *review and revise communications to improve accuracy and clarity*
- *exchange information, questions and ideas while recognizing the perspectives of others*
- *present perceptions and ideas regarding works of the arts, humanities and sciences*
- *perform or produce works in the fine and practical arts*
- *apply communication techniques to the job search and to the workplace*
- *use technological tools to exchange information and ideas*

Mathematics: Performance Standards

Goal 3

5th Grade

- **Recognize and solve problems.**
- *identify problems and define their scope and elements*
- *develop and apply strategies based on ways others have prevented or solved problems*
- *develop and apply strategies based on one's own experience in preventing or solving problems*
- *evaluate the processes used in recognizing and solving problems*
- *reason inductively from a set of specific facts and deductively from general premises*
- *examine problems and proposed solutions from multiple perspectives*
- *evaluate the extent to which a strategy addresses the problem*
- *assess costs, benefits and other consequences of proposed solutions*

6th Grade

- **Recognize and solve problems.**
- *identify problems and define their scope and elements*
- *develop and apply strategies based on ways others have prevented or solved problems*
- *develop and apply strategies based on one's own experience in preventing or solving problems*
- *evaluate the processes used in recognizing and solving problems*
- *reason inductively from a set of specific facts and deductively from general premises*
- *examine problems and proposed solutions from multiple perspectives*
- *evaluate the extent to which a strategy addresses the problem*
- *assess costs, benefits and other consequences of proposed solutions*

7th Grade

- **Recognize and solve problems.**
- *identify problems and define their scope and elements*
- *develop and apply strategies based on ways others have prevented or solved problems*
- *develop and apply strategies based on one's own experience in preventing or solving problems*
- *evaluate the processes used in recognizing and solving problems*
- *reason inductively from a set of specific facts and deductively from general premises*
- *examine problems and proposed solutions from multiple perspectives*
- *evaluate the extent to which a strategy addresses the problem*
- *assess costs, benefits and other consequences of proposed solutions*

8th Grade

- **Recognize and solve problems.**
- *identify problems and define their scope and elements*
- *develop and apply strategies based on ways others have prevented or solved problems*
- *develop and apply strategies based on one's own experience in preventing or solving problems*
- *evaluate the processes used in recognizing and solving problems*
- *reason inductively from a set of specific facts and deductively from general premises*
- *examine problems and proposed solutions from multiple perspectives*
- *evaluate the extent to which a strategy addresses the problem*
- *assess costs, benefits and other consequences of proposed solutions*

Mathematics: Performance Standards

Goal 4

5th Grade

- **Make decisions and act as responsible members of society**
- *explain reasoning and identify information used to support decisions*
- *understand and apply the rights and responsibilities of citizenship in Missouri and the United States*
- *analyze the duties and responsibilities of individuals in societies*
- *recognize and practice honesty and integrity in academic work and in the workplace*
- *develop, monitor and revise plans of action to meet deadlines and accomplish goals*
- *identify tasks that require a coordinated effort and work with others to complete those tasks*
- *identify and apply practices that preserve and enhance the safety and health of self and others*
- *explore, prepare for and seek educational and job opportunities*

6th Grade

- **Make decisions and act as responsible members of society**
- *explain reasoning and identify information used to support decisions*
- *understand and apply the rights and responsibilities of citizenship in Missouri and the United States*
- *analyze the duties and responsibilities of individuals in societies*
- *recognize and practice honesty and integrity in academic work and in the workplace*
- *develop, monitor and revise plans of action to meet deadlines and accomplish goals*
- *identify tasks that require a coordinated effort and work with others to complete those tasks*
- *identify and apply practices that preserve and enhance the safety and health of self and others*
- *explore, prepare for and seek educational and job opportunities*

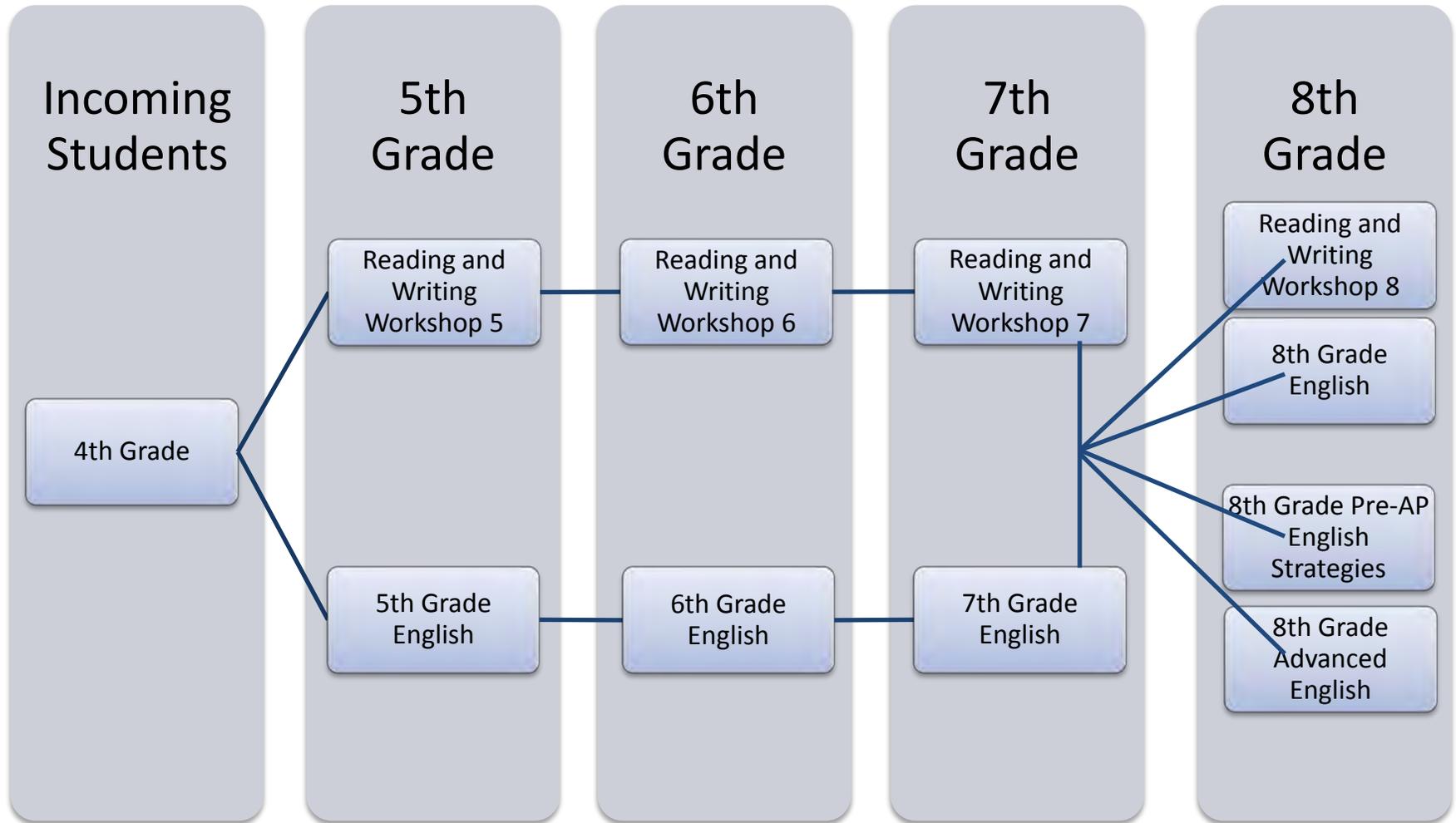
7th Grade

- **Make decisions and act as responsible members of society**
- *explain reasoning and identify information used to support decisions*
- *understand and apply the rights and responsibilities of citizenship in Missouri and the United States*
- *analyze the duties and responsibilities of individuals in societies*
- *recognize and practice honesty and integrity in academic work and in the workplace*
- *develop, monitor and revise plans of action to meet deadlines and accomplish goals*
- *identify tasks that require a coordinated effort and work with others to complete those tasks*
- *identify and apply practices that preserve and enhance the safety and health of self and others*
- *explore, prepare for and seek educational and job opportunities*

8th Grade

- **Make decisions and act as responsible members of society**
- *explain reasoning and identify information used to support decisions*
- *understand and apply the rights and responsibilities of citizenship in Missouri and the United States*
- *analyze the duties and responsibilities of individuals in societies*
- *recognize and practice honesty and integrity in academic work and in the workplace*
- *develop, monitor and revise plans of action to meet deadlines and accomplish goals*
- *identify tasks that require a coordinated effort and work with others to complete those tasks*
- *identify and apply practices that preserve and enhance the safety and health of self and others*
- *explore, prepare for and seek educational and job opportunities*

English: Course Flow Chart



English: Content

Reading

5th Grade

- **Develop and apply skills and strategies to the reading process**
 - *Fluency*
 - *Vocabulary*
 - *Pre-Reading*
 - *During Reading*
 - *Post-Reading*
 - *Making Connections*
- **Develop and apply skills and strategies to comprehend, analyze and evaluate fiction, poetry and drama from a variety of cultures and times**
 - *Text Features*
 - *Literary Techniques*
 - *Literary Elements*

6th Grade

- **Develop and apply skills and strategies to the reading process**
 - *Fluency*
 - *Vocabulary*
 - *Pre-Reading*
 - *During Reading*
 - *Post-Reading*
 - *Making Connections*
- **Develop and apply skills and strategies to comprehend, analyze and evaluate fiction, poetry and drama from a variety of cultures and times**
 - *Text Features*
 - *Literary Techniques*
 - *Literary Elements*

7th Grade

- **Develop and apply skills and strategies to the reading process**
 - *Fluency*
 - *Vocabulary*
 - *Pre-Reading*
 - *During Reading*
 - *Post-Reading*
 - *Making Connections*
- **Develop and apply skills and strategies to comprehend, analyze and evaluate fiction, poetry and drama from a variety of cultures and times**
 - *Text Features*
 - *Literary Techniques*
 - *Literary Elements*

8th Grade

- **Develop and apply skills and strategies to the reading process**
 - *Fluency*
 - *Vocabulary*
 - *Pre-Reading*
 - *During Reading*
 - *Post-Reading*
 - *Making Connections*
- **Develop and apply skills and strategies to comprehend, analyze and evaluate fiction, poetry and drama from a variety of cultures and times**
 - *Text Features*
 - *Literary Techniques*
 - *Literary Elements*

English: Content

Reading

5th Grade

- Develop and apply skills and strategies to comprehend, analyse and evaluate nonfiction (such as biographies, newspapers, technical manuals) from a variety of cultures and times.
- Text Features*
- Literary Techniques*
- Text Structure*
- Understanding Directions*

6th Grade

- Develop and apply skills and strategies to comprehend, analyse and evaluate nonfiction (such as biographies, newspapers, technical manuals) from a variety of cultures and times.
- Text Features*
- Literary Techniques*
- Text Structure*
- Understanding Directions*

7th Grade

- Develop and apply skills and strategies to comprehend, analyse and evaluate nonfiction (such as biographies, newspapers, technical manuals) from a variety of cultures and times.
- Text Features*
- Literary Techniques*
- Text Structure*
- Understanding Directions*

8th Grade

- Develop and apply skills and strategies to comprehend, analyse and evaluate nonfiction (such as biographies, newspapers, technical manuals) from a variety of cultures and times.
- Text Features*
- Literary Techniques*
- Text Structure*
- Understanding Directions*

English: Content

Writing

5th Grade

- **Apply a writing process in composing text**
 - *Writing Process*
- **Compose well-developed text**
 - Audience and Purpose
 - Ideas and Content
 - Organization and Sentence Structure
 - Word Choice
 - Conventions
- **Write effectively in various forms and types of writing**
 - *Forms/Types/Modes of Writing*

6th Grade

- **Apply a writing process in composing text**
 - *Writing Process*
- **Compose well-developed text**
 - Audience and Purpose
 - Ideas and Content
 - Organization and Sentence Structure
 - Word Choice
 - Conventions
- **Write effectively in various forms and types of writing**
 - *Forms/Types/Modes of Writing*

7th Grade

- **Apply a writing process in composing text**
 - *Writing Process*
- **Compose well-developed text**
 - Audience and Purpose
 - Ideas and Content
 - Organization and Sentence Structure
 - Word Choice
 - Conventions
- **Write effectively in various forms and types of writing**
 - *Forms/Types/Modes of Writing*

8th Grade

- **Apply a writing process in composing text**
 - *Writing Process*
- **Compose well-developed text**
 - Audience and Purpose
 - Ideas and Content
 - Organization and Sentence Structure
 - Word Choice
 - Conventions
- **Write effectively in various forms and types of writing**
 - *Forms/Types/Modes of Writing*

English: Content
Listening and Speaking

5th Grade

- **Develop and apply effective listening skills and strategies**
 - *Purpose for Listening*
 - *Listening Behavior*
- **Develop and apply effective speaking skills and strategies for various audiences and purposes**
 - Discussion and Presentation
 - Giving Directions

6th Grade

- **Develop and apply effective listening skills and strategies**
 - *Purpose for Listening*
 - *Listening Behavior*
- **Develop and apply effective speaking skills and strategies for various audiences and purposes**
 - Discussion and Presentation
 - Giving Directions

7th Grade

- **Develop and apply effective listening skills and strategies**
 - *Purpose for Listening*
 - *Listening Behavior*
- **Develop and apply effective speaking skills and strategies for various audiences and purposes**
 - Discussion and Presentation
 - Giving Directions

8th Grade

- **Develop and apply effective listening skills and strategies**
 - *Purpose for Listening*
 - *Listening Behavior*
- **Develop and apply effective speaking skills and strategies for various audiences and purposes**
 - Discussion and Presentation
 - Giving Directions

English: Content
Information Literacy

5th Grade

- **Develop and apply effective research process skills to gather, analyze and evaluate information.**
- *Research Plan*
- *Acquire Information*
- *Record Information*
- *Sources Consulted*
- *Media Messages*

6th Grade

- **Develop and apply effective research process skills to gather, analyze and evaluate information.**
- *Research Plan*
- *Acquire Information*
- *Record Information*
- *Sources Consulted*
- *Media Messages*

7th Grade

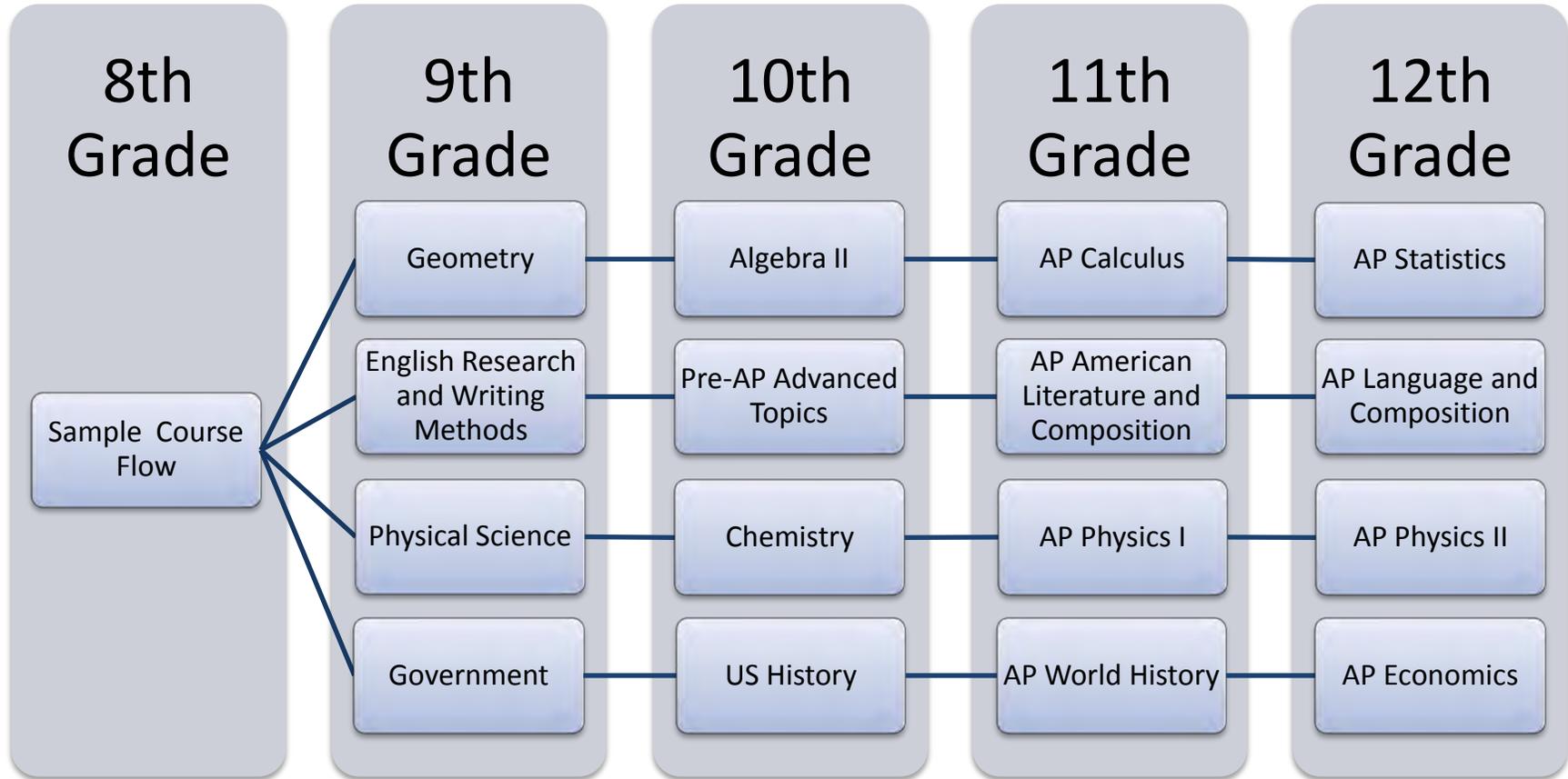
- **Develop and apply effective research process skills to gather, analyze and evaluate information.**
- *Research Plan*
- *Acquire Information*
- *Record Information*
- *Sources Consulted*
- *Media Messages*

8th Grade

- **Develop and apply effective research process skills to gather, analyze and evaluate information.**
- *Research Plan*
- *Acquire Information*
- *Record Information*
- *Sources Consulted*
- *Media Messages*

Appendix A.2-2: Kauffman School Scope and Sequence (Grades 9-12)

Sample Course Flow



Mathematics

Geometry

- **Number and Operations**
 - Understand numbers, ways of representing numbers, relationships among numbers and number systems
 - Understand meanings of operations and how they relate to one another
 - Compute fluently and make reasonable estimates
- **Algebraic Relationships**
 - Understand patterns, relations and functions
 - Use mathematical models to represent and understand quantitative relationships
 - Analyze change in various contexts

Algebra II

- **Number and Operations**
 - Understand numbers, ways of representing numbers, relationships among numbers and number systems
 - Understand meanings of operations and how they relate to one another
 - Compute fluently and make reasonable estimates
- **Algebraic Relationships**
 - Understand patterns, relations and functions
 - Represent and analyze mathematical situations and structures using algebraic symbols
 - Use mathematical models to represent and understand quantitative relationships
 - Analyze change in various contexts

AP Calculus

- **Functions, Graphs, and Limits**
 - Analysis of graphs
 - Limits of functions (including one-sided limits)
 - Asymptotic and unbounded behavior
 - Continuity as a property of functions
- **Derivatives**
 - Concept of the derivative
 - Derivative at a point
 - Derivative as a function
 - Second derivatives
 - Applications of derivatives
 - Computation of derivatives

AP Statistics

- **Exploring Data: Describing patterns and departures from patterns**
 - Constructing and interpreting graphical displays of distributions of univariate data (dotplot, stemplot, histogram, cumulative frequency plot)
 - Summarizing distributions of univariate data
 - Comparing distributions of univariate data (dotplots, back-to-back stemplots, parallel boxplots)
 - Exploring bivariate data
 - Exploring categorical data
- **Sampling and Experimentation: Planning and conducting a study**
 - Overview of methods of data collection
 - Planning and conducting surveys
 - Planning and conducting experiments
 - Generalizability of results and types of conclusions that can be drawn from
 - Observational studies, experiments, and surveys

Mathematics – Continued

Geometry

- **Geometric and Spatial Relationships**
 - Analyze characteristics and properties of two- and three-dimensional geometric shapes and develop mathematical arguments about geometric relationships
 - Specify locations and describe spatial relationships using coordinate geometry and other representational systems
 - Apply transformations and use symmetry to analyze mathematical situations
 - Use visualization, spatial reasoning and geometric modeling to solve problems
- **Measurement**
 - Apply appropriate techniques, tools and formulas to determine measurements
- **Data and Probability**
 - Formulate questions that can be addressed with data and collect, organize and display relevant data to answer them

Algebra II

- **Geometric and Spatial Relationships**
 - Analyze characteristics and properties of two- and three-dimensional geometric shapes and develop mathematical arguments about geometric relationships
 - Apply transformations and use symmetry to analyze mathematical situations
 - Use visualization, spatial reasoning and geometric modeling to solve problems
- **Measurement**
 - Apply appropriate techniques, tools and formulas to determine measurements
- **Data and Probability**
 - Formulate questions that can be addressed with data and collect, organize and display relevant data to answer them
 - Select and use appropriate statistical methods to analyze data
 - Understand and apply basic concepts of probability

AP Calculus

- **Integrals**
 - Interpretations and properties of definite integrals
 - Applications of integrals
 - Fundamental Theorem of Calculus
 - Techniques of antidifferentiation
 - Applications of antidifferentiation
 - Numerical approximations to definite integrals

AP Statistics

- **Anticipating Patterns: Exploring random phenomena using probability and simulation**
 - Probability
 - Combining independent random variables
 - The normal distribution
 - Sampling distributions
- **Statistical Inference: Estimating population parameters and testing hypotheses**
 - Estimation (point estimators and confidence intervals)
 - Tests of significance

English Language Arts

English Research and Writing Methods

- **Speaking and writing standard English**
 - *Compose a well developed text*
 - *Audience and purpose*
 - *Ideas and content*
 - *Organization and Sentence Structure*
 - *Word Choice*
 - *Conventions*
 - *Forms/Types/Modes of writing*
- **Writing formally**
 - *Apply a writing process in composing text*
 - *Writing Process*
- **Comprehending and evaluating the content and aspects of oral and visual presentations**
 - *Develop and apply effective listening skills and strategies*
 - *Purpose for listening*
 - *Listening Behavior*

Pre-AP Advanced Topics

- **Speaking and writing standard English**
 - *Compose a well developed text*
 - *Audience and purpose*
 - *Ideas and content*
 - *Organization and Sentence Structure*
 - *Word Choice*
 - *Conventions*
 - *Forms/Types/Modes of writing*
- **Writing formally**
 - *Apply a writing process in composing text*
 - *Writing Process*
- **Comprehending and evaluating the content and aspects of oral and visual presentations**
 - *Develop and apply effective listening skills and strategies*
 - *Purpose for listening*
 - *Listening Behavior*

AP American Literature and Composition

- **Speaking and writing standard English**
 - *Compose a well developed text*
 - *Audience and purpose*
 - *Ideas and content*
 - *Organization and Sentence Structure*
 - *Word Choice*
 - *Conventions*
 - *Forms/Types/Modes of writing*
- **Writing formally**
 - *Apply a writing process in composing text*
 - *Writing Process*
- **Comprehending and evaluating the content and aspects of oral and visual presentations**
 - *Develop and apply effective listening skills and strategies*
 - *Purpose for listening*
 - *Listening Behavior*

AP Language and Composition

- **Speaking and writing standard English**
 - *Compose a well developed text*
 - *Audience and purpose*
 - *Ideas and content*
 - *Organization and Sentence Structure*
 - *Word Choice*
 - *Conventions*
 - *Forms/Types/Modes of writing*
- **Writing formally**
 - *Move effectively through the stages of the writing process, with careful attention to inquiry and research, drafting, revising, editing, and review*
 - *Effective use of rhetoric, including controlling tone, maintaining a consistent voice, and achieving emphasis through parallelism and antithesis.*

English Language Arts – Continued

English Research and Writing Methods

- **Formal and informal presentation participation and discussions**
 - *Develop and apply speaking skills and strategies for various audiences and purposes*
- **Identifying and evaluating relationships between language and culture**
 - *Develop and apply effective research process skills to gather, analyze and evaluate information.*
 - *Research Plan*
 - *Acquire Information*
 - *Record Information*
 - *Sources Consulted*
 - *Media Messages*

Pre-AP Advanced Topics

- **Formal and informal presentation participation and discussions**
 - *Develop and apply speaking skills and strategies for various audiences and purposes*
- **Identifying and evaluating relationships between language and culture**
 - *Develop and apply effective research process skills to gather, analyze and evaluate information.*
 - *Research Plan*
 - *Acquire Information*
 - *Record Information*
 - *Sources Consulted*
 - *Media Messages*

AP American Literature and Composition

- **Formal and informal presentation participation and discussions**
 - *Develop and apply speaking skills and strategies for various audiences and purposes*
- **Identifying and evaluating relationships between language and culture**
 - *Develop and apply effective research process skills to gather, analyze and evaluate information.*
 - *Research Plan*
 - *Acquire Information*
 - *Record Information*
 - *Sources Consulted*
 - *Media Messages*

AP Language and Composition

- **Comprehending and evaluating the content and aspects of oral and visual presentations**
- **Formal and informal presentation participation and discussions**
 - *Develop and apply speaking skills and strategies for various audiences and purposes*
- **Identifying and evaluating relationships between language and culture**
 - *Develop and apply effective research process skills to gather, analyze and evaluate information.*
 - *Research Plan*
 - *Acquire Information*
 - *Record Information*
 - *Sources Consulted*
 - *Media Messages*

English Language Arts - Continued

English Research and Writing Methods

- **Reading and evaluating fiction, non fiction, drama and poetry**
- *Inquiry based close reading and critical thinking*
- *Respond and generate questions*

Pre-AP Advanced Topics

- **Reading and evaluating fiction, non fiction, drama and poetry**
- *Inquiry based close reading and critical thinking*
- *Respond and generate questions*

AP American Literature and Composition

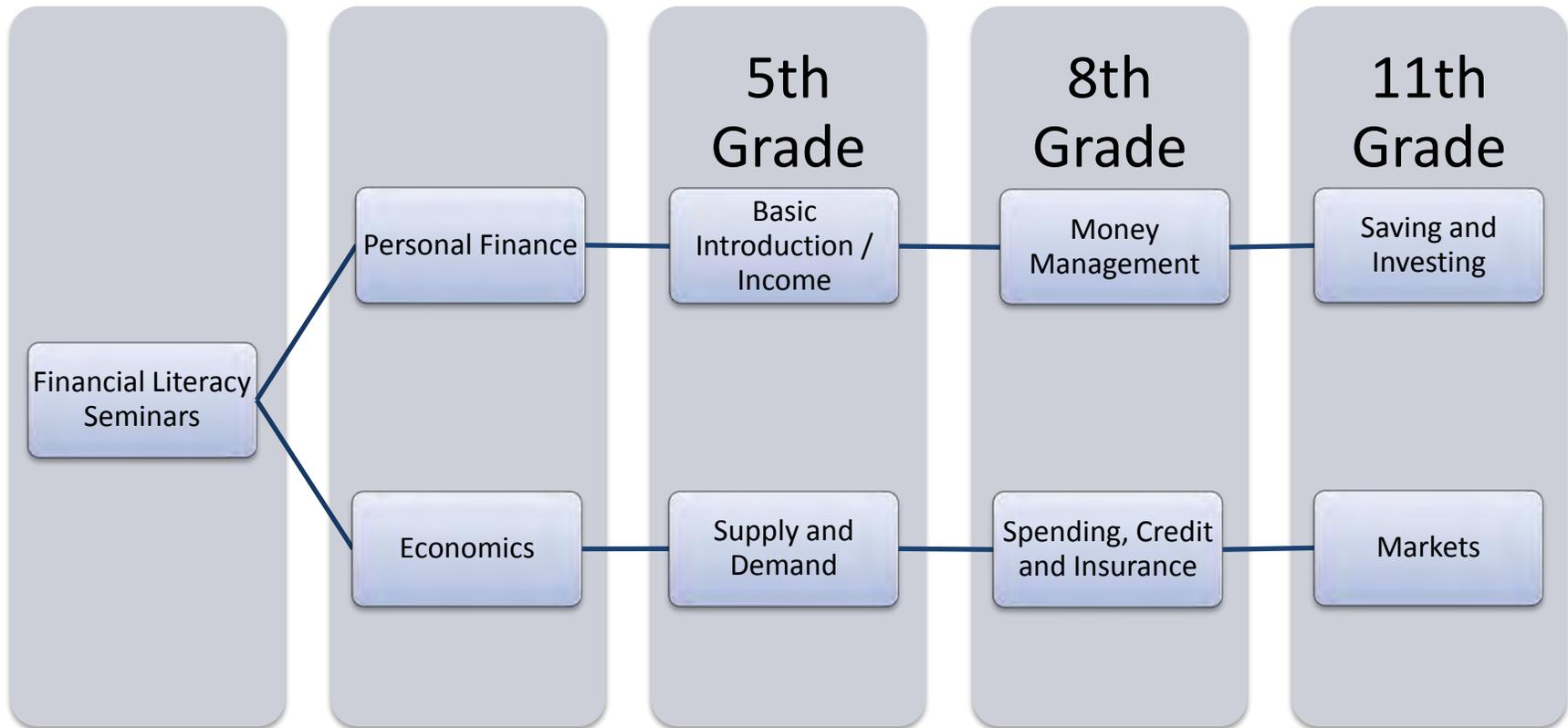
- **Reading and evaluating fiction, non fiction, drama and poetry**
- *Inquiry based close reading and critical thinking*
- *Respond and generate questions*
- *Understand a work's complexity, and analyze how that meaning is embodied in literary form*
- **Develop and apply literary analysis strategies**
- *Interactions among writers' purposes*
- *Audience expectations*
- *Written response and reaction exploring a text's underlying social and cultural values through analysis, interpretation, and argument*

AP Language and Composition

- **Develop and apply literary analysis strategies**
- *Interactions among writers' purposes*
- *Audience expectations*
- *Evaluate the processes used in recognizing and solving problems*
- *Examine rhetorical strategies and stylistic choices made by authors*
- *Produce expository, analytical, and argumentative compositions*
- *Demonstrate understanding and mastery of standard written English as well as stylistic maturity in their own writings*

Appendix A.2-3: Kauffman School Scope and Sequence (Financial and Technological Literacy)

Financial Literacy: Concept Flow Chart



Financial Literacy will be integrated throughout the school's curriculum and will receive focused attention through the school's FLASH program. The scope and sequence presented here is intended to present competencies students should possess by the end of critical grade levels (grades at which Kauffman students will be assessed for financial literacy). Only the first two of six overall competencies are presented here. The other four competencies are Planning and Money Management, Credit and Debt, Risk Management and Insurance, and Saving and Investing. This document is largely informed by the Jump\$tart Coalition for Personal Financial Literacy (www.jumpstart.org)

Financial Literacy Competency One: Financial Responsibility and Decision Making
(Apply reliable information and systematic decision making to personal financial decisions.)

Standard One: Take responsibility for personal financial decisions

5th Grade

- List examples of financial decisions and their possible consequences.
- Identify ways to be a financially responsible youth.

8th Grade

- Identify ways to be a financially responsible young adult.
- Give examples of the benefits of financial responsibility and the costs of financial irresponsibility.

11th Grade

- Explain how individuals demonstrate responsibility for financial well-being over a lifetime.
- Analyze how financial responsibility is different for individuals with and without dependents.
- Given a scenario, discuss ethical considerations of various personal finance decisions.

Financial Literacy Competency One: Financial Responsibility and Decision Making
(Apply reliable information and systematic decision making to personal financial decisions.)

Standard Two: Find and evaluate financial information from a variety of sources

5th Grade

- Give examples of situations in which financial information would lead to better decisions.
- Identify sources of financial information.

8th Grade

- Analyze and evaluate advertising claims.
- Identify online and printed sources of product information and list the strengths and weaknesses of each.

11th Grade

- Determine whether financial information is objective, accurate, and current.
- Investigate current types of consumer fraud, including online scams.
- Given a scenario, identify relevant financial information needed to make a decision.
- List factors to consider when selecting a financial planning/ counseling professional and legal/tax adviser.

Financial Literacy Competency One: Financial Responsibility and Decision Making
(Apply reliable information and systematic decision making to personal financial decisions.)

Standard Three: Summarize major consumer protection laws

5th Grade

- Compare product return policies at local retail stores.

8th Grade

- Research the primary consumer protection agency in the state of residence.
- Give examples of unfair or deceptive business practices that consumer protection laws forbid.
- Given a scenario, explain steps in resolving a consumer complaint.

11th Grade

- Match consumer protection laws to descriptions of the issues that they address and the safeguards that they provide.
- Research online and printed sources of up-to-date information about consumer rights.
- Given a scenario, write a complaint letter that states the problem, asks for specific action, includes copies of related documents, and provides contact information.

Financial Literacy Competency One: Financial Responsibility and Decision Making
(Apply reliable information and systematic decision making to personal financial decisions.)

Standard Four: Make financial decisions by systematically considering alternatives and consequences.

5th Grade

- Explain how limited personal financial resources affect the choices people make.
- Rank personal wants/needs in order of importance.
- Set measurable short-term financial goals.
- Outline the steps in systematically evaluating alternatives and making a decision.
- Apply systematic decision making to a short-term goal.

8th Grade

- Set measurable short- and medium-term financial goals.
- Prioritize personal financial goals.
- Evaluate the results of a financial decision.
- Use a financial or online calculator to determine the cost of achieving a medium-term goal.
- Apply systematic decision making to a medium-term goal.

11th Grade

- Set measurable short-, medium-, and long-term financial goals.
- Use a financial or online calculator to determine the cost of achieving a long-term goal.
- Apply systematic decision making to a long-term goal.
- Analyze how inflation affects financial decisions.
- Analyze how taxes affect financial decisions.
- Give examples of how decisions made today can affect future opportunities.

Financial Literacy Competency One: Financial Responsibility and Decision Making
(Apply reliable information and systematic decision making to personal financial decisions.)

Standard Five: Develop communications strategies for discussing financial issues.

5th Grade

- Give examples of how members of previous generations spent money as children.
- Analyze the values and attitudes of members of previous generations from their personal stories about money.

8th Grade

- Explain how discussing important financial matters with household members can help reduce conflict.
- Identify differences among peers' values and attitudes about money.

11th Grade

- Explain the value of discussing individual and shared financial responsibilities with a roommate before moving in.
- Discuss the pros and cons of sharing financial goals and personal finance information with a partner before combining households.
- Give examples of contracts between individuals and between individuals and businesses, and identify each party's basic responsibilities.

Financial Literacy Competency One: Financial Responsibility and Decision Making
(Apply reliable information and systematic decision making to personal financial decisions.)

Standard Six: Control personal information.

5th Grade

- List types of personal information that should not be disclosed to others and the possible consequences of doing so.

8th Grade

- List actions an individual can take to protect personal identity.
- Describe problems that occur when one is the victim of identity theft.
- Identify ways that thieves can fraudulently obtain personal information.

11th Grade

- List entities that have a right to obtain individual Social Security numbers.
- Recommend actions a victim of identity theft should take to restore personal security.

Financial Literacy Competency Two: Income and Careers
(Use a career plan to develop personal income potential.)

Standard One: Explore career options.

5th Grade

- Explain the difference between a career and a job and identify various jobs in the community.
- Give an example of how an individual's interests, knowledge, and abilities can affect career and job choice.
- Identify a topic of personal interest and research a career related to that topic of interest.
- Examine a job related to a career of interest.
- Give examples of entrepreneurs in the community.

8th Grade

- Give an example of how education and/or training can affect lifetime income.
- Identify online and printed sources of information about jobs, careers, and entrepreneurship.
- Compare personal skills and interests to various career options.
- Describe the educational/training requirements, income potential, and primary duties of at least two jobs of interest.
- Identify individuals who could provide a positive job reference.
- Complete an age-appropriate, part-time job application, including references.

11th Grade

- Describe the risks, costs, and rewards of starting a business.
- Outline the main components of a business plan.
- Analyze how economic, socialcultural, and political conditions can affect income and career potential.
- Identify a career goal and develop a plan and timetable for achieving it, including educational/training requirements, costs, and possible debt.

Financial Literacy Competency Two: Income and Careers
(Use a career plan to develop personal income potential.)

Standard Two: Identify sources of personal income.

5th Grade

- Explain the difference between a wage and a salary.
- Identify jobs children can do to earn money.
- Give examples of sources of income other than a wage or salary.

8th Grade

- Define gift, rent, interest, dividend, capital gain, tip, commission, and business profit income.
- Explain the difference between earned and unearned income and give an example of each.
- Give an example of a government transfer payment.
- Describe how a local government assistance program can benefit people in the community.

11th Grade

- Explain the effect of inflation on income.
- Use a financial or online calculator to determine the future income needed to maintain a current standard of living.

Financial Literacy Competency Two: Income and Careers
(Use a career plan to develop personal income potential.)

Standard Three: Describe factors affecting take-home pay.

5th Grade

- Define tax and explain the difference between sales and income taxes.
- Give an example of how government uses tax revenues.

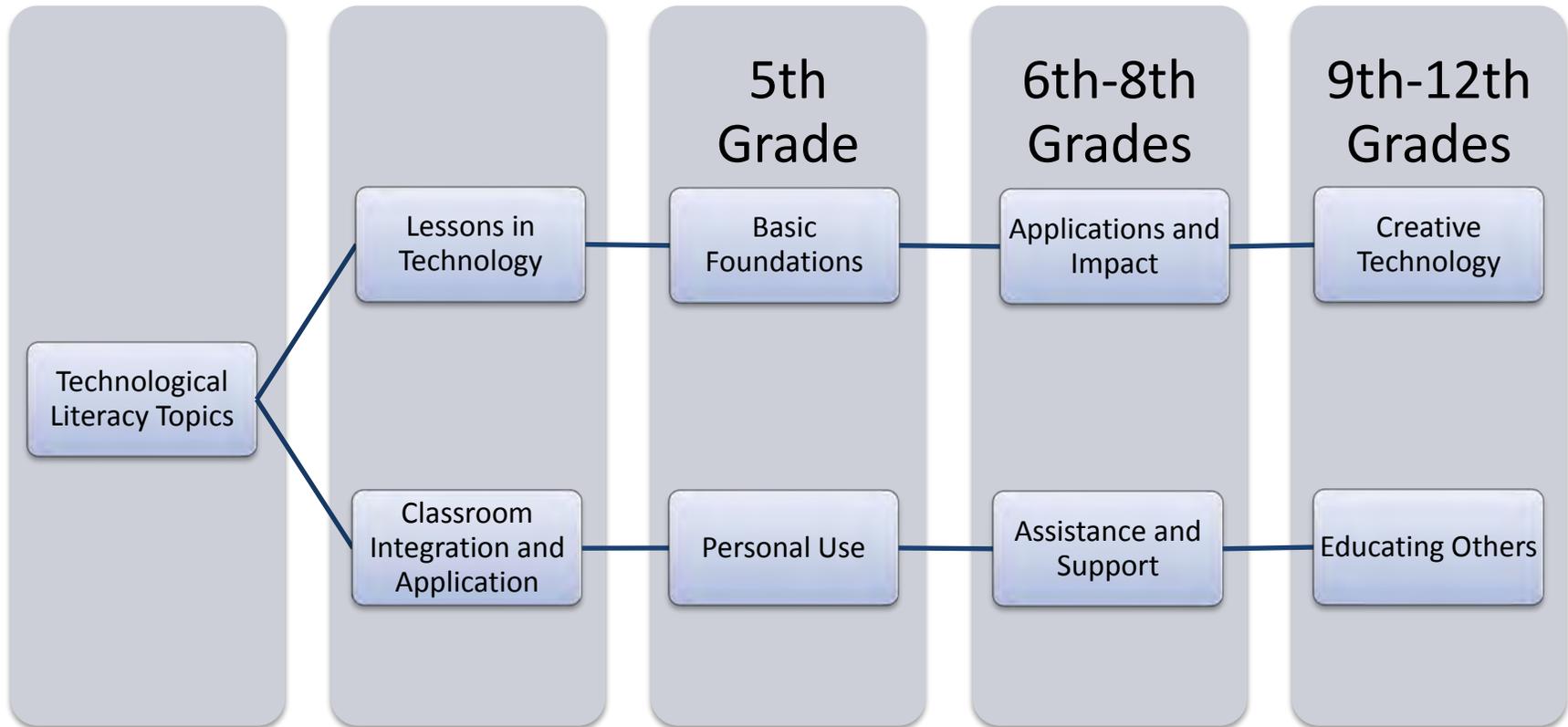
8th Grade

- Explain all items commonly withheld from gross pay.
- Give examples of employee benefits and explain why they are forms of compensation.
- Explain the difference between Social Security and Medicare programs.

11th Grade

- Explain the effect on take-home pay of changing the allowances claimed on an “Employee’s Withholding Allowance Certificate” (IRS form W-4).
- Transfer information on “Wage and Tax Statement” (IRS form W-2) and “Interest Income” (IRS form 1099-INT) to “U.S. Individual Income Tax Return” (IRS form 1040) and comparable state income tax form.
- Complete “Income Tax Return for Single and Joint Filers with No Dependents” (IRS form 1040EZ) and comparable state income tax form.
- Examine the benefits of employer-sponsored savings plans and other options for shifting current income to the future.

Technological Literacy: Concept Flow Chart



Technological Literacy will be integrated throughout the school's curriculum and will receive focused attention through the school's FLASH program. The scope and sequence presented here is intended to present topics students should cover as part of a seven-year continuum of study growing in complexity and sophistication. Only the first two of five general topics and benchmarks are presented here. The other three topic areas are Design, Abilities for a Technological World, and Designed World. This document is largely informed by the International Technology Education Association (ITEA).

Technological Literacy Topic One: Nature of Technology
Topic Benchmarks One: The Characteristics and Scope of Technology

5th Grade

- Things found in nature and in the human-made world.
- Tools, materials, and skills.
- Creative thinking.

6th - 8th Grades

- Usefulness of technology.
- Development of technology.
- Human creativity and motivation.
- Product demand.

9th - 12th Grades

- Nature of technology.
- Rate of technological diffusion.
- Goal-directed research.
- Commercialization of technology.

Technological Literacy Topic One: Nature of Technology
Topic Benchmarks Two: The Core Concepts of Technology

5th Grade

- Systems
- Resources
- Requirements
- Processes

6th - 8th Grades

- Systems
- Resources
- Requirements
- Trade-offs
- Processes
- Controls

9th - 12th Grades

- Systems
- Resources
- Requirements
- Optimization and trade-offs
- Processes
- Controls

Technological Literacy Topic One: Nature of Technology

Topic Benchmarks Three: The Relationships Among Technologies and the Connections Between Technology and Other Fields

5th Grade

- Technologies integrated.
- Relationships between technology and other fields of study.

6th - 8th Grades

- Interaction of systems.
- Interrelation of technological environments.
- Knowledge from other fields of study and technology.

9th - 12th Grades

- Technology transfer.
- Innovation and Invention.
- Knowledge protection and patents.
- Technological knowledge and advances of science and mathematics and vice versa.

Technological Literacy Topic Two: Technology and Society
Topic Benchmarks One: The Cultural, Social, Economic, and Political Effects of Technology

5th Grade

- Good and bad effects.
- Unintended consequences.

6th - 8th Grades

- Attitudes toward development and use.
- Impacts and consequences.
- Ethical issues.
- Influences on economy, politics, and culture.

9th - 12th Grades

- Rapid or gradual changes.
- Trade-offs and effects.
- Ethical implications.
- Cultural, social, economic, and political changes.

Technological Literacy Topic Two: Technology and Society
Topic Benchmarks Two: The Effects of Technology on the Environment

5th Grade

- Recycling and disposal of waste.
- Affects environment in good and bad ways.

6th - 8th Grades

- Management of waste.
- Technologies repair damage.
- Environmental vs. economic concerns.

9th - 12th Grades

- Conservation.
- Reduce resource use.
- Monitor environment.
- Alignment of natural and technological processes.
- Reduce negative consequences of technology.
- Decisions and trade-offs.

Technological Literacy Topic Two: Technology and Society
Topic Benchmarks Three: The Role of Society in the Development and Use of Technology

5th Grade

- Changing needs and wants.
- Expansion or limitation of development.

6th - 8th Grades

- Development driven by demands, values, and interests.
- Inventions and innovations.
- Social and cultural priorities.
- Acceptance and use of products and systems.

9th - 12th Grades

- Different cultures and technologies.
- Development decisions.
- Factors affecting designs and demands of technologies.

Technological Literacy Topic Two: Technology and Society
Topic Benchmarks Four: The Influence of Technology on History

5th Grade

- Tools for food, clothing, and protection.

6th - 8th Grades

- Processes of inventions and innovations.
- Specialization of labor.
- Evolution of techniques, measurement, and resources.
- Technological and scientific knowledge.

9th - 12th Grades

- Evolutionary development of technology.
- Dramatic changes in society.
- History of technology.
- Early technological history.
- The Iron Age
- The Middle Ages
- The Renaissance
- The Industrial Revolution
- The Information Age

Appendix A.2-4: Kauffman School Sample Lesson Plan (5th Grade Mathematics)

Course: Math 5

Lesson Topic: Adding and Subtracting Decimal Numbers

Overview

This lesson will provide students with the concept adding and subtracting decimal numbers. Students will also investigate place values as it relates to the concept of adding and subtracting decimals. Students will compare adding and subtracting whole numbers to adding and subtracting decimal numbers.

Standards and Objectives

National Standards:

- Understand numbers, ways of representing numbers, relationships among numbers, and number systems
- Compute fluently and make reasonable estimates

Missouri GLE:

- N1B Represent and use rational numbers
- N2B Describe effects of operations

Objectives:

- The student will identify place values and investigate the purpose.
- The student will add and subtract decimals by properly aligning place values.

Character Building

Unit Theme: TBD

Key Terms: TBD

Anticipatory Set

Teacher should ask students what is the difference in value between a penny and a dime. (Allow students to respond) Ask students if they would be okay with trading in all of their dimes for pennies. (Allow students to respond) Tell students to explain why they would not want to trade their pennies for dimes. Ask students how they would write 1 cent or 10 cents as a decimal. (0.01 and 0.10) Tell students that both numbers have the exact same digits, however the position of the decimal determines the value. The decimal separates the whole from the part. Its position in a number determines the value of that number. Tell the students that today they will be adding and subtracting decimal numbers.

Engagement Strategies

Working in pairs, students will solve a series of addition and subtraction problems involving whole numbers. (i.e. $11 + 3 = 14$) Ask why the sum of this problem was not 41. Guide the students to identify place values.

Key questions: Why is it important to line up the place values? Do we get the same answer if we do not line up the place values?

Tell students that the concept of lining up place values to perform the operations of addition and subtracting for whole numbers also applies to adding and subtracting decimals numbers. By lining up the decimals of the numbers in an addition or subtraction problem, you are ensuring proper place values.

In order to assist students in properly setting up the problems, teacher should provide students with graph paper. Have students use the grids to set up their problems.

Tell students that once the decimal numbers have been aligned using place values, the operations of adding and subtracting are the same as with whole numbers. However, once the computations are completed the decimal must appear in the sum or difference for the value to be correct. The decimal in the answer should line up with the decimals in the problem.

Key question: What happens if the decimal in the answer is not in the correct position?

After lining up the decimals, students should fill place value voids with zeros to aid in the computations.

Guided Practice:

Teacher will lead several sample problems at the board for students working in pairs to attempt. Students should attempt all problems.

Independent Practice:

Students should work independently on the practice problems.

Closure

Class discussion on procedure for adding and subtracting decimals.

Assessment

Initial assessment will be conducted during guided and independent practice.

Common assessment will be provided for this concept.

Student Resource # 1

Evaluate each expression.

1) $3.7 - 0.1$

2) $4.4 + 4.9$

3) $1.8 + 2.9$

4) $3.7 - 3.7$

5) $4.97 - 0.7$

6) $4.4 + 2.3$

7) $4.24 + 3.7$

8) $0.5 + 2.44$

9) $4.589 + 4.2$

10) $1.3 + 4.95$

11) $0.5 + 4.9$

12) $1.5 + 0.4$

13) $1.8 - 0.7$

14) $1.1 + 3.7$

15) $0.443 + 4.6$

16) $4 + 0.4$

17) $4.4 - 0.5$

18) $5 + 0.7$

19) $2.6 + 0.14$

20) $2.4 + 1.8$

21) $1.3 + 0.3$

22) $2.5 + 2.6$

23) $1.7 + 2.8$

24) $4.6 - 0.4$

25) $4.7 + 2.4$

26) $4.9 - 1.6$

27) $1.9 + 1.38$

28) $2.26 + 3.4$

29) $4.2 + 3.3$

30) $2.361 + 4.9$

31) $3.4 + 0.3$

32) $1.6 - 1.2$

33) $3.3 + 4.2$

34) $2 + 0.9$

35) $3.3 + 2.1$

36) $1.092 + 3.1$

-1-

Background Information:

Place Values - Expanded Form

Each digit of a number, such as 495,786, has a different place value name.

4 9 5,7 8 6

|__ digits' place value

|____ tens' place value

|_____ hundreds' place value

|_______ thousands' place value

|_____ ten-thousands' place value

|_____ hundred-thousands' place value

There are 4 sets of one hundred thousand, 9 sets of ten thousand, 5 sets of one thousand, 7 sets of one hundred, 8 sets of ten, and 6 ones in the number 495,786.

Expanded form shows the number expanded into an addition statement. The expanded form of 495,786 is $400,000 + 90,000 + 5,000 + 700 + 80 + 6$.

Place Values of Decimals

Decimal numbers, such as 0.6495, have four digits after the decimal point. Each digit is a different place value.

The first digit after the decimal point is called the tenths place value. There are six tenths in the number 0.6495.

The second digit tells you how many hundredths there are in the number. The number 0.6495 has four hundredths.

The third digit is the thousandths place.

The fourth digit is the ten-thousandths place which is five in this example.

Therefore, there are six tenths, four hundredths, nine thousandths, and five ten-thousandths in the number 0.6495.

http://www.321know.com/g51b_px1.htm

Appendix A.2-5: Kauffman School Sample Lesson Plan (9th Grade English)

Course: 9th Grade English

Lesson Topic: Going Deeper: Diving into Text- Reader's Workshop

Overview

Students will explore, identify, analyze, and evaluate different literature, media, and text focusing on literary elements and narrative text characteristics such as figurative language, imagery, sound devices, format, style, tone, point of view, metaphors, analogies, hyperbole, onomatopoeia, personification, idioms, imagery, and symbolism. Students will use technology in order to incorporate this figurative language into their writing. They will work on vocabulary and complete a few activities that demonstrate their ability to use figurative language to create imagery and vivid mental pictures. Students will be reminded to continue to think about and formulate their descriptive essay/creative writing activity. They will make connections between the figurative language tools and the creative writing activity. Students will analyze audience, voice and purpose for each form of writing to apply to own narrative text.

Standards and Objectives

Missouri GLE:

- R3.C Students will analyze and evaluate the author's use of information and logic to express his or her ideas through word choice, comprehensiveness of detail selection and organizational patterns.
- R3.0 Students will develop and apply strategies to comprehend, analyze and evaluate nonfiction.
- R3.B Students will analyze and evaluate author's use of figurative language, imagery and sound devices in nonfiction text.

Objectives:

- Students will be able to identify "voice," purpose and audience in each text.
- Students will identify, interpret, and analyze the use of figurative language, including similes, metaphors, analogies, hyperbole, onomatopoeia, personification, idioms, imagery, symbolism, etc. in different texts and media.
- Students will be able to make connections between music and figurative language in text.
- Students will be able to analyze poetry to identify and explain the use of figurative language to create vivid imagery.

- Students will be able to apply knowledge and understanding of figurative language and imagery to their personal narrative.

Character Building

Unit Theme: TBD

Key Terms: TBD

Anticipatory Set

Students, now that you have worked on prewriting and many of you will begin to draft your personal narrative during the next few weeks, I want to take some time to dive deeper into text and figurative language devices in order to analyze, learn, and understand how to incorporate vivid imagery into your writing. We will look at different texts, especially poetry to see how figurative language really helps a reader visualize the message the author is conveying. Now that you have brainstormed some ideas and began to organize these ideas into graphic organizers, I want to look at other examples of writing to see how we can apply figurative language devices and elements to our writing. I want you to think of your favorite poem or song. On a sheet of paper write your favorite part of the song or poem you love the most and explain what makes this piece of writing unique. With your shoulder partner, share your favorite song or poem and your thoughts around the text. (Provide 2 minutes for discussion) Today, we are going to explore different writing strategies authors use to make their writing unique.

Engagement Strategies

The first thing I want us to look at is the worksheet and definitions on the basics of figurative language (Student Resource # 1) We are going to spend the next 15 minutes working in teams of three to explain and teach the class about the different figurative language devices (Break class into groups of 3 and have each group choose as many devices as necessary to evenly distribute the work.) You can be as creative as you want with how you explain, define, and demonstrate your particular figurative language devices (Students can read the definition, recite some examples, act out, or explain their device using pictures/notes on the white board. Allow for each group to explain what they know about their device.

Guided Practice:

After each group is finished, pass out Student Resource # 2. Students, we are going to look at how some of these devices are used in writing. Not only are we going to look at how they are used, but analyze and discuss their use so we can apply these devices later on in our own writing. (Have a students read the poem out loud and then open up a class discussion on where figurative language is being used in the writing. Guide the students through each line and have the students look for and point out different figurative language devices in the poem) How do these devices help create vivid imagery? How do some of the sounds devices help create tone or voice? Does the purpose and message of the author seem clearer with vivid detail? Why or why not? Is it possible to use too much figurative language (i.e. symbolism, metaphor, etc)? How could an overuse or overload of figurative language take away from a message or purpose?

Read Aloud: Now that you all see the type of analysis and evaluation we are looking for I want you to listen to this audio and/or look at the text (peom) and see how many devices you can find in this clip. I want you to highlight in the text as many devices as you see and hear. Listen to the music and sound devices and look at the lyrics to highlight devices used in this piece. (Play audio clip a couple of times and have students individually highlight devices used in the text) What did you hear being used? What did you see as you listened to the clip? Did listening and reading at the same time make it easier to find figurative language? Why or why not? Did the music help you locate sound devices that were used? Why or why not? (Class or small groups discusses the questions). Pair small teams together to discuss and compare their findings.)

Guided Reading: (Provide a copy of My Access' 6 Point Narrative Writing Rubric— Student Resource # 3) Students, we will now ensure that we understand the rubric that will be used to assess your writing. As you notice, Language Use, Voice and Style is an area your writing will be assessed upon. (Explain rubric and help scholars understand each category of assessment) Voice, tone and style are elements of writing that often separate the good from the best. The best writings are not only on the mark for focus, organization, and development; they are also on target for the intended audience. Although these elements are more difficult to define and control, careful attention to role as writer and audience can help students to choose words carefully and appropriately. Using your rubric and the lyrics from the activity we just completed, how would you assess this area? Why would you give it that rating? Now that you have a better understanding of literary devices, voice, tone and style, I want you all to take some time to practice on your own.

Independent Practice:

Using the Narrative Wizard you have completed you will have the rest of the time we have together to start the first draft of your narrative. You are expected to make use of any five literary devices we have studied today.

Closure

Now that you have had some time to draft your narrative, I would like some volunteers to share some examples of literary devices you have used in your own writing. As your exit ticket, please choose 2 questions from the following list to answer before we resume our lesson: What is the purpose of figurative language? Why do authors and musicians use figurative language in their writing and lyrics? What are three devices most commonly used? Give me at least three examples of figurative language that could be used. (Oral/Written Review with students. Students should answer these out loud or on a piece of paper) Now that you understand figurative language a little better, we are going to expect that you apply this knowledge to your writing as you continue to draft your narrative. Many of you have great ideas but we need to add the vivid details and imagery that is going to convey your message clearly and precisely. Not only will the reader understand your purpose and message more clearly, your writing will come to life, contain voice, and stand out to the reader. You will truly learn to show reader's who you are instead of only telling them. This ability will help you create a personal narrative that is truly authentic and original.

Assessment

Writer's notebook and definitions and explanations of figurative language devices

Student Packets of text-highlighted and labeled examples of figurative language

Finding Figurative Language in Text Student Resource Sheet

Application of figurative language to student's narrative draft

Group discussion/ Oral and Written Review

Resource

Supplemental Resource:

Basics to Figurative Language Student Resource

Poems

My Access 6 Pt. Rubric

Background Information:

Technology:

Computer with speakers

Projector or white board

Student Resource # 1

Basics to FIGURATIVE LANGUAGE:

Sounds

ALLITERATION:

Repeated consonant sounds

"A bobbled ball bounced as the band blasted"

ASSONANCE:

Repeated Vowel sounds

"The June moon loomed over the horizon"

ONOMATOPOEIA:

Words sound like what they are

"The fire crackled and the popcorn popped."

"The bacon sizzled in the frying pan."

Imagery

METAPHORS:

Direct Comparison without using like or as

"She was an explosion of happiness"

SIMILE:

A comparison using "Like" or "as"

"He jumps like a kangaroo"

"He jumps as high as a kangaroo"

HYPERBOLE:

An exaggeration

"I sat in class for eternity, before I could finally go home."

PERSONIFICATION:

Making an inanimate object act like a person or animal

"The sun walked across the countryside as dawn approached."

ALLUSION:

A cross reference to another work of art

"Their love story, like Romeo and Juliet, was destined to fail."

SYNECDOCHE:

Using part of an object to stand for the whole thing

"Have you got your wheels, man?"

CONCEIT:

An extended metaphor that doesn't make sense at first. "My compass love for you is true."

(This John Donne conceit makes sense only when we realize he is talking about a drawing compass and he means his love is the center of his universe.)

PARADOX:

Something that at first seems to contradict itself

"A little learning is a dangerous thing."

SYMBOLISM:

Something represents a thought or idea

"The American flag represents freedom"

A lion and gazelle represent the Oppressor and the oppressed.

A Dream Deferred - *Langston Hughes*

What happens to a dream deferred?

Does it dry up

Like a raising in the sun?

Or fester like a sore -

And then run?

Does it stink like rotten meat?

Or crust and sugar over -

Like a syrupy sweet?

Maybe it just sags

Like a heavy load.

Or does it explode?

Dreams - *Langston Hughes*

Hold fast to dreams

For if dreams die

Life is a broken-winged bird

That cannot fly.

Hold fast to dreams

For when dreams go

Life is a barren field

Frozen with snow

The Negro Speaks of Rivers
by Langston Hughes

I've known rivers:
I've known rivers ancient as the world and older than the flow of human blood in human veins.

My soul has grown deep like the rivers.

I bathed in the Euphrates when dawns were young.
I built my hut near the Congo and it lulled me to sleep.
I looked up on the Nile and raised the pyramids above it.
I heard the singing of the Mississippi when Abe Lincoln went down to New Orleans,
and I've seen its muddy bosom turn all golden in the sunset.

I've known rivers:
Ancient, dusky rivers.

My soul has grown deep like the rivers.

MOTHER TO SON

by Langston Hughes

Well, son, I'll tell you:
Life for me ain't been no crystal stair.
It's had tacks in it,
And splinters,
And boards torn up,
And places with no carpet on the floor
- - - Bare.

But all the time
I've been a - climbin' on
And reachin' landin's,
And turnin' corners,
And sometimes goin' in the dark
Where there ain't been no light.

So boy, don't you turn back.
Don't you set down on the steps
'Cause you find it's kinder hard.
Don't you fall now - - -
For I've still goin' honey,
I've still climbin',
And life for me ain't been no crystal stair.

In the Event of My Demise
by Tupac Shakur

In the event of my Demise
when my heart can beat no more
I Hope I Die For A Principle
or A Belief that I had Lived 4
I will die Before My Time
Because I feel the shadow's Depth
so much I wanted 2 accomplish
before I reached my Death
I have come 2 grips with the possibility
and wiped the last tear from My eyes
I Loved All who were Positive
In the event of my Demise

The Rose That Grew From Concrete

Did you hear about the rose that grew
from a crack in the concrete?
Proving nature's law is wrong it
learned to walk with out having feet.
Funny it seems, but by keeping it's dreams,
it learned to breathe fresh air.
Long live the rose that grew from concrete
when no one else ever cared

Student Resource # 3 MY ACCESS!® 6-Point Narrative Holistic Rubric

Characteristics of Writing-Responses are evaluated on the basis of the following five characteristics of writing: Focus & Meaning, Content & Development, Organization, Language Use, Voice & Style, Mechanics & Conventions

6-The “6” response very effectively communicates the writer's message-

- Demonstrates a *thorough* understanding of the purpose, audience and task. Provides description and details that are all relevant to the story effectively develops arguments, using a wide variety of specific, *accurate, and relevant detail* to support the writer’s position.
- Demonstrates a cohesive and unified structure with an engaging introduction and a strong conclusion; effective use of paragraphing and transitional devices throughout.
- Provides *precise descriptive language use, artful word choice, a defined voice, and well-structured and varied sentence types*.
- Contains little or no errors in paragraphing, grammar and usage, punctuation, spelling, and mechanics.

5-The “5” response strongly communicates the writer’s message-

- Demonstrates a *general* understanding of the purpose, audience and task. Provides description and details that are all relevant to the story develops arguments using sufficient specific, *accurate and relevant* details to support the writer’s position.
- Demonstrates a mostly unified structure with a good introduction and conclusion; consistent use paragraphing and transitional devices.
- Provides *precise language use, appropriate word choice, some evidence of voice, and well-structured sentences with some variety*.
- Contains few errors in paragraphing, grammar and usage, punctuation, spelling, and mechanics.

4-The “4” response adequately communicates the writer's message-

- Demonstrates a *basic* understanding of the purpose, audience and task. Provides description and details that are relevant to the story develops arguments using some specific, accurate, and relevant details to support the writer’s position.
- Demonstrates a generally unified structure with a *noticeable introduction and conclusion*; inconsistent use of paragraphing and transitional devices.
- Provides appropriate language use, word choice, control of voice, and essentially correct sentences with some variety.
- Contains occasional errors in paragraphing, grammar and usage, punctuation, spelling, and mechanics, but the errors do not make comprehension difficult.

3-The “3” response partially communicates the writer's message-

- Demonstrates a *limited* understanding of the purpose, audience and task. Provides description and details that may not be relevant to the story develops arguments briefly and inconsistently, using insufficient details to support the writer’s position.
- Demonstrates evidence of structure with an uncertain introduction and conclusion; lacks paragraphing and some transitional devices contains simple language use, word choice, an awareness of voice, relies on simple sentences.
- Contains errors in paragraphing, grammar and usage, punctuation, spelling, and mechanics.

2-The “2” response is limited in communication of the writer's message-

- Demonstrates a *minimal* understanding of the purpose, audience and task. Provides description and details that may stray from the point of the story demonstrates little evidence of structure with a *poor* introduction and conclusion; little evidence of paragraphing and transitional devices.
- Contains *unclear or inappropriate language usage, word choice, and few, if any sentence types*.
- Contains serious errors in paragraphing, grammar and usage, punctuation, spelling, and mechanics (errors may make comprehension difficult).

1-The “1” response inadequately communicates the writer's message-

- Demonstrates *almost no* understanding of the purpose, audience and task. Provides *very little detail*, some of which may not be relevant to the story little or no attempt is made to use details to support the arguments and the writer’s position.
- Demonstrates *no evidence* of structure with no introduction or conclusion; no evidence of paragraphing and transitional devices.
- Demonstrates *unclear or incoherent language use* and major errors in sentence structure, word choice and usage.
- Major errors in paragraphing, grammar and usage, punctuation, spelling, and mechanics *significantly interfere* with the communication of the message.

COPYRIGHT © 2009 by Vantage Learning. All Rights Reserved. No part of this work may be used, accessed, reproduced or distributed in any form or by any means or stored in a database or any retrieval system, without the prior written permission of Vantage Learning. Revised 4/13/09.

Appendix A.4-1: 2011-12 Kauffman School Calendar

Ewing Marion Kauffman School

2011-2012 School Calendar

August 2011							September 2011							October 2011						
Su	M	Tu	W	Th	F	Sa	Su	M	Tu	W	Th	F	Sa	Su	M	Tu	W	Th	F	Sa
	1	2	3	4	5	6					1	2	3							1
7	8	9	10	11	12	13	4	5	6	7	8	9	10	2	3	4	5	6	7	8
14	15	16	17	18	19	20	11	12	13	14	15	16	17	9	10	11	12	13	14	15
21	22	23	24	25	26	27	18	19	20	21	22	23	24	16	17	18	19	20	21	22
28	29	30	31				25	26	27	28	29	30		23	24	25	26	27	28	29
														30	31					

November 2011							December 2011							January 2012						
Su	M	Tu	W	Th	F	Sa	Su	M	Tu	W	Th	F	Sa	Su	M	Tu	W	Th	F	Sa
		1	2	3	4	5					1	2	3	1	2	3	4	5	6	7
6	7	8	9	10	11	12	4	5	6	7	8	9	10	8	9	10	11	12	13	14
13	14	15	16	17	18	19	11	12	13	14	15	16	17	15	16	17	18	19	20	21
20	21	22	23	24	25	26	18	19	20	21	22	23	24	22	23	24	25	26	27	28
27	28	29	30				25	26	27	28	29	30	31	29	30	31				

February 2012							March 2012							April 2012						
Su	M	Tu	W	Th	F	Sa	Su	M	Tu	W	Th	F	Sa	Su	M	Tu	W	Th	F	Sa
			1	2	3	4					1	2	3	1	2	3	4	5	6	7
5	6	7	8	9	10	11	4	5	6	7	8	9	10	8	9	10	11	12	13	14
12	13	14	15	16	17	18	11	12	13	14	15	16	17	15	16	17	18	19	20	21
19	20	21	22	23	24	25	18	19	20	21	22	23	24	22	23	24	25	26	27	28
26	27	28	29				25	26	27	28	29	30	31	29	30					

May 2012							June 2012							July 2012						
Su	M	Tu	W	Th	F	Sa	Su	M	Tu	W	Th	F	Sa	Su	M	Tu	W	Th	F	Sa
		1	2	3	4	5						1	2	1	2	3	4	5	6	7
6	7	8	9	10	11	12	3	4	5	6	7	8	9	8	9	10	11	12	13	14
13	14	15	16	17	18	19	10	11	12	13	14	15	16	15	16	17	18	19	20	21
20	21	22	23	24	25	26	17	18	19	20	21	22	23	22	23	24	25	26	27	28
27	28	29	30	31			24	25	26	27	28	29	30	29	30	31				

- School Closed
- Early Release Day
- Employee Planning (no school for students)
- Last Day of Summer Session
- First and Last Day of School
- Parent Teacher Conferences
- Mandatory Summer School Days

Created using a template from Vertex42.com

Appendix A.4-2: Kauffman School Sample Daily Schedule (Grade 5)

Time	Title	Notes
7:15am – 7:45am	Arrival and Breakfast	School doors open, breakfast is served, students report to Advisory Classroom
7:45am – 7:50am	Passing Period	
7:50am – 8:10am	Morning Meeting	All middle school grades meet in common area
8:10am – 8:15am	Passing Period	
8:15am – 9:15am	5th Grade English: Reading and Writing Workshop	60 minutes / 60 minutes daily instructional total
9:15am – 9:20am	Passing Period	
9:20am – 10:20am	5th Grade Math: Skills and Concepts	60 minutes / 120 minutes daily instruction total
10:20am – 10:25am	Passing Period	
10:25am – 11:15am	5th Grade General Science	50 minutes / 170 minutes daily instruction total
11:15am – 11:20am	Passing Period	
11:20am – 11:35am	Lunch Served	
11:35am – 11:55am	Recreation	Outdoor recreation / Weather permitting
11:55am – 12:05pm	Extended Passing Period	
12:05pm – 1:05pm	5th Grade English: Language Arts	60 minutes / 230 minutes daily instruction total
1:05pm – 1:10pm	Passing Period	
1:10pm – 2:10pm	5th Grade Math: Analytical Problem Solving	60 minutes / 290 minutes daily instruction total
2:10pm – 2:15pm	Passing Period	
2:15pm – 3:05pm	5th Grade Social Studies	50 minutes / 340 minutes daily instruction total
3:05pm – 3:10pm	Passing Period	
3:10pm – 3:40pm	FLASH / World Language (afternoon snack provided)	30 minutes / 370 minutes daily instruction total
3:40pm – 3:45pm	Passing Period	
3:45pm – 4:35pm	FLASH / Enrichment: Art, Music, PE	50 minutes / 420 minutes daily instruction total
4:35pm – 4:45pm	Dismissal	
4:45pm – 5:45pm	Clubs, teams, and academic assistance	

Appendix A.4-3: Kauffman School Sample Daily Schedule (Grade 8)

Time	Title	Notes
7:15am – 7:45am	Arrival and Breakfast	School doors open, breakfast is served, students report to Advisory Classroom
7:45am – 7:50am	Passing Period	
7:50am – 8:10am	Morning Meeting	All middle school grades meet in common area
8:10am – 8:15am	Passing Period	
8:15am – 9:15am	8th Grade English: Pre-AP English Strategies	60 minutes / 60 minutes daily instructional total
9:15am – 9:20am	Passing Period	
9:20am – 10:20am	8th Grade Math: Algebra I	60 minutes / 120 minutes daily instruction total
10:20am – 10:25am	Passing Period	
10:25am – 11:15am	8th Grade Integrated Science	50 minutes / 170 minutes daily instruction total
11:15am – 11:20am	Passing Period	
11:20am – 12:20pm	8th Grade English: Advanced English	60 minutes / 230 minutes daily instruction total
12:20pm -12:25pm	Passing Period	
12:25pm – 12:45pm	Lunch	
12:45pm – 1:00pm	Recreation	Outdoor recreation / Weather permitting
1:00pm – 1:10pm	Extended Passing Period	
1:10pm – 2:10pm	8th Grade Math: Analytical Problem Solving	60 minutes / 290 minutes daily instruction total
2:10pm – 2:15pm	Passing Period	
2:15pm – 3:05pm	8th Grade Social Studies	50 minutes / 340 minutes daily instruction total
3:05pm – 3:10pm	Passing Period	
3:10pm – 3:40pm	FLASH / World Language (afternoon snack provided)	30 minutes / 370 minutes daily instruction total
3:40pm – 3:45pm	Passing Period	
3:45pm – 4:35pm	FLASH / Enrichment: Art, Music, PE	50 minutes / 420 minutes daily instruction total
4:35pm – 4:45pm	Dismissal	
4:45pm – 5:45pm	Clubs, teams, and academic assistance	

Appendix A.4-4: Kauffman School Sample Daily Schedule (Grade 9)

Time	Title	Notes
7:15am – 7:45am	Arrival and Breakfast	School doors open, breakfast is served, students report to Advisory Classroom
7:45am – 7:50am	Passing Period	
7:50am – 8:10am	Morning Meeting	All high school grades meet in common area
8:10am – 8:15am	Passing Period	
8:15am – 9:15am	9th Grade Math: Geometry	60 minutes / 60 minutes daily instructional total
9:15am – 9:20am	Passing Period	
9:20am – 10:20am	9th Grade English: Research and Writing Methods	60 minutes / 120 minutes daily instruction total
10:20am – 10:25am	Passing Period	
10:25am – 11:25am	9th Grade Biology	60 minutes / 180 minutes daily instruction total
11:25am – 11:30am	Passing Period	
11:30am – 12:00pm	Lunch	
12:00pm – 12:10pm	Extended Passing Period	
12:10pm – 1:10pm	9th Grade Social Studies: Government	60 minutes / 240 minutes daily instruction total
1:10pm – 1:15pm	Passing Period	
1:15pm – 2:15pm	FLASH	60 minutes / 300 minutes daily instruction total
2:15pm – 2:20pm	Passing Period	
2:20pm – 3:20pm	World Language	60 minutes / 360 minutes daily instruction total
3:20pm – 3:25pm	Passing Period	
3:25pm – 4:25pm	Electives / College Prep	60 minutes / 420 minutes daily instruction total
4:25pm – 4:45pm	Dismissal	
4:45pm – 5:45pm	Clubs, teams, and academic assistance	

Appendix A.8-1: Life Prep Assessment Options

360 Evaluations

- Consists of a student self-evaluation, as well as a teacher, parent and a student chosen "network" evaluation
- Evaluates students based on how others perceive them
- Helps with designing a plan/goals to help them become a more complete individual
- Gives teachers feedback in regards to growth outside of the classroom
- Questions and indicators are focused on life skills being taught in school
- Evaluators must be the same to maintain consistent and valid results

Service Learning Project

- "A teaching and learning strategy that integrates meaningful community service with instruction and reflection to enhance the learning experience, teach civic responsibility, and strengthen communities" (Corporation for National & Community Service)
- Learning in life prep becomes tangible through the completion of various projects and presentations

Multiple Intelligences Survey

- Identifies learning styles and preferences
- Tool can be used as an aid to understand overall personality preferences and strengths of a student
- Builds self-esteem by helping students discover their strengths
- Assists teachers in differentiating instruction
- Discovers areas where students might need to make more effort

Behavior Assessment System for Children - BASC (Adapted & Customized)

- BASC consists of 5 components: a self-report scale; a teacher rating scale; a parent rating scale; a structured developmental history; and a form for the recording and classifying of classroom observation
- BASC needs to be adapted and catered to the needs of the school
- It is used by medical professionals to diagnose maladaptive behavior, but a similar test can be created to evaluate behaviors associated with the skills being taught in life prep
- This tool is very similar to 360 evaluations but more comprehensive

360 Evaluations

- Measures:
 - Life prep skills and behaviors
 - Student growth as perceived by student, teacher, parent/guardian and "network" member
 - Understanding self as an individual and as a member of diverse local and global communities
 - Interacting with others in ways that respect individual and group differences
 - Applying personal and safety skills and coping strategies

Service Learning Project

- Measures:
 - Knowledge, life prep skills and behaviors
 - Summative assessment of the life skills taught throughout the semester
 - Understanding self as an individual and as a member of diverse local and global communities
 - Interacting with others in ways that respect individual and group differences
 - Applying personal and safety skills and coping strategies

Multiple Intelligences Survey

- Measures:
 - Learning styles, skills and behaviors
 - Understanding self as an individual and as a member of diverse local and global communities
 - Interacting with others in ways that respect individual and group differences
 - Applying personal and safety skills and coping strategies

Behavior Assessment System for Children - BASC (Adapted & Catered)

- Measures:
 - Life prep skills and behaviors
 - Evaluates adaptive and maladaptive behaviors, thoughts, and emotions of children and adolescents
 - Understanding self as an individual and as a member of diverse local and global communities
 - Interacting with others in ways that respect individual and group differences
 - Applying personal and safety skills and coping strategies

Appendix A.9-1: SAMPLE Kauffman School Student and Family Handbook Excerpt

SAMPLE Kauffman School Student and Family Handbook¹

School Contact Information

Name	Phone	E-mail
Main Office	816-555-1234	office@school.org
Attendance Hotline	816-555-1234	attendance@school.org
Executive Director's Office	816-555-1234	ED@school.org
Volunteer / Visitor Hotline	816-555-1234	visitors@school.org

Kauffman School Philosophy

The Ewing Marion Kauffman School prepares students to be intellectually curious, economically independent, and confidently self-directed. *Our students live life on purpose.* They learn not to be afraid to take calculated risks in pursuit of their aspirations and understand that a life devoid of failure is a life half-lived.

The Kauffman School is unrelentingly focused on the academic and social growth of our students. We know every student in our school. Our strength is our talented staff, which combines deep subject knowledge with the ability to motivate and inspire our students to realize their individual potential.

We will help each student identify his or her unique talents and abilities and how to apply them in the world. We provide our students with a rigorous education to enable each fully to compete in our nation's colleges and universities. Our students receive strong training in math and science; all students will learn a critical world language. Each student will be technologically and financially literate. Our students will be prepared to contribute to their local, national, and global communities.

We expect our students will have multiple careers over their lifetimes; some of the jobs they will hold do not yet exist. Since we cannot predict the future, we prepare our students for all potential futures. We accomplish this by making sure our students are able to think critically, embrace change, and take charge of their own learning in a rapidly changing world.

The few years we have with our students are brief. To achieve these goals requires us to maximize the quantity and quality of time we have together. This is a demanding school. Our doors are open to all students and families, though success will require strength and resolve to seize the opportunity we offer. We ask much of ourselves, our students, and our families. We need our students and families to match our intensity and dedication to their futures. In return, we commit ourselves to each student's academic and personal growth.

¹ This sample document contains policy examples and language developed by KIPP NYC College Prep, KIPP: Endeavor Academy, and Excel Academy (Boston, MA). Kauffman School leadership will develop the official student and family handbook during the start-up year, though the concepts presented in this abridged document reflect fundamental expectations of the Kauffman School and align to the model presented in the attached application.

Mission

The mission of the Kauffman School is to prepare students to excel academically, graduate college, and apply their unique talents in the world to create economically independent and personally fulfilling lives.

Vision for 2021

By 2021, the Kauffman School is recognized as the premier fully open public education option in the state of Missouri, and serves as a national model for the entire public school sector. The Kauffman School is graduating its third class of high school seniors, all of whom are accepted into the post-secondary programs aligned to their respective talents and secondary achievements. The entire school community shares a common purpose and set of values dedicated to building academic and personal skills in pursuit of meaningful and productive lives. Students at all grade levels are exposed to a wide range of contexts in both traditional and non-traditional subjects—engaging in robust science, math, and technology programs while also accessing a complementary menu of liberal arts options and life education courses. The hallways and other public areas of the school give evidence to high quality student work, statements and artwork exemplifying the school's philosophy, and reflections of the school's common mission and goals.

Students are able to articulate the philosophy and mission of the Kauffman School, and describe what it means in their current work and future plans. There is a clear sense among staff and students that academic success will not only open doors to personal fulfillment, but also help students understand the wide range of opportunities available to them when they are able to combine their academic acumen with their unique gifts and interests. In grade level exit surveys, students express an understanding of why academic rigor is important and how their personal passions can be applied to make positive contributions to the community, country, and world.

At least seventy-five percent of students in the middle school grades are assessed as proficient by the time they exit eighth grade, and all incoming ninth graders are assessed as proficient or advanced before beginning their secondary studies. Students in the middle school program are acculturated with the values and skills necessary to fully engage with secondary school curriculum and are already anticipating college attendance and building career plans. Upon graduation from the 9-12 program, all students have identified and been accepted into a post-secondary course of study aligned to both their academic achievements and personal interests. They are financially and technologically literate, understand and embrace the potential for ongoing change, and are prepared to be lifelong learners.

The Kauffman School leaves a distinguishable impression on its students, with each of them knowing how they are special and confidently considering ways in which their personal qualities will make a meaningful contribution to the world around them.

Master teachers matriculate into projects and programs outside the school, influencing the practice of education and disseminating innovative approaches to student success across the country. The school is regularly visited by district, charter, and private school representatives, as well as organizations interested in improving student outcomes. The Kauffman School is open with its research and seeks to share its effective practices with others, both locally and nationally.

Graduate Profile

A Kauffman School graduate...

- Is prepared for the academic and social rigors of college;
- Understands the wide range of opportunities available when academic acumen is combined with one's unique gifts and interests;
- Can manage personal finances and understands the importance of fiscal responsibility;
- Is accustomed to working hard and earning positive results;
- Understands life is uncertain, but demonstrates relentless pursuit of excellence in all endeavors;
- Is not only content with personal success, but also seeks to create opportunities in which others may succeed;
- Exhibits confidence in the ability to adapt as personal and professional circumstances change;
- Serves as a lifelong ambassador for the Kauffman School.

School Calendar

Summary of School Calendar

- First day of school for the 2011-12 academic year is August 1, 2011
- Students will not attend school every fourth Friday to allow for staff professional development and academic planning
- The school will observe all major holidays and provide Winter, Spring, and Summer holiday periods
- The regular school year ends May 4, 2012 (174 days)
- The mandatory extended summer session begins May 14, 2012
- The mandatory summer extension ends June 26, 2012 (30 summer days, 204 total days in extended school year)
- Summer holiday runs from June 27-July 31
- The school's six inclement weather redemption days include President's Day (third Monday in February) and May 7 – May 11 (week between regular and summer sessions)

2011-2012 School Calendar

Please see following page.

Ewing Marion Kauffman School

2011-2012 School Calendar

August 2011							September 2011							October 2011						
Su	M	Tu	W	Th	F	Sa	Su	M	Tu	W	Th	F	Sa	Su	M	Tu	W	Th	F	Sa
	1	2	3	4	5	6					1	2	3							1
7	8	9	10	11	12	13	4	5	6	7	8	9	10	2	3	4	5	6	7	8
14	15	16	17	18	19	20	11	12	13	14	15	16	17	9	10	11	12	13	14	15
21	22	23	24	25	26	27	18	19	20	21	22	23	24	16	17	18	19	20	21	22
28	29	30	31				25	26	27	28	29	30		23	24	25	26	27	28	29
														30	31					

November 2011							December 2011							January 2012						
Su	M	Tu	W	Th	F	Sa	Su	M	Tu	W	Th	F	Sa	Su	M	Tu	W	Th	F	Sa
											1	2	3							
6	7	8	9	10	11	12	4	5	6	7	8	9	10	8	9	10	11	12	13	14
13	14	15	16	17	18	19	11	12	13	14	15	16	17	15	16	17	18	19	20	21
20	21	22	23	24	25	26	18	19	20	21	22	23	24	22	23	24	25	26	27	28
27	28	29	30				25	26	27	28	29	30	31	29	30	31				

February 2012							March 2012							April 2012							
Su	M	Tu	W	Th	F	Sa	Su	M	Tu	W	Th	F	Sa	Su	M	Tu	W	Th	F	Sa	
				1	2	3	4					1	2	3							
5	6	7	8	9	10	11	4	5	6	7	8	9	10	8	9	10	11	12	13	14	
12	13	14	15	16	17	18	11	12	13	14	15	16	17	15	16	17	18	19	20	21	
19	20	21	22	23	24	25	18	19	20	21	22	23	24	22	23	24	25	26	27	28	
26	27	28	29				25	26	27	28	29	30	31	29	30						

May 2012							June 2012							July 2012						
Su	M	Tu	W	Th	F	Sa	Su	M	Tu	W	Th	F	Sa	Su	M	Tu	W	Th	F	Sa
												1	2							
6	7	8	9	10	11	12	3	4	5	6	7	8	9	1	2	3	4	5	6	7
13	14	15	16	17	18	19	10	11	12	13	14	15	16	8	9	10	11	12	13	14
20	21	22	23	24	25	26	17	18	19	20	21	22	23	15	16	17	18	19	20	21
27	28	29	30	31			24	25	26	27	28	29	30	22	23	24	25	26	27	28
														29	30	31				

-  School Closed
-  Early Release Day
-  Employee Planning (no school for students)
-  Last Day of Summer Session
-  First and Last Day of School
-  Parent Teacher Conferences
-  Mandatory Summer School Days

Created using a template from Vertex42.com

Daily Schedule – Sample Fifth Grade School Day

Time	Title	Notes
7:15am – 7:45am	Arrival and Breakfast	School doors open, breakfast is served, students report to Advisory Classroom
7:45am – 7:50am	Passing Period	
7:50am – 8:10am	Morning Meeting	All middle school grades meet in common area
8:10am – 8:15am	Passing Period	
8:15am – 9:15am	5 th Grade English: Reading and Writing Workshop	60 minutes / 60 minutes daily instructional total
9:15am – 9:20am	Passing Period	
9:20am – 10:20am	5 th Grade Math: Skills and Concepts	60 minutes / 120 minutes daily instruction total
10:20am – 10:25am	Passing Period	
10:25am – 11:15am	5 th Grade General Science	50 minutes / 170 minutes daily instruction total
11:15am – 11:20am	Passing Period	
11:20am – 11:35am	Lunch Served	
11:35am – 11:55am	Recreation	Outdoor recreation / Weather permitting
11:55am – 12:05pm	Extended Passing Period	
12:05pm – 1:05pm	5 th Grade English: Language Arts	60 minutes / 230 minutes daily instruction total
1:05pm – 1:10pm	Passing Period	
1:10pm – 2:10pm	5 th Grade Math: Analytical Problem Solving	60 minutes / 290 minutes daily instruction total
2:10pm – 2:15pm	Passing Period	
2:15pm – 3:05pm	5 th Grade Social Studies	50 minutes / 340 minutes daily instruction total
3:05pm – 3:10pm	Passing Period	
3:10pm – 3:40pm	FLASH / World Language (afternoon snack provided)	30 minutes / 370 minutes daily instruction total
3:40pm – 3:45pm	Passing Period	
3:45pm – 4:35pm	FLASH / Enrichment: Art, Music, PE	50 minutes / 420 minutes daily instruction total
4:35pm – 4:45pm	Dismissal	
4:45pm – 5:45pm	Clubs, teams, and academic assistance	

School Closing

If the Kansas City Missouri, School District is closed due to bad weather, the Kauffman School will also close. Our school closures will be announced on all local radio and television stations.

In the event weather conditions become hazardous during the school day, The Kauffman School will contact parents/guardians and send students home on the bus. If students are

walkers or car riders, parents/guardians are responsible for arranging transportation for their child. The school's six inclement weather redemption days include President's Day (third Monday in February) and May 7 – May 11 (week between regular and summer sessions).

Staff Contact List (Sample)

Name	Position Title	Mobile Phone	E-mail
Adams, J.	5 th Grade Science Teacher	816-555-1234	teacher@school.org
Baker, M.	Executive Director	816-555-1234	leader@school.org
Smith, A.	6 th Grade Math Teacher	816-555-1234	teacher@school.org
Xavier, Y	Director of Curriculum and Instruction	816-555-1234	teacher@school.org

Lunch and Breakfast Forms

Prior to the start of the school year, all families must fill out a federal free/reduced lunch form. Families that qualify will receive a free/reduced pricing for lunch.

Health and Immunization Information

Each student must have a certificate of immunization at the time of registration or no later than October 1, 2011. The Kauffman School requires all students to have all required immunizations and vaccinations. Before a child can be permitted to enter and attend school (subject to the initial waiver requirement), parents or guardians must present documentation that their child has received all required doses of vaccines or that their child has received at least one dose of each of the required vaccines and is waiting to receive the subsequent doses at the appropriate time intervals.

Promotion and Graduation Standards

The Kauffman School's philosophy and dedication to student success suggests that whether through promotion of students already attending the school or via enrollment of students beyond the fifth grade entry point, the Kauffman School will not place a student at a particular grade level if he/she is not academically equipped to be successful with the curriculum at that grade level. The Kauffman School will enroll any student of appropriate age living within the KCMSD boundaries, but will assess a student's incoming academic level once that student is enrolled to determine at which grade level he/she will best be able to master content and ultimately reach their full academic potential. All students will receive focused individual attention to help them reach their academic and personal goals, particularly those requiring extensive remediation or intensive support. Special needs populations will be assessed in accordance with state and federal policy when determining promotion and placement. The Kauffman School will also communicate clearly and consistently with parents/guardians regarding promotion and placement policies to ensure all parties understand the reasoning behind any decision and can view the best interests of the student in proper context.

Attendance

The Kauffman School believes students need to be at school daily to maximize their learning opportunities. We strongly request that students and their parents/guardians make every effort possible to minimize the number of days they miss school. The school will open for breakfast at 7:15am and continue serving until 7:45am. The school day begins at 7:50am and ends at 4:35pm. Students should arrive at school by 7:45am to ensure they will be in their first period class by 7:50am.

As a college preparatory school, regular classroom attendance is an absolute necessity in order to build the habits of accountability and responsibility needed in college and throughout life. Classroom instructional time is invaluable to preparing for the demands of college and work. Making up missed assignments, while required, cannot replace classroom time. Therefore, we strongly encourage that students and their parents/guardians make every effort possible to minimize the number of absences.

Excused Absences

Daily attendance in school is required. The only absences that are considered excused are:

- Personal illness
- Death of a family member
- Serious family emergencies (subject to Executive Director approval)
- Court summons
- School approved activity
- Religious holiday
- Medical appointments
 - If regular doctor, dentist, or other non-urgent appointments need to be made, the expectation is for every attempt to be made to schedule appointments after school, or on early dismissal or Friday teacher development days.

For an excused absence, parents/guardians must notify the Kauffman School by 8:15am of each day the student is absent. When the student returns to school, he/she must bring a note signed by a parent/guardian to the main office. The note must be written clearly in ink and contain the following information:

- Full name of the student
- Date(s) or time of absence
- Specific reason for absence
- Telephone numbers where parents/guardians may be reached (home and work)
- Signature of parent/guardian

Any student who is absent with an illness for four or more days must bring an official note signed by a doctor to the main office when they return to school. The note must include the name of the student, dates of absence and reason for absence. The note must be written clearly in ink on a doctor's letterhead.

Unexcused Absences

If a student does not arrive at school or class and the school has not received notification of the absence from a parent/guardian, the parent/guardian will be contacted immediately. If students

are absent frequently (excused or unexcused), a letter of concern will be sent home and if the absences continue, a parent/guardian conference will be called to discuss a solution to the problem. The following are some examples of what will be considered unexcused absences:

- Family trips
- Non-school related activities (e.g. sporting events, cultural activities, celebrations, performances)
- Truancy (non-attendance)

Any student who is absent from school without the permission of a parent or guardian and/or without the knowledge and permission of the Kauffman School is considered truant.

Tardiness

Lateness to school and to class will not be tolerated. School begins each day at 7:50am, and students must arrive in the building by 7:45am. If a student is going to be tardy, he/she must notify the attendance office manager. Upon late arrival, the student must sign in/swipe with his/her ID cards. Five late arrivals to school will equal one unexcused absence. Additionally, lateness to class is unacceptable. Any student who arrives late to class without a pass will be subject to disciplinary actions determined by the teacher and may receive Detention. Individual teachers in collaboration with the Director of Curriculum and Instruction will determine additional consequences for students who demonstrate habitual tardiness.

Fire Drills/ Natural Disasters

Posted in every room is a map detailing evacuation protocol. Students are to follow their teacher outside in the event of a fire drill, fire, or natural disaster and to stay with their class. Students must not stop at the restrooms or lockers. They must proceed directly to the designated area and wait for instructions. Any student violating this procedure is jeopardizing the safety of our school and will face consequences including possible expulsion. *There is to be no talking during a fire drill.*

City-wide Emergencies

In the event of a city-wide emergency, Kauffman School staff will hold all students in the school building or evacuate students to a safe building. Parents/guardians should contact the school to arrange transportation for students. If city telephone lines are down or contact with the school is difficult, parents/guardians should contact Kauffman School staff via their cell phones.

Family Involvement

Parent/Guardian, Student, Teacher Conferences

Both parent/guardian and child must attend conferences with teachers to go over the student's quarterly report card. If you are unable to attend a scheduled Parent/Guardian-Teacher conference, you must contact the Director of Curriculum and Instruction to arrange for an alternate time.

Procedure for Parent/Guardian Concerns

If a parent/guardian has a concern or disagreement, he/she should discuss the matter with the teacher and attempt to resolve the disagreement through informal discussion. If there is no resolution to the problem, the parent/guardian should then contact the Kauffman School. The

Executive Director will mediate the problem with all parties involved. If the matter is still not resolved satisfactorily, the parent/guardian may contact the Kauffman School Board of Trustees.

Academic Policies

Academic Philosophy: The Kauffman School's Educational Philosophy has its roots in the school's overall philosophy and purpose – to prepare students to excel academically, graduate college, and apply their unique talents in the world to create economically independent and personally fulfilling lives. In order to fulfill its purpose, the Kauffman School's academic program needs to be focused, well-executed, and innovative in practical ways to drive measurable improvement over consecutive years.

Intense academic growth is essential in grades five through eight to ensure that students are on grade-level before entering the high school program. Close tracking of measurable outcomes in the middle school grades is focused on preparation for high school. Close tracking of measurable outcomes in the high school is focused on ensuring students are viable candidates for competitive college and university admissions, and that they will be fully prepared for success in such institutions.

Core curriculum will align with state and national standards to set a baseline for achievement. Assessments will target cumulative content mastery throughout the year, annual academic growth, and growth to state proficiency standards over time. Whether through promotion of students already attending the school or via enrollment of students beyond the fifth grade entry point, the Kauffman School will not place a student at a particular grade level if he/she is not academically equipped to be successful with the curriculum at that grade level. All students will receive focused individual attention to help them reach their academic and personal goals, particularly students with special needs or who are identified as English Language Learners.

In order to be prepared for both college and life success in a rapidly changing world, financial competency and an understanding of technological concepts and applications are essential. Financial and technological literacy will be vital components of the entire academic program at the Kauffman School.

Students at the Kauffman School will also be immersed in robust college and life preparation curriculum. Exposure to a broad range of non-traditional subjects through enrichment and FLASH courses will help students explore personal interests and passions, while providing opportunities often reserved for the most elite public and private schools.

Curriculum Overview: The Kauffman School's curriculum is driven by clear performance standards for what students should know and be able to do at each grade level to be successful in the college prep program and college itself. For each grade level, standards are based on national and state curriculum frameworks. Teachers will use regular assessments to measure how well students are mastering the standards. Kauffman School teachers use data from these assessments to better understand student skills and shape whole class instruction, small group work, and one-on-one intervention. Using individual student data, instruction can be targeted to better meet individual student needs. Students at the Kauffman School will take all city and state-mandated tests. Students will also be tested and quizzed in the various core content areas. There will be weekly quizzes in each subject area. Teachers will give students and parents/guardians ongoing feedback about student performance. Parents/guardians should feel free to contact any of their children's teachers regarding progress at any time.

Summer School: Summer session at the Kauffman School is mandatory for all students. Core subjects as well as enrichment activities will be part of summer curriculum. In order to prepare students as well as possible for success in life and college, extended time in school each day and throughout the year is required. Transportation and student meals will be provided in the summer session.

Code of Conduct

Uniform Policy: Students are expected to observe the Kauffman School dress code Monday-Friday during the regular school year and summer session. The Kauffman School uniform consists of: Khaki or black pants or skirt, a Kauffman School dress shirt, and school tie for special occasions. Financial assistance is available to ensure all students are able to wear their school uniform with pride. Please contact the Executive Director regarding uniform assistance.

The following additional dress code rules apply at the Kauffman School:

- 1) Shirts should be tucked in at all times
- 2) All pants must fit around the waist. **Clothing with loops should be worn with a belt.**
- 3) Pants may not be excessively baggy and may not cover the shoes
- 4) Students may not wear inappropriately tight or short shirts, pants, shorts, or skirts.
- 5) Students may not wear hats, caps, do-rags, bandanas, or other head coverings in the school. If students have religious requirements for wearing head covering, this will be permitted.
- 6) For safety reasons the following jewelry will not be permitted at the Kauffman School: chokers, multiple finger rings, multiple bracelets, toe rings, and large dangling earrings (larger than 1 inch).
- 7) Students in the middle grades may not wear make-up
- 8) For insurance and safety reasons, students may not wear open-toed sandals, or open-heeled shoes.

Personal Belongings: Students are not allowed to have the following items during the school day at the Kauffman School:

- Gum
- Candy
- Soda
- Any illegal or controlled substance
- Weapons and toy weapons
- Stuffed animals or dolls
- Electronic gaming systems
- Radio, Walkman, or MP3 Player
- Beepers
- Cellular phones
- Excessive cash other than lunch money, field trip money, money for transportation, or book order money.

If a student is found to have any of these items at school, the item will be confiscated by a Kauffman School staff member. These items will be returned to the parent/guardian at the school's discretion.

Human Rights Policy

The Kauffman School brings together a diverse group of individuals. It is guided by the principle that respect and consideration for all individuals is foremost in all school activities. It is unlawful to discriminate against any individual based on race, color, religion, sex, nationality, sexual orientation, age, or handicap status. The Kauffman School is not only obligated to uphold the law concerning equal opportunity, but regards the spirit of these laws as part of its core values. The Kauffman School wishes to stress that it is the responsibility of every

Student Suspension and Expulsion Policies

PLEASE NOTE: "Short-term suspensions" shall refer to the removal of a student from school for disciplinary reasons for a period of three or fewer days. "Long-term suspensions" shall refer to the removal of a student from school for disciplinary reasons for a period of more than three but less than 10 days. "Expulsions" shall refer to the permanent removal of a student from school for disciplinary reasons.

PLEASE NOTE: All aspects of student discipline, suspension, and expulsion policies will comply with state and federal law, including applicable statutory components of the Missouri Safe Schools Act found in R.S.Mo 160, 161, 167, 170, 195, 211, 304, 565, and 571.

Short-Term Suspensions

A student who has committed any of the infractions listed below will be subject minimally to a short-term suspension, unless the Executive Director determines that an exception will be made based on the individual circumstances of the incident and the student's disciplinary record. Depending upon the severity of the infraction, the student may be subject to a long-term suspension, expulsion, or referral to the appropriate law enforcement agencies.

Short-Term Suspension Disciplinary Infractions

- Attempt to assault any student or staff member
- Vandalize school property causing minor damage
- Endanger the physical safety of another by the use of force or threats of force that reasonably place the victim in fear of imminent bodily injury
- Engage in conduct which disrupts school or classroom activity or endanger or threaten to endanger the health, safety, welfare, or morals of others
- Engage in insubordination
- Fail to complete assignments, carry out directions, or comply with disciplinary sanctions
- Cheat on quizzes, exams, or commit plagiarism
- Use forged notes or excuses
- Steal, or attempt to steal, or possess property known by the student to be stolen
- Commit extortion
- Engage in gambling
- Abuse school property or equipment
- Use obscene or abusive language or gestures
- Engage in acts of verbal or physical sexual harassment
- Make a false bomb threat or pull a false emergency alarm
- Possess tobacco
- Possess pagers, beepers, or portable/cellular telephones not being used for instructional purposes

- Wear inappropriate, insufficient, or disruptive clothing or attire, or violate the student dress code
- Commit any other act which school officials reasonably conclude disrupts the learning environment of the school
- Repeatedly commit minor behavioral infractions which, in aggregate, may be considered an infraction subject to formal disciplinary action.

Procedures for Short-Term Suspension

The Executive Director may impose a short-term suspension after conferring with the relevant staff members. Before imposing a short-term suspension, the Executive Director will verbally inform the student of the suspension, the reason for it, and whether it will be served in school or out of school. The student will be given an opportunity to deny or explain charges.

Short-Term Suspension Procedures and Due Process The Executive Director will immediately notify the parent(s) or guardian(s) in writing that the student has been suspended from school. Written notice will be provided by personal delivery, express mail delivery, or equivalent means reasonably calculated to assure receipt of such notice within 24 hours of suspension at the last known address. Where possible, notification also will be provided by telephone if the school has been provided with a contact telephone number for the parent(s) or guardian(s).

Such notice will provide a description of the incident or incidents which resulted in the suspension and will offer the opportunity for an immediate informal conference with the Executive Director. The notification and informal conference will be in the dominant language used by the parent(s) or guardian(s). While parents/guardians will have the freedom to disagree with any short-term suspension imposed by the Executive Director, parents/guardians will not have the right or ability to overturn any short-term suspension decision rendered by the Executive Director.

Long-Term Suspensions

A student who is determined to have committed any of the infractions listed below shall be subject *minimally* to a long-term suspension and perhaps expulsion, unless the Executive Director determines that an exception should be made based on the circumstance of the incident and the student's disciplinary record. Such a student may also be subject to any of the disciplinary measures outlined elsewhere in this document including a referral to the appropriate law enforcement authorities.

Long-Term Suspension Disciplinary Infractions

- Possess, use, attempt to use, or transfer of any firearm, knife, razor blade, explosive, mace, tear gas, or other dangerous object of no reasonable use to the student in school
- Commit, or attempt to commit arson on school property
- Possess, sell, distribute or use any controlled substance, imitation controlled substance, or marijuana on school property or at school sponsored events
- Vandalize school property causing major damage
- Commit any act which school officials reasonably conclude warrants a long-term suspension

In addition, a student who commits any of the acts previously described as causes for short term suspension may, instead or in addition, be subject to a long-term suspension at the Executive Director's discretion.

Procedures and Due Process

The Kauffman School may impose a long-term suspension though such a suspension may be imposed only after the student has been found guilty at an informal long-term suspension hearing. Upon determining that the student's actions may warrant a possible long-term suspension, the Executive Director will verbally inform the student that he or she is being considered for a long-term suspension (or expulsion) and state the reasons for such actions. The Executive Director will then immediately notify the student's parent(s) or guardian(s) in writing. Written notice will be provided by personal delivery, express mail delivery, or equivalent means reasonably calculated to assure receipt of such notice within 24 hours of suspension at the last known address. Where possible, notification also will be provided by telephone if the school has been provided with a contact telephone number for the parent(s) or guardian(s). Such notice will provide a description of the incident or incidents which resulted in a long-term suspension and will notify the parent(s) or guardian(s) of the time and date of an informal conference with the Executive Director. The notification and informal conference will be in the dominant language used by the parent(s) or guardian(s). The informal hearing is held to bring forth all relevant information regarding the event for which the student may be suspended and for students, their parent(s) or guardian(s) and school officials to discuss ways by which future offenses may be avoided. (Note that informal hearings are required for long-term suspensions only, not their short-term counterpart.) At the informal hearing, the student will have the right to be represented by counsel (at their own expense), to question witnesses, and to speak and present evidence. The Executive Director and all members of the staff that were involved in witnessing the alleged discipline violation are required to participate in the informal hearing. A decision by the Executive Director will stand as the final decision regarding the student's long-term suspension status.

Expulsions

Additionally, the Executive Director may decide that the infraction does not warrant a long-term suspension, but instead warrants an escalation in punishment: expulsion. Should the Executive Director recommend that an expulsion is required, he or she will follow the same procedures for a long-term suspension with the exception that a formal hearing shall be held. Written notice of the charges and the time and date of the formal hearing shall be sent to a student's parent(s) or guardian(s). The formal hearing will occur no earlier than 3 days after receipt of the notice. The formal expulsion hearing will be held in private, unless the student or parent(s) or guardian(s) request a public hearing. All expulsion hearings will be held before and will be subject to a majority vote, affirmative decision by the Kauffman School Board of Trustees.

Zero Tolerance Expulsion Policy for Fighting, Weapons, Drugs and Alcohol

The Kauffman School has a "zero-tolerance, one-strike" policy for all fighting, weapons, drugs and alcohol brought on school grounds. Any student found guilty of fighting or bringing any weapons, drugs or alcohol to school, will be recommended for swift expulsion to the President of the Board of Trustees by the Executive Director. If the Executive Director is able to provide convincing evidence that the student assaulted another student or staff member, intentionally caused physical injury to another person, except when student's actions are reasonably necessary to protect him or herself from injury, brought alcohol, drugs or a weapon to the school, the President of the Board of Trustees shall immediately recommend that the student be expelled from the school. (The Federal Gun-Free Schools Act of 1994, which applies to public schools, states that a student who is determined to have brought a weapon to school must be suspended for at least one calendar year. Weapon as used in this law means "firearm," as defined by 18 USC §3214(3)(d) effectuates this federal law.)

Alternate Instruction

Students who are suspended will be provided with alternative instruction. All suspensions and alternative instruction will be effectuated substantively and procedurally in accordance with State education requirements and Federal law. Prior to the school's first day of school, the Executive Director and the staff will develop a plan for alternate instruction that accommodates various scenarios depending on the reasons why alternate instruction is required in the first place. Arrangements will be made between the school and each individual family for the delivery of services, pick-up/delivery of work, and the making up of any missed assignments and classroom instructional support. All IDEA mandates will be followed for student with disabilities. Prior to their child's enrollment at the Kauffman School, all parents/guardians and students will be required to read and sign, in the presence of a Kauffman School staff member, the zero-tolerance for fighting contract.

Signature Page

I do hereby attest to having received the Kauffman School Student & Family Handbook for the 2011-2012 school year.

Student's Name: _____

Student's Signature: _____

Date: _____

Parent's / Guardian's Name: _____

Parent's / Guardian's Signature: _____

Date: _____

Appendix B.1-1: Articles of Incorporation

State of Missouri
Creation - NonProfit 4 Page(s)



T1005521002

File Number:
N01038240
Date Filed: 02/24/2010
Robin Carnahan
Secretary of State

**ARTICLES OF INCORPORATION
OF
EWING MARION KAUFFMAN SCHOOL, INC.**
a Missouri Nonprofit Corporation

Article I: Name of Corporation

The name of the Corporation is Ewing Marion Kauffman School, Inc. (the "Corporation").

Article II: Public Benefit Corporation

The Corporation is a public benefit corporation.

Article III: Duration

The period of duration of the Corporation is perpetual.

Article IV: Registered Agent

The address of its Registered Office in the State of Missouri is 120 South Central Avenue, Suite 400, Clayton, MO 63105, and the name of its Registered Agent at said address is CT Corporation *System*.

Article V: Purposes

The Corporation is organized exclusively for charitable, religious, educational and scientific purposes within the meaning of Sections 501(c)(3), 170(c)(2)(B), 2055(a)(2) and 2522(a)(2) of the Internal Revenue Code of 1986, as amended or the corresponding section of any future federal tax code (the "Code"), specifically to develop, manage, and operate charter schools of excellence with a focus on serving the educational needs of at risk students and a goal of preparing its students to succeed in and graduate from college.

To enable the Corporation to carry out such purposes, it shall have the power to do any and all lawful acts and to engage in any and all lawful activities, directly or indirectly, alone or in conjunction with others, which may be necessary, proper or suitable for the attainment of any of the purposes for which the Corporation is organized, and to that end:

- a. To take, accept, hold and acquire by bequest, devise, gift, purchase, loan or lease any property, real or personal, whether tangible or intangible, without limitation as to kind, amount or value.
- b. To sell, convey, lease or make loans, grants or pledges of any such property, or any interest therein or proceeds therefrom, and to invest and reinvest the principal thereof and receipts therefrom, if any.

21430533V-1
H:\Legal\Affiliates\Charter School\Articles of Incorporation 2010-02-18 (bd).doc

c. To borrow money upon and pledge or mortgage any such property for any purpose for which it is organized, and to issue notes, bonds or other forms of indebtedness to secure any of its obligations.

d. To carry on any of the foregoing activities or purposes either directly, or as agent for or with other persons, associations or schools.

e. To carry on any activity and to deal with and expend any such property or income therefrom for any of the foregoing purposes without limitation, except such limitations, if any, as may be contained in the instrument under which such property is received, the Articles of Incorporation, the Bylaws of the Corporation or any other limitations as are prescribed by law.

f. To engage in any other activity that is incidental to, connected with or in advancement of the Corporation's purposes and that is with the definition of charitable and educational purposes of Section 501(c)(3) of the Code, provided that the powers of the Corporation shall never be inconsistent with the purposes of the Corporation or the Constitution of the United States or the State of Missouri.

Article VI: Prohibited Actions

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

No substantial part of the activities of the Corporation shall be the carrying on of propaganda, or otherwise attempting to influence legislation, and the Corporation shall not participate in or intervene in (including the publishing or distribution of statements) any political campaign on behalf of or in opposition to any candidate for public office.

Notwithstanding any other provisions of these Articles, the Corporation shall not carry on any other activities not permitted to be carried on (1) by a corporation exempt from federal income tax under Section 501(a) of the Code by reason of description in Section 501(c)(3) of the Code, or (2) by a corporation, contributions to which are deductible under Section 170(c)(2) of the Code.

In the event the Corporation qualifies as a private foundation within the meaning of Section 509(a) of the Code, the Corporation shall not:

a. engage in any act of self-dealing, as such term is defined in Section 4941(d) of the Code;

b. fail to make qualifying distributions at such times and in such amounts sufficient to avoid taxation under Section 4942(a) of the Code;

c. retain any excess business holdings, as such term is defined in Section 4943(c) of the Internal Revenue Code;

d. make any investments in such manner as to subject the Corporation to taxation under the provisions of Section 4944 of the Code; or

e. make any taxable expenditures, as such term is defined in Section 4945(d) of the Code.

Article VII: Nonstock Corporation

The Corporation shall have no authority to issue capital stock.

Article VIII: Incorporator

The incorporator of the Corporation is follows:

Dana Tippin Cutler
21 W. Gregory Boulevard
Kansas City, MO 64114

Article IX: Membership

The Corporation shall have a member. The conditions governing membership, and the right, power, and authority of the member, shall be set forth in the Corporation's Bylaws.

Article X: Board of Directors

Upon filing these Articles of Incorporation, all powers of the Incorporator shall terminate. The number of directors to constitute the initial Board of Directors is four (4). Thereafter, the number of directors shall be fixed in the manner provided in the Bylaws of the Corporation.

The names and addresses of the persons who shall serve as the initial directors until the First Meeting of the Board of Directors when their successors shall be elected and shall have qualified are as follows:

Jorge Cadenas
4801 Rockhill Road
Kansas City, MO 64110

R. Stephen Green
4801 Rockhill Road
Kansas City, MO 64110

Aaron North
4801 Rockhill Road
Kansas City, MO 64110

Munro Richardson
4801 Rockhill Road
Kansas City, MO 64110

Article XI: No Personal Liability for Corporate Debts

Neither the directors nor the members, if any, of the Corporation shall be individually or personally liable for the debts, liabilities or obligations of the Corporation.

Article XII: Dissolution

Upon the dissolution of the Corporation, the Board of Directors shall, after paying or making provisions for the payment of all of the liabilities of the Corporation, distribute all of the assets of the Corporation to the Ewing Marion Kauffman Foundation (the "Foundation"), provided that the Foundation shall, at the time, qualify as an exempt organization by reason of description in Section 501(c)(3) of the Code. Otherwise, all of the assets of the Corporation shall be distributed to an organization or organizations organized and operated exclusively for charitable, educational, scientific or religious purposes that shall, at the time, qualify as an exempt organization or organizations by reason of description in Section 501(c)(3) of the Code. Any of such assets not so disposed of shall be disposed of by the District Court of the county in which the principal office of the Corporation is then located, exclusively for such purposes or to such organization or organizations as said court shall determine, which are organized and operated exclusively for such purposes.

Article XIII: Indemnification

The Corporation shall indemnify and protect any director, officer, employee or agent of the Corporation, and any person who serves at the request of the Corporation as a director, officer, employee, member, manager or agent of another corporation, partnership, limited liability company, joint venture, trust, employee benefit plan or other enterprise, to the extent provided in the Corporation's Bylaws.

In affirmation of the facts stated above.



Dana Tippin Cutler, Incorporator

21430533IV-1
H:\Legal\Affiliates\Charter School\Articles of Incorporation 2010-02-16 (bd).doc

Appendix B.1-2: Corporate Bylaws

**BYLAWS
OF
EWING MARION KAUFFMAN SCHOOL, INC.
a Missouri Nonprofit School**

ARTICLE I: Offices and Records

Section 1.1 Registered Office and Registered Agent. The location of the registered office and the name of the registered agent of Ewing Marion Kauffman School, Inc., a Missouri nonprofit School (the "School") in the State of Missouri shall be as stated in the Articles of Incorporation of the School, as amended from time to time (the "Articles"), or as shall be determined from time to time by resolution duly adopted by the Board of Directors of the School (the "Board") and on file in the appropriate public offices of the State of Missouri as provided by law.

Section 1.2 Other Corporate Offices. The School may conduct its business, carry on its operations, have other offices and exercise its powers within or outside of the State of Missouri as the Board may designate or the business of the School may require.

Section 1.3 Records. The School shall keep correct and complete books and records of account and shall keep minutes of all proceedings of its Board of Directors, including a record at its principal office of the names and addresses of its officers and directors. All committees of the School to which any of the authority of the Board of Directors may be delegated, and all other duly appointed committees of the School, shall keep minutes of their proceedings.

ARTICLE II: Objects, Purposes and Powers

The School is organized exclusively for charitable, religious, educational and scientific purposes within the meaning of Sections 501(c)(3), 170(c)(2)(B), 2055(a)(2) and 2522(a)(2) of the Internal Revenue Code of 1986, as amended or the corresponding section of any future federal tax code (the "Code"), specifically to develop, manage, and operate charter schools of excellence with a focus on serving the educational needs of at risk students and a goal of preparing its students to succeed in and graduate from college.

To enable the School to carry out such purposes, it shall have the power to do any and all lawful acts and to engage in any and all lawful activities, directly or indirectly, alone or in conjunction with others, which may be necessary, proper or suitable for the attainment of any of the purposes for which the School is organized, and as provided for in the Articles of Incorporation and these Bylaws.

ARTICLE III: Member

Section 3.1 Member. The membership of the Corporation shall consist of the Ewing Marion Kauffman Foundation, Inc. ("Member"). The Member shall have only the rights set out in the Articles of Incorporation and these Bylaws.

Section 3.2 Meetings. To the extent permitted by law, the Member shall take all action by written consent and there shall be no meetings of members or voting processes as contemplated by the Non-Profit Corporation Law.

ARTICLE IV: Board of Directors

Section 4.1 General Powers. The affairs and property of the School shall be managed and administered by or under the direction of the Board. All corporate powers, except such as are otherwise provided for in the Articles of Incorporation, these Bylaws, or the laws of the State of Missouri, shall be and hereby are vested in and shall be exercised by the Board.

Section 4.2 Number, Election, Term of Office, Removal, and Resignation

a. *Number and Election*. The Board shall consist of at least three but no more than eleven directors, such number to be determined by the Member. The number of directors may be increased or decreased by the Member within the range herein provided. Directors shall be elected by the Member. A vacancy on the Board arising at any time and from any cause may be filled for the unexpired term by the Member.

b. *Classes and Term of Office*. The Board shall be divided into three classes with initial terms of one, two or three years to expire at the corresponding annual meeting in Fiscal Year 2012, 2013, and 2014, currently scheduled for the first fiscal quarter of 2011, 2012, and 2013, respectively. All subsequent terms shall be for three years ending with the corresponding annual meeting. In any event, each director shall continue in office until his or her successor shall have been elected and qualified, or until his or her earlier death, adjudicated incapacity, resignation, or removal. Directors may serve no more than two consecutive full, three-year terms, and Directors shall be eligible for additional terms after an absence from the Board for at least one full, fiscal year.

c. Any director may resign at any time by giving written notice of such resignation to the Executive Director or the Secretary of the School. Unless required by the terms thereof, the acceptance of any such resignation shall not be necessary to make the same effective. Any director may be removed, with or without cause, by the Member.

Section 4.3 Annual and Regular Meetings. The annual meeting of the Board of Directors shall be held during the first three (3) months of the School's fiscal year as designated by the Chairman, which meeting shall be held for the purpose of electing officers and for the transaction of such other business as may come before the

meeting. The Board of Directors may provide the time and place, either within or without the State of Missouri, for the holding of regular meetings, other than the annual meeting. It is anticipated that the Inaugural Board will meet monthly.

Section 4.4 Special Meetings. A special meeting of the Board may be called at any time by the Executive Director of the School, by a majority of the directors then in office, or by any other individual so authorized by the Board. Except as otherwise provided in these Bylaws, any business may be transacted at any duly called Board meeting.

Section 4.5 Notice. All meetings, whether annual, regular, or special will be conducted pursuant to R.S.Mo. Sec. 610.010, *et seq.*, commonly referred to as the Missouri "Sunshine Law."

Section 4.6 Action of the Board. Each director present at a meeting shall be entitled to one (1) vote upon each matter submitted to a vote at any such meeting. The action of a majority of the directors present at any meeting of the Board at which a quorum exists shall be the act of the Board, except as otherwise provided by the Articles of Incorporation, these Bylaws, or the laws of the State of Missouri.

Section 4.7 Quorum. At all meetings of the Board, a majority of the total number of directors then in office shall constitute a quorum for the transaction of business.

Section 4.8 Attendance Other than in Person. Any director may participate in a meeting of the Board by means of a conference telephone or other communications equipment whereby all persons participating in the meeting can hear each other and be heard, and participation in a meeting in this manner shall constitute presence in person at the meeting.

Section 4.9 Action by Written Consent. Any Board action may be taken without a meeting if all directors consent in writing or by electronic transmission and the written consents or printed version of the electronic transmissions are filed with the minutes of the proceedings of the Board; provided, however that the vote of a director with a conflict of interest shall be considered only for purposes of procedurally reaching unanimity.

Section 4.10 Adjournment. At any meeting of the Board, whether or not a quorum is present, a majority of the directors present may adjourn the meeting to another time and place without further notice to any absent director. At any such adjourned meeting at which a quorum is present, any business may be transacted which might have been transacted at the meeting as originally called.

Section 4.11 Compensation. Directors shall not receive any compensation for their services as directors, but they may be reimbursed for reasonable expenses for attendance at meetings of the Board; provided, that nothing herein contained shall be construed to preclude any director from serving the School in any other capacity and receiving reasonable compensation for personal services actually rendered.

ARTICLE V: Committees of the Board of Directors

Section 5.1 Committees Generally. The Board may designate, by resolution approved by the Board, one or more committees of the Board. Each committee shall have two or more directors. In addition to any of the committees specifically provided for in these Bylaws, the Board of Directors, by resolution adopted by a majority of the whole Board of Directors, shall prescribe the duties and powers of each such committee established. The delegation of authority to any committee shall not operate to relieve the Board or any member of the Board from any responsibility imposed by law. Each such committee of the Board shall function to provide recommendations to the Board for consideration and action as the Board may deem appropriate.

Section 5.2 Absence. The Board may designate one or more directors as alternate members of any committee, who may replace any absent or disqualified member at any meeting of the committee. In the absence or disqualification of a member of a committee, the members thereof present at any meeting and not disqualified from voting, whether or not such members constitute a quorum, may unanimously appoint another member of the Board to act at the meeting in the place of any such absent or disqualified member. A disqualified member is a member who has been removed pursuant to Section 5.7.

Section 5.3 Recordkeeping. All committees so appointed shall, unless otherwise provided by the Board, keep regular minutes of the transactions at their meetings and shall cause them to be recorded in books kept for that purpose in the office of the School and shall report the same to the Board at its next meeting. The Secretary or an Assistant Secretary of the School may act as Secretary of the committee if the committee or the Board so requests.

Section 5.4 Meetings by Conference Telephone or Similar Communications Equipment. Unless otherwise restricted by the Articles or these Bylaws, members of any committee designated by the Board may participate in a meeting of such committee by means of conference telephone or similar communications equipment by means of which all persons participating in the meeting can hear each other, and participation in a meeting in such manner shall constitute presence in person at such meeting.

Section 5.5 Committee Action Without a Meeting. Unless otherwise restricted by the Articles or these Bylaws, any action required or permitted to be taken at any meeting of a committee may be taken without a meeting if all members of such committee who are eligible to vote consent thereto in writing, including via electronic means. Any such writing shall be filed with the minutes of proceedings of such committee.

Section 5.6 Term of Office. Each member of a committee shall continue as such until the next annual meeting of the directors of the School and until the member's successor is appointed, unless the committee shall be sooner terminated, or unless such member be removed from such committee by the Board of Directors.

Section 5.7 Chairman. One member of each committee shall be appointed chairman by the person or persons authorized to appoint the members thereof.

Section 5.8 Vacancies. Vacancies in the membership of any committee may be filled by appointments by the Board of Directors made in the same manner as provided in the case of the original appointments.

Section 5.9 Quorum. Unless otherwise provided in the resolution of the Board of Directors designating a committee, a majority of the whole committee shall constitute a quorum and the act of a majority of the members present at a meeting at which a quorum is present shall be the act of the committee.

Section 5.10 Rules. Each committee may adopt rules for its own government not inconsistent with these Bylaws or with rules adopted by the Board of Directors.

ARTICLE VI: Officers

Section 6.1 Number. The officers of the School shall be a Chairman, an Executive Director, a Treasurer and a Secretary and such other officers as may be elected to fill positions created by resolution of the Board of Directors. The School may, but need not, have a Vice President. The Chairman must be a director of the organization.

Section 6.2 Election and Term of Office. The officers of the School shall be elected by the Board of Directors at its annual meeting. New offices may be created and filled at any meeting of the Board of Directors. Each officer shall hold office until his successor shall have been duly elected or until his or her death or until he or she shall resign or shall have been removed.

Section 6.3 Removal. Any officer or agent elected or appointed by the Board of Directors may be removed by the Board with or without cause, but such removal shall be without prejudice to the contract rights, if any, of the person so removed.

Section 6.4 Vacancies. A vacancy in any office because of death, resignation, removal, or otherwise, may be filled by the Board of Directors for the unexpired portion of the term.

Section 6.5 Chairman. The Chairman shall preside over all meetings of the Board of Directors. Chairman may sign, with the Secretary, or any other proper officer authorized by the Board of Directors, any documents and instruments which the Board of Directors authorizes to be executed, except in cases where the signing and execution thereof shall be expressly delegated by the Board of Directors or by these Bylaws to some other officer or agent of the School, or shall be required by law to be otherwise signed or executed. The Chairman shall perform all duties incident to the position of Chairman as may be prescribed by the Board of Directors from time to time.

Section 6.6 Executive Director. The Executive Director shall have and exercise general charge and supervision of the affairs of the School, subject to the control of the Board, and shall do and perform such other duties as may be assigned by the Board. Except as otherwise provided by these Bylaws or by resolution adopted at any meeting

of the Board, the Executive Director shall have power to sign for the School all deeds and other agreements and formal instruments.

Section 6.7 Treasurer. The Treasurer shall, subject to the authority and approval of the Board of Directors: (a) have charge and custody of and be responsible for all funds and securities of the School; receive and give receipts for moneys due and payable to the School from any source whatsoever and deposit all such moneys in the name of the School in such banks, trust companies or other depositories as shall be selected in accordance with the provisions of Article VII of these Bylaws; provided, however, that some or all of such duties, as the Board of Directors may determine, may be delegated to a custodian, as provided in said Article VII hereof; and (b) in general perform all the duties incident to the office of Treasurer and such other duties as from time to time may be assigned to him by the Chairman or by the Board of Directors. If required by the Board of Directors, the Treasurer shall give a bond for the faithful discharge of his duties in such sum and with such surety or sureties as the Board of Directors shall determine.

Section 6.8 Secretary. The Secretary shall: (a) keep the minutes of the Board of Directors' meetings in one (1) or more books provided for that purpose; (b) see that all notices are duly given in accordance with the provisions of these Bylaws or as required by law; (c) be custodian of the corporate records and of the seal of the School and see that the seal of the School is affixed to all documents, the execution of which on behalf of the School under its seal is duly authorized in accordance with the provisions of these Bylaws; (d) maintain a permanent record of all disbursements for religious, charitable, scientific, literary or educational purposes made by the Board of Directors and/or its duly appointed officers or agents in behalf of the School; and (e) in general perform all duties incident to the office of Secretary and such other duties as from time to time may be assigned to him by the Chairman or by the Board of Directors.

Section 6.9 Assistant Treasurers and Assistant Secretaries. The Assistant Treasurers shall respectively, if required by the Board of Directors, give bonds for the faithful discharge of their duties in such sums and with such sureties as the Board of Directors shall determine. The Assistant Treasurers and Assistant Secretaries in general, shall perform such duties as shall be assigned to them by the Treasurer or the Secretary, respectively, or by the Chairman, or the Board of Directors.

Section 6.10 Compensation. Officers of the School who are not also Directors may receive reasonable compensation, as fixed from time to time by the Board of Directors, for personal services actually rendered in their capacity as officers.

ARTICLE VII: Contracts, Loans, Checks, Deposits, Custodians

Section 7.1 Contracts. The Board of Directors may authorize any officer or officers, agent or agents, to enter into any contract or execute and deliver any instrument in the name of and on behalf of the School, and such authority may be general or confined to specific instances.

Section 7.2 Loans. No loans shall be contracted on behalf of the School and no evidences of indebtedness shall be issued in its name unless authorized by a resolution of the Board of Directors. Such authority may be general or confined to specific instances.

Section 7.3 Checks, Drafts, etc. All checks, drafts or other orders for the payment of money, notes or other evidences of indebtedness issued in the name of the School shall be signed by such officer or officers, agent or agents of the School and in such manner as shall from time to time be determined by resolution of the Board of Directors.

Section 7.4 Deposits. All funds of the School shall be deposited from time to time to the credit of the School in such banks, trust companies or other depositories as the Board of Directors may select.

Section 7.5 Custodians. The Board of Directors may from time to time designate a bank, trust company or depository as custodian of all funds and properties of the School, which custodian shall maintain a record of all receipts, expenditures, income and expenses of the School and/or perform such ministerial duties as the Board of Directors by written direction may instruct. The custodian may receive fees for its services as may from time to time be agreed upon by the Board of Directors and the custodian.

ARTICLE VIII: Agents and Attorneys

The Board of Directors may appoint such agents, attorneys and attorneys-in-fact of the School as it may deem proper, and may, by written power of attorney, authorize such agents, attorneys or attorneys-in-fact to represent it and for it and in its name, place and stead, and for its use and benefit to transact any and all business which said School is authorized to transact or do by its Articles of Incorporation, and in its name, place and stead, and as its corporate act and deed, to sign, acknowledge and execute any and all contracts and instruments, in writing necessary or convenient in the transaction of such business as fully to all intents and purposes as said School might or could do if it acted by and through its regularly elected and qualified officers.

ARTICLE IX: Fiscal Year

The fiscal year of the School shall begin on the first day of July in each year and end on the last day of June in each year.

ARTICLE X: Waiver of Notice

Whenever any notice whatsoever is required to be given under the provisions of these Bylaws or under the provisions of the Articles of Incorporation or under the provisions of the Missouri Nonprofit School Act, waiver thereof in writing, signed by the person or persons entitled to such notice, whether before or after the time stated therein, shall be deemed equivalent to the giving of such notice.

ARTICLE XI: Seal

The Board of Directors may provide a corporate seal which shall be in the form of a circle and shall have inscribed thereon the name of the School and the words "Corporate Seal."

ARTICLE XII: Indemnification of Officers, Directors, Employees or Agents Against Liabilities and Expenses in Action

Section 12.1 The School shall indemnify any person who was or is a party or is threatened to be made a party to any threatened, pending, or completed action, suit, or proceeding, whether civil, criminal, administrative, or investigative, by reason of the fact that such person, or such person's testator or intestate, is or was a director or officer of the School, a committee member who is not a director of the School, or an employee or agent of the School designated for indemnification by the Board, or is or was serving at the request of the School as a director, trustee, officer, employee, or agent of another corporation, partnership, joint venture, trust, or other enterprise (hereinafter all referred to more generally as "indemnified parties"), against expenses (including attorneys' fees), judgments, fines, and amounts paid in settlement actually and reasonably incurred by such person in connection with such action, suit, or proceeding to the full extent permitted by applicable law, upon such determination having been made by a majority of the disinterested members of the Board of Directors as to such person's good faith and conduct as is required by applicable law.

Section 12.2 Advancement of Expenses. Expenses incurred in defending a civil, criminal, administrative, or investigative action, suit, or proceeding may be paid by the School in advance of the final disposition of such action, suit, or proceeding to the extent, if any, authorized by the Board in accordance with the provisions of applicable law, upon receipt of an undertaking by or on behalf of the indemnified party to repay such amount unless it shall ultimately be determined pursuant to an independent analysis and report that such indemnified party did not act in bad faith and is entitled to be indemnified by the Corporation as authorized by these bylaws.

Section 12.3 Insurance. The School may purchase and maintain insurance to indemnify the School and the indemnified parties in a manner and to the fullest extent now or hereafter permitted by law.

ARTICLE XIII: Property Devoted to Corporate Purposes

All income and properties of the School shall be devoted exclusively to the purposes as provided in the Articles of Incorporation of the School. The Board of Directors may adopt such policies, regulations and procedures governing the management and/or disbursement of funds for such purposes as in its opinion are reasonably calculated to carry out such purposes as set forth in said Articles.

ARTICLE XIV: Prohibited Transactions

No provision of the Articles of Incorporation or these Bylaws shall in any way be construed as permitting the School, whether through its Board of Directors, its officers, agents or other party acting in its behalf, to allow the net income or property of the School to inure to the private benefit of any incorporator, director, officer or individual having a personal or private interest in the activities of the School.

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

No part of the activities of the School shall be the carrying on of propaganda, or otherwise attempting to influence legislation, and the School shall not participate in or intervene in (including the publishing or distribution of statements), any political campaign on behalf of or in opposition to any candidate for public office.

In the event the School qualifies as a private foundation within the meaning of Section 509(a) of the Code, the School shall not:

- a. engage in any act of self-dealing, as such term is defined in Section 4941(d) of the Code;
- b. fail to make qualifying distributions at such times and in such amounts sufficient to avoid taxation under Section 4942(a) of the Code.
- c. retain any excess business holdings, as such term is defined in Section 4943(c) of the Code;
- d. make any investments in such manner as to subject the School to taxation under the provisions of Section 4944 of the Code; or
- e. make any taxable expenditures, as such term is defined in Section 4945(d) of the Code.

ARTICLE XV: Conflict of Interest Policy

The Board of Directors shall adopt a Conflict of Interest Policy to govern conflict of interest situations that may arise from time to time.

ARTICLE XVI: Amendments

Subject to the approval of the Member in writing, these Bylaws may be altered, amended or repealed and new Bylaws may be adopted at any meeting of the Board of

Directors called for that purpose by the affirmative vote of a majority of the Board of Directors.

ADOPTED: March 2, 2010.

Appendix B.1-3: Documentation of Missouri Nonprofit Status

State of Missouri



Robin Carnahan
Secretary of State

CERTIFICATE OF INCORPORATION
MISSOURI NONPROFIT

WHEREAS, Articles of Incorporation of

Ewing Marion Kauffman School, Inc.
N01038240

have been received and filed in the Office of the Secretary of State, which Articles, in all respects, comply with the requirements of Missouri Nonprofit Corporation Law;

NOW, THEREFORE, I, ROBIN CARNAHAN, Secretary of the State of Missouri do by virtue of the authority vested in me by law, do hereby certify and declare this entity a body corporate, duly organized this date and that it is entitled to all rights and privileges granted corporations organized under the Missouri Nonprofit Corporation Law.

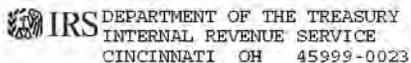
IN TESTIMONY WHEREOF, I hereunto
set my hand and cause to be affixed the
GREAT SEAL of the State of Missouri.
Done at the City of Jefferson, this
24th day of February, 2010.

Robin Carnahan

Secretary of State



Appendix B.1-4: Documentation of IRS Application Status



Date of this notice: 02-25-2010

Employer Identification Number:
27-1982958

Form: SS-4

Number of this notice: CP 575 A

EWING MARION KAUFFMAN SCHOOL INC
% MICHELLE NAUS
4810 ROCKHILL RD
KANSAS CITY, MO 64110

For assistance you may call us at:
1-800-829-4933

IF YOU WRITE, ATTACH THE
STUB AT THE END OF THIS NOTICE.

WE ASSIGNED YOU AN EMPLOYER IDENTIFICATION NUMBER

Thank you for applying for an Employer Identification Number (EIN). We assigned you EIN 27-1982958. This EIN will identify you, your business accounts, tax returns, and documents, even if you have no employees. Please keep this notice in your permanent records.

When filing tax documents, payments, and related correspondence, it is very important that you use your EIN and complete name and address exactly as shown above. Any variation may cause a delay in processing, result in incorrect information in your account, or even cause you to be assigned more than one EIN. If the information is not correct as shown above, please make the correction using the attached tear off stub and return it to us.

Based on the information received from you or your representative, you must file the following form(s) by the date(s) shown.

Form 940	01/31/2011
Form 944	01/31/2011

If you have questions about the form(s) or the due date(s) shown, you can call us at the phone number or write to us at the address shown at the top of this notice. If you need help in determining your annual accounting period (tax year), see Publication 538, *Accounting Periods and Methods*.

We assigned you a tax classification based on information obtained from you or your representative. It is not a legal determination of your tax classification, and is not binding on the IRS. If you want a legal determination of your tax classification, you may request a private letter ruling from the IRS under the guidelines in Revenue Procedure 2004-1, 2004-1 I.R.B. 1 (or superseding Revenue Procedure for the year at issue). Note: Certain tax classification elections can be requested by filing Form 8832, *Entity Classification Election*. See Form 8832 and its instructions for additional information.

If you are required to deposit for employment taxes (Forms 941, 943, 940, 944, 945, CT-1, or 1042), excise taxes (Form 720), or income taxes (Form 1120), you will receive a Welcome Package shortly, which includes instructions for making your deposits electronically through the Electronic Federal Tax Payment System (EFTPS). A Personal Identification Number (PIN) for EFTPS will also be sent to you under separate cover. Please activate the PIN once you receive it, even if you have requested the services of a tax professional or representative. For more information about EFTPS, refer to Publication 966, *Electronic Choices to Pay All Your Federal Taxes* and Publication 4248, *EFTPS (Brochure)*. If you need to make a deposit before you receive your Welcome Package, please visit an IRS taxpayer assistance center to obtain a Federal Tax Deposit Coupon, Form 8109-B. To locate the taxpayer assistance center nearest you, visit the IRS Web site at <http://www.irs.gov/localcontacts/index.html>. Note: You will not be able to obtain Form 8109-B by calling 1-800-829-TAXFORMS (1-800-829-3676).

Appendix B.1-5: Documentation of Criminal Background and Child Abuse Registry Checks



March 17, 2010

Jocelyn Strand
Director of Charter Schools
Missouri Department of Elementary and Secondary Education
205 Jefferson Street
PO Box 480
Jefferson City, MO 65102

RE: Ewing Marion Kauffman School Background Checks

Ms. Strand:

Criminal background and child abuse registry checks were conducted for all members of the Ewing Marion Kauffman School (Kauffman School) Board of Directors pursuant to R.S.Mo 160.400.11. All results were received by March 16, 2010. The criminal background and child abuse registry checks were conducted by ADP Background and Screening Services. No incidents or areas of concern were reported in the results of the background checks for any members of the Board of Directors. The members of the Board of Directors screened include:

- Jorge Cadenas
- R. Stephen Green
- Aaron North
- Munro Richardson

Results of the criminal background and child abuse registry checks will be kept confidential and stored in a secure manner at the Ewing Marion Kauffman Foundation (4801 Rockhill Rd. Kansas City, MO 64111). These records will be available upon request to the Missouri Department of Elementary and Secondary Education (DESE) and to the Kauffman School's sponsoring institution. All future board members, employees, and other individuals coming into regular contact with students will be subjected to criminal background and child abuse registry checks as stipulated in Missouri statute and the school's charter.

Please contact me with any questions or to request confidential copies of the results.

Sincerely,

David Allen
Human Resources, Ewing Marion Kauffman Foundation
4801 Rockhill Rd.
Kansas City, MO 64111



www.kauffman.org

4801 ROCKHILL ROAD KANSAS CITY, MISSOURI 64110-2040 TEL: 816-932-1000

Appendix B.2-1: CV and Request for Information from Prospective School Board Member, Jorge Cadenas

Jorge A. Cadenas

14320 Nieman Road
Overland Park, Kansas 66221
(913) 685-1030
jcadenas2001@yahoo.com

EDUCATION: B.S. Degree in Economics, George Mason University, December, 1993

EXPERIENCE:

Quest Diagnostics, Inc.
Lenexa, Kansas
July 2009 to Present

Controller

- Is the Financial Leader of ExamOne (formerly LabOne and a subsidiary of Quest Diagnostics), a \$300MM company.
- Identify and drive best practices in all aspects of revenue growth and cost containment to maximize profit margins across all lines of business.
- Leader of continuous process improvement team which is tasked to deliver the highest quality service at the lowest cost.
- Proven interpersonal, tactical and strategic leadership skills; all functions look to the Finance Division for business advice.
- Responsible for the integrity and accuracy of ExamOne's monthly financial statements.
- Insure internal controls are adequate and functioning properly.
- Manage an Assistant Controller and a support staff of eleven employees.

Hallmark Cards, Inc.
Kansas City, Missouri
February 2001 to July 2009

Finance Manager – November 2004 - Present

- Managed financial responsibilities for the entire Gold Crown Retail channel which is approximately 3,500 Hallmark Gold Crown stores with revenues in excess of \$750MM.
- Responsibilities included: P&L reporting, forecasting, strategic planning, growth opportunities, market development, and providing financial support to the Sales Division.
- Was responsible for a \$33.0MM non-product budget.
- Reported and presented monthly financial updates to Senior Leadership on Gold Crown.
- Managed one Manager, one Senior Analyst and three Financial Analyst's.
- Negotiated and acquired stores from Independent Retailers for Hallmark's Corporate Store Group. Collaborated with Hallmark's Legal, Real Estate, and Sales Division in managing the entire acquisition process as it transfers to Hallmark.
- Analyzed existing highly visible Gold Crown Independent Retailer's business (including review of income statements, balance sheet and cash flow statements) and advised on business improvement initiatives and financing options.
- Was a member of a strategic task force assembled by the President of Hallmark Retail which was responsible for defining a Real Estate methodology to maintain and grow points of distribution.

Senior Financial Analyst – February 2001 to November 2004

- Monitored performance, advised on business improvement initiatives, strategic plans, discussed issues and was a financial liaison between the CFO's and Corporate Senior Management for eleven of Hallmark's Subsidiaries.
- Assisted in identifying \$18.6MM in cost savings from the Subsidiaries for total Hallmark cost savings initiative.
- Developed and presented the financial NPV to Senior Management which led to the decision to exit International facilities and ship direct out of Hallmark's Distribution Center.
- Conducted analysis on the Hallmark Retail Network to better understand the condition of our Retailers Post 9-11. This analysis was used by the Hallmark President/CEO when he presented to the Board of Directors.
- Collaborated with Corporate Finance in assessing acquisition opportunities and conducting financial modeling/analysis on potential prospects.
- Collaborated with Corporate Finance in creating valuation models used to manage Hallmark Subsidiaries (i.e. reallocation of capital, tax benefits, etc.).
- Was the Financial Lead on a National Distribution Analytical Team which focused on establishing a process along with an enhanced tool that will enable Hallmark to develop a holistic view of distribution of all its products across all channels with emphasis on profitability rather than additional wholesale volume. This group presented our recommendation (with estimated costs) to the Hallmark President which was approved.

KPMG Consulting, Inc. (now BearingPoint)
McLean, Virginia
February 1999 to February 2001

Senior Consultant

- Managed two Consultants and two Analysts.
- Responsible for the data conversion and verification of Federal/State and Private Business funded grants and contracts into an Oracle Grants Management System at George Washington University.
- Provided financial consulting services to the Director of Academic Affairs at George Washington University to manage their office's operating budget.
- Implemented a process in the recovery of accounts receivable and the reconciliation of Payment Management System accounts at a bankrupt institution and transferred them to successor-in-interest at Medical College of Pennsylvania/Hahnemann University which led to the collection effort of over \$2.1 million in outstanding accounts.
- Developed and presented a proposal which created approximately one and a half million dollars in revenue for KPMG.

TWD & Associates, Inc.
Arlington, Virginia
August 1995 to January 1999

Financial Manager

- Managed three Financial Analysts and three Operations Support Analysts.
- Updated and managed database which maintains the US Navy operating budget (approximately 750 million dollars).
- Performed cost and process analysis for US Navy budget formulation and execution divisions.
- Tracked funding changes issued by Congress and recommended appropriate proposals to handle the increase/decrease of funds.
- Analyzed and revised funding documents for the Program Executive Office for Surface Combatants, US Navy.

Strategic Planning International, Inc.

Arlington, Virginia
April 1994 to July 1995

Research Analyst

- Assisted in the development of an import/export consulting service.
- Contacted potential clients in Latin America for import/export transactions.
- Trained State Department Bureau of Consular Affairs employees in Crisis Management and their Crisis Response Information System database.

SKILLS/ACTIVITIES:

- 2006 Hallmark Crown of Excellence Award Recipient
- Member of the Board of Directors and Treasurer, Kauffman Scholars Inc. – Kauffman Foundation
- Former Member of the Board of Directors, Guadalupe Center, Inc.
- Currently in Six Sigma training for Greenbelt Certification
- Proficient in Spanish
- Proficient with Microsoft Office (Word, Access, Excel, PowerPoint)

Board Member Name: Jorge Cadenas

Short Biographical Statement

Instructions

Please provide a short biographical statement of approximately 150 words (written in the third-person perspective). Any relevant information regarding your interest in education and/or serving the Kansas City community is especially appropriate.

Biographical Statement

Jorge Cadenas is the head of the Finance Division for ExamOne, a Quest Diagnostics subsidiary which is a \$300MM company. His primary responsibilities are to support the profitable growth of the business and ensure accuracy of the financial reporting. Jorge has over 15 years of financial, management and consulting experience. Prior to his current role with Quest, he was with Hallmark Cards, Inc. for over eight years, where he held various financial leadership roles including his last position with the Retail – Gold Crown division as Finance Manager. Prior to that, Jorge was residing in the Washington, DC area (where he was born and raised) working with KPMG Consulting (now BearingPoint) as a Senior Consultant of Education & Nonprofit services. As a child from parents who fled Cuba as young teens, Jorge is passionate about the right to a fair opportunity. It begins with an opportunity for all regardless of race, creed, or economic status to attain a quality education. In this vein, he feels fortunate to currently serve on the Board of Directors with Kauffman Scholars, Inc. While attending George Mason University until his graduation, he worked as a tutor and mentor for "at-risk" youth in the Early Identification Program. Jorge believes all youth should have access to a high quality of education and he is dedicating his efforts to assist in achieving this goal. He lives in Overland Park, KS with his wife and has three children.

Request for Information from Prospective Charter School Board Members

Instructions

The Applicant's proposed governing board members are required to provide a current resume' detailing their qualifications and experiences and respond to the Request for Information that follows. Please be sure to submit these items together for each board member. Information on a proposed board member will not be considered unless complete information (resume' and completed Request for Information) is provided.

Request for Information from Prospective

Governing a public charter school requires commitment and responsibility. The governing board will be ultimately responsible for the sound education of all children enrolled in the school and for the responsible use of the public funds that the school receives. Your desire to serve on a charter school board indicates a belief in and commitment to quality public schools for all children. It also indicates a willingness to serve as a public official. We recognize the

significance of those commitments and appreciate your willingness to take on the accompanying responsibility.

If the application is approved, the board will enter into a charter contract that establishes the terms under which the school will operate. Therefore, one purpose of the charter school application is to provide the sponsor a sense of the board's capacity to govern the school effectively. With that purpose in mind, each prospective board member should respond to this request for information.

I. Background

- 1) *Describe your educational and employment history. You may complete this item by attaching a resume'.*
 - A. Please see resume' included with these materials.
- 2) *If true, please affirm that you will be at least eighteen years old by January 1 of the year in which the proposed charter school would open.*
 - A. I affirm I will be at least 18 years of age prior to January 1 of the year in which the proposed charter school will open.
- 3) *How did you become aware of the proposed charter school and the opportunity to serve as a member of its board?*
 - A. I currently serve on the board of Kauffman Scholars, Inc. (KSI) a college preparation and access program whose goal is to increase the number of college graduates from the urban school districts of Kansas City, Missouri and Kansas City, Kansas. I was asked by Kauffman Scholars CEO, Dr. Steven Green to serve on this board.
- 4) *Explain why you would like to serve on the board.*
 - A. I want to be associated with a cause which increases the opportunities for learning and provides access to a quality education for all people regardless of race or economic standing. The Kauffman School has the opportunity to be a catalyst for change in demanding a higher standard amongst existing charter public schools. Goal is to establish a model that is easily replicable and serve as a new standard for quality learning development.
- 5) *Have you previously served on a board of a school district or a not-for-profit corporation (including the board of a parochial or independent private school)? If so, describe any relevant experience. If you have not had any previous service, discuss why you wish to serve in this capacity.*
 - A. No. See above.
- 6) *What is your understanding of the appropriate role of a public charter school board member?*
 - A. A charter school board member must comply with all laws as required by the State and must fulfill duties of care, loyalty and obedience to the school and community being served. Some primary roles are: regular attendance and participation in board/committee meetings; read, review and inquire about materials that involve the charter school (i.e. board minutes, annual reports, plans, policies, etc.); have fiduciary responsibility for the budget and finances; hire school leadership and hold

them accountable in achieving measurable education standards for the students within budgetary parameters.

- 7) *What relevant knowledge and experience will you bring to the board?*
- A. I will ensure that financial resources are being used efficiently and effectively toward meeting the charter's goals and in compliance with applicable law and regulation. Outside of my work experience relating to finance, business advisement and consulting, my past experience also includes:
 - i. Currently serving as Treasurer and Board Member of Kauffman Scholars, Inc.
 - ii. Former Board Member of Guadalupe Center in Kansas City which operated Alta Vista Charter High School and Plaza del Niño Preschool.
 - iii. Served as a mentor and tutor for 3 years with the Early Identification Program at George Mason University (mission was similar to Kauffman Scholars, Inc.).
 - iv. Spent 5 months as a substitute teacher at a middle school in the Fairfax County, VA school system.
- 8) *Assuming the school is successful, what is your image of how the school will look towards the end of the first year? What will it be like after four years?*
- A. After the first year, the school has established solid structures, systems and school-wide and classroom cultures all focused on the school's mission. Every classroom exhibits fidelity to three core principles of the school—rigor, engagement, and urgency. As a result, the school is able to demonstrate solid academic growth (at least 1.5 years) in its students relative to where they started at the beginning of the school year. After year four, the Kauffman School is recognized locally and nationally for consistently delivering solid results for students and their families.

II. Educational Philosophy

- 9) *What is your understanding of the school's mission and/or philosophy?*
- A. The Kauffman School will offer a staff and curriculum which provides intensive academic enrichment, other support services to help students realize their full potential and prepare them for a successful future.
- 10) *Are you familiar with the school's proposed educational program? How would you describe it?*
- A. The Kauffman School will deliver an educationally rich program which will provide the curriculum, guidance and support necessary to place urban youth on the path to college graduation. This will be accomplished by enriching students and their families early in their development stages.
- 11) *What are the characteristics of a successful school? What specific steps do you think the board will need to take in the first year or two to ensure that this school is successful?*
- A. I believe a successful school is one that begins with a clear, powerful mission which guides students, teachers, parents and board members. Everyone associated with the school knows what it stands for and believes in delivering its vision. The school engages teachers, students and parents as real, significant and contributing partners. The school fosters a curriculum and culture that is challenging, enriching, innovative, highly collegial and focused on continuous improvement. Finally, it must have a strong accountability system.

The Board anticipates and expects start-up challenges. It is our duty and responsibility to remain focused and responsive. Some steps the board will take include developing the mission and vision for the school, thinking through every facet of the school program, writing the charter, hiring staff, making decisions about curriculum, and securing the building and funds necessary to open and maintain operations.

III. Conflict of Interest Disclosure

- 12) *Do you or your spouse know any of the other prospective board members? If so, please indicate the name of the person and the relationship.*
 - A. Yes, I have a professional relationship by serving on the board with Dr. Steven Green through Kauffman Scholars, Inc.
- 13) *Do you or your spouse have a pre-existing relationship with any people already identified as prospective school employees? If so, please so indicate and describe the relationship.*
 - A. No.
- 14) *Do you or your spouse know anyone that plans to do business with the school? If so, please so indicate and describe the relationship and the nature of the potential business.*
 - A. No. No business arrangements with the school have been established at this time.
- 15) *If the school proposes to partner with an educational service provider (a management company), do you or your spouse know any employees, owners, or agents of that provider? If so, please indicate the individuals you know and the nature of the relationship.*
 - A. N/A
- 16) *(If the school does not intend to partner with an educational service provider, write "N/A").*
 - A. Please see above
- 17) *If the school intends to partner with an educational service provider, do you or your spouse have a direct or indirect ownership, employment, contractual, or management interest in the educational service provider?*
 - A. N/A
- 18) *(If the school does not intend to partner with an educational service provider, write "N/A").*
 - A. Please see above
- 19) *Do you anticipate conducting any business with the educational service provider, the school, or both? If so, describe the potential relationship.*
 - A. N/A. Please see above.
- 20) *Are there any potential ethical or legal conflicts of interest that you can foresee in the context of your service on the school's board? If so, explain.*
 - A. No.
- 21) *How would you handle a situation in which you believe one or more members of the school's board to be engaged in self-dealing (i.e. making arrangements involving the school that materially benefit the board member, his/her friends or family).*

- A. I would discuss the situation with my fellow Board members and with the individual directly. I would seek the advisement of legal counsel to insure next steps to correct this were clear, ethical, open and in a legally appropriate manner. I, along with the rest of the Board, would work with this member to correct this behavior by implementing a Code of Ethics to stop this and prevent it from reoccurrence. If they refused or were unwilling to avoid and change this conduct, I would recommend removal of this member from the Board.

Appendix B.2-2: CV and Request for Information from Prospective School Board Member, R. Stephen Green

ROBERT STEPHEN GREEN

15101 Lake Side Drive
Basehor, Kansas 66007

green_8788@msn.com

Home: 913-728-2732
Mobile: 816-377-2238

PROFESSIONAL PROFILE

Highly accomplished visionary Executive with nationwide exposure and experience. Results-oriented, decisive leader with proven success in the educational field, developing programs and learning tools for all students.

CORE SKILLS AREAS and COMPETENCIES

Visionary Leadership	Accomplished Spokesperson	Due Diligence
Project-Based Learning	Partnerships & Alliances	Team Building
Strategic Business Planning	Curriculum Development	Instructional Best Practices
Differentiated Instruction	Mentoring & Coaching	Leadership Development
Quantitative and Qualitative Analysis	Experiential Learning	Management & Discipline
Balanced Literacy & Numeracy	Data-Informed Instruction	Disruptive Innovation

PROFESSIONAL EXPERIENCE

KAUFFMAN SCHOLARS, INC., Kansas City, MO President and Chief Executive Officer	2005 - Present
As President and Chief Executive Officer, I am responsible for overseeing the entire operations of Kauffman Scholars, Inc. (KSI) and for ensuring the fulfillment of our mission, which is to increase the college attendance and college completion rate for low-income urban students in Kansas City and the nation, and establish Kauffman Scholars as a national model for doing so. I am also responsible for establishing and sustaining a culture that exhibits the Kauffman Scholar organization's commitment to top quality performance and exemplary results. In doing so, I have created and implemented the policies and procedures approved by the board of directors and have managed KSI's resources within budgetary guidelines according to current laws and regulations.	
Recent accomplishments and achievements of our organization include the following:	
<ul style="list-style-type: none"> • Developed and executed the KSI 5-Year Operational Plan • Class 1 Cumulative Retention Rate: 81% • Class 1 Program Completion Rate: 65% • Class 1 College Attendance Rate: 95% • Class 1 4-Year College Attendance Rate: 80% • Urban Light in Education Award, Spring 2008 • Argentine MS Wall of Fame Award, Spring 2008 	
NEW YORK CITY BOARD OF EDUCATION, New York City, NY Superintendent, Community School District 28 and Local Instructional Superintendent, Region 3	2003 - 2005
NEW JERSEY TEACHING AND LEARNING COLLABORATIVE, INC., Montclair, NJ President and Executive Director	2003 - 2004
THE COLLEGE BOARD, New York City, NY National Executive Director, College Ed Program 2001-2003 National Executive Director, School-Level Services 1999-2001 National Director, Pacesetter Program 1997-1999 Associate Director for Pacesetter Planning and Development 1995-1997	1995 - 2003
METROPOLITAN SCHOOL DISTRICT OF LAWRENCE TOWNSHIP, Indianapolis, IN Assistant Superintendent 1991-1995 Assistant Principal, Lawrence North High School 1989-1991 Assistant Principal, Belzer Middle School 1987-1989	1987-1995
METROPOLITAN SCHOOL DISTRICT OF PIKE TOWNSHIP, Indianapolis, IN English Instructor, Pike High School	1981-1987
<ul style="list-style-type: none"> • Taught Senior Honors/Advanced Placement • Sophomore Honors • Adjunct Professor of College Composition in Indiana University's Advanced College Project (ACP) 	
METROPOLITAN SCHOOL DISTRICT OF WASHINGTON TOWNSHIP, Indianapolis, IN	1980-1981

English Instructor, North Central High School

INDIANA UNIVERSITY, Bloomington, IN 1979-1983
Danforth Fellow and Associate Instructor of English

MUNCIE COMMUNITY SCHOOLS, Muncie, IN 1976-1978
Instructor of English and Physical Education, Muncie Central High School

OTHER PROFESSIONAL EXPERIENCES

COLLEGE BOARD, New York City, NY; 1999-2002
Director of New York Outreach

BUTLER UNIVERSITY, Indianapolis, IN; 1983-1995
Adjunct Professor of African-American Literature 1984-1995
Director of Minority Student Affairs 1983-1986

INDIANA UNIVERSITY, Bloomington, IN; 1979-1983
Associate Instructor of English
• Taught professional writing and college composition

INDIANA UNIVERSITY-EAST, Richmond IN; 1980-1981
Associate Instructor of English
• Taught African-American Literature

BALL STATE UNIVERSITY, Muncie, IN; 1978-1979
Associate Instructor of English;
• Taught freshman composition

EDUCATION & CREDENTIALS

INDIANA UNIVERSITY, Bloomington, IN
Doctor of Education Degree 1995
• Two Majors: Curriculum & Instruction and Education Administration
➤ *DOCTORAL DISSERTATION: THE PREFERRED LEARNING STYLES OF FOUR AFRICAN-AMERICAN MALES: A CASE STUDY ANALYSIS*

Specialist in Education Degree 1995 Majors in Curriculum & Instruction and Education Administration
Superintendent's License 1995

BUTLER UNIVERSITY, Indianapolis, IN
Master of Arts Degree in Curriculum & Instruction and Education Administration 1987
School Administrator's License 1987

INDIANA UNIVERSITY, Bloomington, IN
Danforth Fellowship Sabbatical 1980 English Composition and Literature

BALL STATE UNIVERSITY, Muncie, IN
Master of Arts Degree in English Literature 1978
➤ *MASTERS THESIS: THE ANATOMY OF THE CONCEIT IN JOHN DONNE'S SONGS AND SONNETS*

Bachelor of Science Degree 1976 Major: English Literature and Composition, Minor: Physical Education

PIKE HIGH SCHOOL, Indianapolis, IN
High School Diploma and Graduation 1972

AWARDS: 1976 London Centre Fellow - One of 40 students selected to attend Ball State University's London Centre.
1979 Danforth Fellow - One of 40 students in the nation selected to receive post-graduate fellowship.
1985 First Degree Black Belt in Taekwondo.
1985 Outstanding Student of Martial Arts Award.
1986 University of Chicago Outstanding Teacher Award.

1986 Pike High School Teacher of the Year.
 1987 Pike High School Teacher of the Year.
 1988 Experiential Program for Preparing School Principals, Outstanding Leadership Award
 1989 Indiana Principals Leadership Award
 1995 Who's Who Among Outstanding Business Executives.
 1995 Lawrence Township's Superintendent's Award.
 1995 Lawrence Township's Above and Beyond Award.
 1995 City of Lawrence, Honorary Deputy.
 2007 Polmarch's Award for Outstanding Dedication and Service.
 2008 Chapter Man of the Year, Independence MO Alumni Chapter of Kappa Alpha Psi.
 2008 Middle Western Province Man of the Year, Percy H. Lee Achievement Award.

MEMBERSHIPS:

- Kappa Alpha Psi Fraternity, since 1973.
- Task Force for the Development of English Standards Project, 1985-1992.
- Association of Supervision, Curriculum and Development, since 1996.
- National Alliance of Black School Educators, since 1995.
- National Council for the Teachers of English, since 1990.
- Minority High Achievement Task Force, The College Board, since 2003
- National College Access Network, since 2005
- National Association of Scholarship Providers, since 2005
- National Institute for Construction Excellence, since 2005
- Board of Directors, Independence MO Alumni of Kappa Alpha Psi Fraternity, Inc.
- KCPT Board of Directors, since 2005
- Kauffman Scholar, Inc. Board of Directors, since 2005
- Board of Directors, University Academy, since 2008
- Board of Directors, Academie Lafayette, since 2009

PUBLICATIONS:

"Males Matter: Address in the Dilemma of Males and the Absence of their Presence in Higher Education," winter, 2008.
 "Cost and Effect: The Implications of Educating and Not Educating Our Children and Our Youth," *The Kauffman Foundation Thoughtbook*, fall, 2007.
 "Kauffman Scholars—Closing the Gap," *The Kauffman Foundation Thoughtbook*, fall, 2005.
 "College Preparation in the Middle Grades: It's More Than SATs," *Middle Matters*, Fall 2001.
 "Closing the Achievement Gap: Lessons Learned and Challenges Ahead," *Teaching and Change*, Winter, 2001.
 Co-author of The College Board's Pacesetter English Program.
 Author and Presenter of the *Key Communicator Program for the Lawrence Township Schools*.
 Writer and Producer of *Lawrence Township Schools Video Voyage I and II*.
 Quoted in the June, 1994 edition of *Curriculum Update*, Published by ASCD.
 Featured in Training Video for *Discipline with Dignity*.
 Featured in Phi Delta Kappa's Video, entitled, *Touching the Future, Minorities in Education*.
 Featured in The College Board's *Pacesetter* video.
 Writer and Producer of television program, *Clark's Commentary*.
 Author of *Shareholders' Report* for the Lawrence Township Schools.
 Author of *Public Relations Handbook* for the Lawrence Township Schools.
 Author of *New Employee Handbook* for the Lawrence Township Schools.
 Author of *Focus* for the Lawrence Township Schools.
 Author of *Insight* for the Lawrence Township Schools.
 Author of *Board Briefs* for the Lawrence Township Schools.
 Producer of the *Diamond Delivery* Program, Operation Bread Basket.
 The Pacesetter Newsletter of The College Board.
 "Pacesetter: Setting the Pace" The College Board.
 "Crosswalks: Pacesetter and the National Standards" - The College Board - Publications for Pacesetter English, Mathematics, and Spanish.

(copies of each available upon request)

Board Member Name: Steve Green

Short Biographical Statement

Instructions

Please provide a short biographical statement of approximately 150 words (written in the third-person perspective). Any relevant information regarding your interest in education and/or serving the Kansas City community is especially appropriate.

Biographical Statement

Dr. R. Stephen Green is President and CEO of Kauffman Scholars, Inc., a comprehensive college preparatory and scholarship program designed to significantly increase the number of college graduates from Greater Kansas City's urban schools. Previously, Green was the superintendent of Community School District 28 and a local instructional superintendent in Region Three for the New York City Board of Education. He has also served as president and executive director of the New Jersey Teaching and Learning Collaborative; national executive director of the College Ed Program for the College Board; assistant superintendent for the Metropolitan School District of Lawrence Township in Indiana; teacher and professor of English literature at the high school and university levels; and director of minority student affairs at Butler University. Green earned his bachelor's and master's degrees in English literature from Ball State University in Muncie, Ind. and his Ed.D. degree in curriculum instruction and education administration from Indiana University.

Request for Information from Prospective Charter School Board Members

Instructions

The Applicant's proposed governing board members are required to provide a current resume' detailing their qualifications and experiences and respond to the Request for Information that follows. Please be sure to submit these items together for each board member. Information on a proposed board member will not be considered unless complete information (resume' and completed Request for Information) is provided.

Request for Information from Prospective

Governing a public charter school requires commitment and responsibility. The governing board will be ultimately responsible for the sound education of all children enrolled in the school and for the responsible use of the public funds that the school receives. Your desire to serve on a charter school board indicates a belief in and commitment to quality public schools for all children. It also indicates a willingness to serve as a public official. We recognize the significance of those commitments and appreciate your willingness to take on the accompanying responsibility.

If the application is approved, the board will enter into a charter contract that establishes the terms under which the school will operate. Therefore, one purpose of the charter school application is to provide the sponsor a sense of the board's capacity to govern the school effectively. With that purpose in mind, each prospective board member should respond to this request for information.

I. Background

- 1) *Describe your educational and employment history. You may complete this item by attaching a resume'.*
 - A. Please see resume' included with these materials.
- 2) *If true, please affirm that you will be at least eighteen years old by January 1 of the year in which the proposed charter school would open.*
 - A. I affirm I will be at least 18 years of age prior to January 1 of the year in which the proposed charter school will open.
- 3) *How did you become aware of the proposed charter school and the opportunity to serve as a member of its board?*
 - A. I have served as the President of Kauffman Scholars, Inc and as a member of the Ewing Marion Kauffman Foundation Senior Leadership Team since April 2005 and was one of the first to propose the concept of a charter school to both organizations.
- 4) *Explain why you would like to serve on the board.*
 - A. As evidenced by my career path, I have devoted my life's work to addressing the issues of college access, equity, and excellence for all students. Serving on this board is further evidence of this devotion. I firmly believe that the Kauffman School will serve as a beacon of hope and opportunity for this community and that it will become an exemplary model for other public and charter schools.
- 5) *Have you previously served on a board of a school district or a not-for-profit corporation (including the board of a parochial or independent private school)? If so, describe any relevant experience. If you have not had any previous service, discuss why you wish to serve in this capacity.*
 - A. Yes, I have served or am currently serving on the board of several not-for-profit corporations. Among these are the following:
 - i. The Kauffman Scholar Board of Directors (President and CEO)
 - ii. The KCPT Public Television Board (Chairman of the Education Subcommittee)
 - iii. The Academie Lafayette School Board (Member)
 - iv. The University Academy School Board (2008-09)
 - v. The National Institute for Construction Excellence (NICE) Board of Directors (Chairman of the Education Subcommittee)
 - vi. The Christian Education Board of Directors for Oak Ridge Missionary Baptist Church
 - vii. The Independence Alumni of Kappa Alpha Psi Fraternity, Inc (Member)In these roles of service, I have had the opportunity to participate in numerous board training sessions. I have also had the opportunity to engage in the important process of consensus building and collaboration as well as

other best practices of effective not-for-profit school boards, e.g., strategic planning, fund raising, etc.

- 6) *What is your understanding of the appropriate role of a public charter school board member?*
- A. A public charter school board is a governing body and therefore each member has a fiduciary responsibility to make sure the financial resources of the board are appropriately used. The charter school board member should play a role in the hiring and evaluating the Executive Director, and should play a major role in setting forth the strategic vision for student success/achievement as well the means by which the effectiveness of this vision's execution will be measured.
- 7) *What relevant knowledge and experience will you bring to the board?*
- A. In addition to my previous experience as an educator and school administrator (on several levels) and as a board member, I believe I bring a certain degree of business acumen, educational expertise and intuitive intelligence to the Kauffman School Board.
- 8) *Assuming the school is successful, what is your image of how the school will look towards the end of the first year? What will it be like after four years?*
- A. The Kauffman School will attract some of the most dedicated and talented teachers in the country. With this as its foundation, the board, the school leadership team, and its staff will have rolled out the "essential support system" that will enable students to achieve its annual goals. Together, they will create a caring school environment that has high expectations and that makes no excuses.

After four years, the school will have established its culture and its dashboard for monitoring and assessing educational progress. The school will have met AYP in all subgroup areas and its first class will be entering high school. The school has begun to be recognized locally and nationally as a model for educational excellence.

II. Educational Philosophy

- 9) *What is your understanding of the school's mission and/or philosophy?*
- A. The Kauffman School is committed to ensuring that its students receive a rich and robust academic experience in the context of a nurturing and caring learning environment. Blending high expectations in a rigorous curriculum with a supportive learning environment will enable students who attend this school to overcome the circumstances that put them at a decided academic disadvantage and will pave the way to their college access and success.
- 10) *Are you familiar with the school's proposed educational program? How would you describe it?*
- A. The mission is focused college prep and life prep combined with a whatever-it-takes approach to teaching and learning.
- 11) *What are the characteristics of a successful school? What specific steps do you think the board will need to take in the first year or two to ensure that this school is successful?*
- A. Successful schools are relentless and resilient in their commitment to helping their students achieve success. They are intently focused on their dashboards, constantly reading the indicators for evidence progress and success and along the way making

the necessary corrections and modifications that will enable productive student learning. To this end, it will be important for the board to select a school leadership team that will create the conditions and execute the principles for successful student learning.

- B. In its first year, the board will need to create and establish the appropriate culture of governance and support for the leadership team.

III. Conflict of Interest Disclosure

- 12) *Do you or your spouse know any of the other prospective board members? If so, please indicate the name of the person and the relationship.*
- A. Yes.
- i. Munro Richardson and I are members of the Ewing Marion Kauffman Foundation's Senior Leadership Team. Kim Green, my spouse, knows him.
 - ii. Aaron North is a consultant working on the school's design team for the Ewing Marion Kauffman Foundation. Kim Green, my spouse does not know him.
 - iii. Jorge Cadenas is the treasurer for the Kauffman Scholars, Inc Board of Directors. I am President of Kauffman Scholars, Inc. Kim Green, my spouse, does not know him.
- 13) *Do you or your spouse have a pre-existing relationship with any people already identified as prospective school employees? If so, please so indicate and describe the relationship.*
- A. No.
- 14) *Do you or your spouse know anyone that plans to do business with the school? If so, please so indicate and describe the relationship and the nature of the potential business.*
- A. No. No business arrangements with the school have been established at this time.
- 15) *If the school proposes to partner with an educational service provider (a management company), do you or your spouse know any employees, owners, or agents of that provider? If so, please indicate the individuals you know and the nature of the relationship.*
- A. N/A
- 16) *(If the school does not intend to partner with an educational service provider, write "N/A").*
- A. Please see above
- 17) *If the school intends to partner with an educational service provider, do you or your spouse have a direct or indirect ownership, employment, contractual, or management interest in the educational service provider?*
- A. N/A
- 18) *(If the school does not intend to partner with an educational service provider, write "N/A").*
- A. Please see above
- 19) *Do you anticipate conducting any business with the educational service provider, the school, or both? If so, describe the potential relationship.*
- A. N/A. Please see above.

20) *Are there any potential ethical or legal conflicts of interest that you can foresee in the context of your service on the school's board? If so, explain.*

A. No.

21) *How would you handle a situation in which you believe one or more members of the school's board to be engaged in self-dealing (i.e. making arrangements involving the school that materially benefit the board member, his/her friends or family).*

A. I would consult legal counsel on the matter. I would also share my concern with the chairman of the board, assuming that he or she is not the person of concern. If need be, an investigation should be conducted to verify any information or suspicions. If there is verification of the concern, I would request an emergency, closed session to address the matter of concern up to including removal of the member from the board if he or she is unwilling or unable to discontinue the unethical conduct.

Appendix B.2-3: CV and Request for Information from Prospective School Board Member, Aaron North

Aaron M. North	
4015 Genessee Street Kansas City, MO 64111	816-456-0526 anorth@northologyllc.com

Qualifications

- Start-up of statewide nonprofit charter school support organization within an accelerated time frame.
- Ten years experience in strategic planning, solution development, risk assessment, and implementation planning in public schools, federal government, telecommunications, nonprofit and state agency sectors.
- Twelve years demonstrated strong written and oral communication skills.
- Management skills developed through nonprofit leadership, charter school board oversight, strategic planning, and executive board membership.

Experience

Northology LLC – Kansas City, MO
Owner, March 2009 – present

- Consulting agency offering support in strategic planning, organizational development, grant writing, and communications aligned to fostering a more effective public education sector.
- Primary engagements to date include charter school development for leading entrepreneurship foundation and executive leadership transition of statewide charter school support organization.

Missouri Charter Public School Association – Kansas City, MO
Executive Director, October 2006 – March 2009

- Initial employee charged with organizational development and expansion of services portfolio for statewide membership and professional organization representing two of the nation's largest urban charter school markets.
- Responsible for developing budget and sustainable revenue streams – increased revenues approximately 544% from end of FY06 to end of FY07, revenues increased an additional 162% the following year.
- Developed and implemented organization's first 3-year strategic plan designed to increase the quality of existing charter schools, ensure the quality of new charter schools, and establish organization as a sustainable statewide resource.
- Designed and oversaw implementation of all projects associated with legislative advocacy, technical assistance, financial resources, media, and communications.

Volunteers of America of Minnesota – Charter School Sponsorship – Golden Valley, MN
Assistant Director, June 2006 – October 2006 / School Liaison, June 2005 – May 2006

- Responsible for academic, financial, and organizational accountability of 14 charter public schools operating throughout Minnesota.
- Provided consultation and guidance to statewide organizations and government agencies regarding charter school contract renewal, annual reporting procedures, and board oversight.
- Managed opening of five new public charter schools in 2005 and developed applications for approval of three additional schools in 2006 – including budgeting, strategic planning, goal development, federal grants, and accountability.
- Co-developed, wrote, and co-hosted 26 episodes of *CharterAmerica*, a weekly national webcast featuring news and issues related to public education reform.

Center for School Change, Humphrey Institute of Public Affairs – Minneapolis, MN
Director, Minnesota Charter School Resource Center, June 2004 – June 2005

- Worked with charter school operators, board members, and advocates to increase quality of programming and information sharing among the state's charter sector.
- Disseminated best practice information and relevant data to improve decision-making and operations in charter public schools.

Teach for America: Southern Vance High School – Henderson, NC
High School English Teacher, 2000 – 2002

- Managed implementation of school's inaugural college-prep program and taught potential first-generation, low-income college students as part of that project.
- Helped 9th grade students achieve highest End-of-Course test results in *English I* for 2000-01 and 2001-02 school years as part of the Teach for America program.

Additional Experience *Sprint PCS* – Kansas City, MO
Information Technology (IT) Logistics Coordinator, 1999 – 2000

Andersen Consulting – Washington, DC and Overland Park, KS
Change Management Analyst, 1998 – 1999

Education **Humphrey Institute of Public Affairs, University of Minnesota** – Minneapolis, MN
Master of Public Policy. Completion date: June, 2004
Awarded James E. Jernberg Fellowship for Public Service
Relevant Coursework: Nonprofit Management, Statistics, Strategic Planning, and Children and Families.

University of Kansas – Lawrence, KS
Bachelor of Arts. Completion date: December, 1997
Major: English Graduated *cum laude*

Key Activities and Recognition

HHH Institute of Public Affairs (2002 – 2006)

- Awarded James E. Jernberg Fellowship for Public Service
 - Provided full tuition, stipend, and assistantships.
- Elected to Alumni Board
- Elected Student Commencement Speaker
- Elected Public Affairs Student Association Treasurer
- Teaching and Research Assistantships
 - Strategic Planning for Public and Nonprofit Organizations
 - Leadership for the Common Good (acknowledged in "Leadership for the Common Good: Tackling Public Problems in a Shared Power World" – Crosby and Bryson, Jossey-Bass 2005).

University of Minnesota Daily, Columnist (2003 – 2004)
Bi-monthly columnist for newspaper with nation's highest university circulation.

Teach for America, North Carolina Corps (2000 – 2002)
Selected via competitive process to teach high school English in high-risk school district.

Sprint PCS, IT Peer Recognition Award (1999)

Board Member Name: Aaron North

Short Biographical Statement

Instructions

Please provide a short biographical statement of approximately 150-200 words (written in the third-person perspective). Any relevant information regarding your interest in education and/or serving the Kansas City community is especially appropriate.

Biographical Statement

As an independent consultant, Aaron worked with the Kauffman Foundation's School Design Team in the development of the Ewing Marion Kauffman School model. Aaron served as the founding Executive Director of the Missouri Charter Public School Association (MCPSA) from October 2006 – June 2009. Prior to leading the start-up effort at MCPSA, Aaron worked in Minnesota as a charter school sponsor, school resource center director, and in the Minnesota Department of Education's Office of Choice and Innovation. He also served as Board Secretary for an urban elementary charter school board in Minneapolis. Aaron taught high school English in rural North Carolina as a Teach for America corps member and worked for Andersen Consulting and Sprint PCS prior to his teaching experience. Aaron is a graduate of both the University of Kansas and the University of Minnesota's Humphrey Institute of Public Affairs. Aaron believes all students and families should have access to high quality public education options and his current efforts are dedicated to that end.

Request for Information from Prospective Charter School Board Members

Instructions

The Applicant's proposed governing board members are required to provide a current resume' detailing their qualifications and experiences and respond to the Request for Information that follows. Please be sure to submit these items together for each board member. Information on a proposed board member will not be considered unless complete information (resume' and completed Request for Information) is provided.

Request for Information from Prospective Charter School Board Members

Governing a public charter school requires commitment and responsibility. The governing board will be ultimately responsible for the sound education of all children enrolled in the school and for the responsible use of the public funds that the school receives. Your desire to serve on a charter school board indicates a belief in and commitment to quality public schools for all children. It also indicates a willingness to serve as a public official. We recognize the significance of those commitments and appreciate your willingness to take on the accompanying responsibility.

If the application is approved, the board will enter into a charter contract that establishes the terms under which the school will operate. Therefore, one purpose of the charter school application is to provide the sponsor a sense of the board's capacity to govern the school

effectively. With that purpose in mind, each prospective board member should respond to this request for information.

I. Background

- 1) Describe your educational and employment history. You may complete this item by attaching a resume'.
 - A. Please see resume' included with these materials.
- 2) If true, please affirm that you will be at least eighteen years old by January 1 of the year in which the proposed charter school would open.
 - A. I affirm I will be at least 18 years of age prior to January 1 of the year in which the proposed charter school will open.
- 3) How did you become aware of the proposed charter school and the opportunity to serve as a member of its board?
 - A. As an independent education consultant, I worked with the Kauffman Foundation in the early design phase of the school. As the time to officially incorporate the school and apply to a sponsor for approval approached, I was asked by the Foundation to serve on its founding board.
- 4) Explain why you would like to serve on the board.
 - A. Every student and family should be able to choose the public school best meeting their needs from a diverse portfolio of high quality options. The Kauffman School will provide a high quality option in Kansas City unlike anything previously available. In addition, it has every opportunity to serve as a catalyst to drive improvement in existing district/charter public schools, and serve as the template for new quality school development.
- 5) Have you previously served on a board of a school district or a not-for-profit corporation (including the board of a parochial or independent private school)? If so, describe any relevant experience. If you have not had any previous service, discuss why you wish to serve in this capacity.
 - A. Yes, in addition to my work in the charter school sponsorship program at Volunteers of America of Minnesota, I served as Board Secretary for a K-5 charter school in the city of Minneapolis from 2004-2006. I have also attended and/or facilitated over two dozen charter school board trainings as a sponsor, charter school resource center director, and state association director.
- 6) What is your understanding of the appropriate role of a public charter school board member?
 - A. A charter school board member is a decision-making public servant pursuant to R.S.Mo 105.450 and should conduct him/herself appropriately both inside and outside the school environment. Charter school boards are also required to observe Missouri's Sunshine Law (R.S.Mo 355). The primary roles of a charter school board are to set policies and approve an annual budget, hire and hold school leadership accountable for achieving measurable student goals and effectively operating the school within established policy and budgetary parameters, serve as public ambassadors of the school, and vote as appropriate to fulfill those duties in furtherance of the school's mission.

- 7) *What relevant knowledge and experience will you bring to the board?*
- A. My past experience includes service in the following capacities:
 - i. Founding Executive Director of Missouri's first statewide membership and professional association representing charter schools in both Kansas City and St. Louis;
 - ii. Asst. Director of a nationally-recognized charter school sponsoring institution overseeing fifteen schools throughout Minnesota;
 - iii. Director of the University of Minnesota's Charter School Resource Center;
 - iv. Two-years as a 9th/10th grade English teacher in a high school serving over 95% free/reduced lunch.
 - v. A variety of other roles and opportunities in public education.
- 8) *Assuming the school is successful, what is your image of how the school will look towards the end of the first year? What will it be like after four years?*
- A. After one year, the school will already be doing 90% of everything it will ever need to do in order to be successful – curriculum, instruction and assessment aligned to produce significant student gains; a shared culture of values and expectations among all staff and students; and a team of administrators and teachers working together and willing to do whatever it takes to see students succeed. The community is already demanding more options like the one provided by the Kauffman School.

After four years, the school is ready to matriculate its first group of eighth-graders into the inaugural high school year. Well over seventy-five percent of students enrolled for three consecutive years are assessed as proficient on the state's annual assessment. The school's community recognizes the culture and values of the Kauffman School and is positively influenced by them. Staff retention is high and a cadre of "master teachers" is emerging as the school matures.

II. Educational Philosophy

- 9) *What is your understanding of the school's mission and/or philosophy?*
- A. Briefly, the Kauffman School will catch kids up in the middle school grades and provide them with the kind of robust, intensely focused college preparatory high school that will ensure success in college and life. Within the college prep components, students will be exposed to a broad range of non-traditional concepts and subjects, and will be encouraged to explore their interests and build relationships with mentors and professionals engaged in the kind of activities students find interesting.
- 10) *Are you familiar with the school's proposed educational program? How would you describe it?*
- A. The school's education program is intense and is focused on preparing students in the middle grades for a college preparatory program at the high school level, which in turn will prepare them for success in college and life. Double coursework in English and math and several other strategies at the middle school level will help ensure students are performing at grade-level before progressing into the high school program.

- 11) *What are the characteristics of a successful school? What specific steps do you think the board will need to take in the first year or two to ensure that this school is successful?*
- A. Successful schools exhibit coherence between a shared culture of high expectations, an academic program and school-wide systems designed to help students meet those expectations, and the right people in place to effectively execute all aspects of the model. The Kauffman School Board of Directors will need to make sure they hire a school leadership team that already understands these elements of school success. In addition, the board will provide the resources, guidance, and oversight necessary to make certain the school embodies its mission and philosophy in all aspects of its start-up and operational endeavors.

III. Conflict of Interest Disclosure

- 12) *Do you or your spouse know any of the other prospective board members? If so, please indicate the name of the person and the relationship.*
- A. Yes, I have a professional relationship with Munro Richardson and Dr. Steven Green through the Ewing Marion Kauffman Foundation and Kauffman Scholars, Inc. respectively.
- 13) *Do you or your spouse have a pre-existing relationship with any people already identified as prospective school employees? If so, please so indicate and describe the relationship.*
- A. No, though the school is in its leadership recruitment phase and I am forwarding names of prospective candidates to the executive search firm facilitating the process.
- 14) *Do you or your spouse know anyone that plans to do business with the school? If so, please so indicate and describe the relationship and the nature of the potential business.*
- A. No. No business arrangements with the school have been established at this time.
- 15) *If the school proposes to partner with an educational service provider (a management company), do you or your spouse know any employees, owners, or agents of that provider? If so, please indicate the individuals you know and the nature of the relationship.*
- A. N/A
- 16) *(If the school does not intend to partner with an educational service provider, write "N/A").*
- A. Please see above
- 17) *If the school intends to partner with an educational service provider, do you or your spouse have a direct or indirect ownership, employment, contractual, or management interest in the educational service provider?*
- A. N/A
- 18) *(If the school does not intend to partner with an educational service provider, write "N/A").*
- A. Please see above
- 19) *Do you anticipate conducting any business with the educational service provider, the school, or both? If so, describe the potential relationship.*
- A. N/A. Please see above.
- 20) *Are there any potential ethical or legal conflicts of interest that you can foresee in the context of your service on the school's board? If so, explain.*

- A. No. Should a concern arise, I will consult with legal counsel and either alter my personal circumstances or remove myself from the board as appropriate.
- 21) *How would you handle a situation in which you believe one or more members of the school's board to be engaged in self-dealing (i.e. making arrangements involving the school that materially benefit the board member, his/her friends or family).*
- A. I would consult the school's conflict of interest policy and discuss the situation with legal counsel as appropriate.

Appendix B.2-4: CV and Request for Information from Prospective School Board Member, Munro Richardson

MUNRO C. RICHARDSON

6657 Cherry Street · Kansas City, Missouri · 64131 · (816) 804-1752 (mobile) · mrichardson@kauffman.org

Education	UNIVERSITY OF ILLINOIS AT URBANA-CHAMPAIGN <i>Candidate for Doctorate of Philosophy, Political Science, Expected 2010</i>
	OXFORD UNIVERSITY <i>Master of Philosophy, International Relations, June 1996.</i>
	HARVARD UNIVERSITY <i>Master of Arts, Regional Studies - East Asia, November 1995.</i>
	UNIVERSITY OF KANSAS <i>Bachelor of Arts, East Asian Languages and Cultures, May 1993. Highest Distinction.</i>
Professional Experience	EWING MARION KAUFFMAN FOUNDATION <i>Vice President, Education</i>
3/10 – Present	Develop and supervise the Foundation's strategic investments in K-12 education and youth entrepreneurship. Manage team of program officers responsible for multi-million dollar portfolio of grants. As member of senior leadership team, advise and assist CEO with operations of the Foundation. Represent the Foundation locally and nationally.
1/05 – 2/10	<i>Director</i> As a member of the senior leadership team, assist the president with the Foundation's local community grant making. Assist the Foundation with strategic programs in youth education. Conduct research into new program areas and special projects for the president's office. Manage an active portfolio of grants. Work with current and potential grantees. Assist with grant review and evaluation processes. Represent the Foundation locally and nationally.
8/03-12/04	<i>Deputy Director, Kauffman Scholars, Inc.</i> Second-in-command during start-up of new \$70 million college access program. Developed administrative rules and operational procedures. Directly managed organization's budget and finances. Supervised staff that worked with nearly 200 middle school students. Developed and managed inaugural summer school program. Built and maintained relationships with school officials, universities, students, families, and community partners. Represented the program internally within the foundation and externally with the community-at-large.
12/02 – 7/03	<i>Director of Special Projects</i> Reported directly to the president on key strategic projects for the foundation. As a member of the senior leadership team, responsible for helping to implement the Foundation's new strategic direction. Assisted the president with research,

evaluation, and execution of various projects across the organization. Worked with staff and community partners to develop programs and initiatives that offered potential to make a significant impact on community problems.

1/00 – 05/02

BCT PARTNERS, LLC

Co-Founder and Executive Vice President

Co-founder of company that provided technology services to nonprofit organizations. Principal responsible for financial management of the company. Shared administrative and business development duties with Chief Executive Officer. Assisted with marketing, sales and customer relationship management. Played leadership role in strategic planning, product development and project management.

7/98-1/00

GREATER KANSAS CITY COMMUNITY FOUNDATION

Manager of Community Leadership

Coordinated the development and implementation of the Foundation's community leadership initiatives. Developed community leadership agenda for the organization with the President and Board of Directors. Represented the Foundation on selected community initiatives. Tracked and participated on key economic and community development issues. Managed a number of competitive grant making processes. Developed and maintained relationships with key non-profit and government agencies, funders and community leaders. Work with board, staff and community partners to leverage the Foundation's philanthropic resources and relationships to create high-payoff, high-impact opportunities in the community.

4/97-7/98

U.S. SENATE COMMITTEE ON FOREIGN RELATIONS

Professional Staff Member

As member of minority committee staff, assisted and advised Senator Joseph R. Biden (D-Del.) in his capacity as ranking minority member on the U.S. Senate Committee on Foreign Relations. Had primary responsibility for human rights, refugees, foreign aid, humanitarian assistance and African issues. Composed speeches, statements and op-eds for Senator Biden. Represented the Senator in meetings with representatives of foreign governments, non-governmental organizations and executive branch agencies and departments. Worked with other committee staff and relevant congressional offices in the conduct of committee hearings and briefings. Traveled to North Korea in October 1997 as member of U.S. government food needs assessment team. Traveled to Democratic Republic of Congo in February 1998 as part of committee staff delegation to assess humanitarian and political situation.

8/96-1/97

U.S. SENATOR NANCY LANDON KASSEBAUM

Legislative Assistant

Assisted and advised Senator Nancy Landon Kassebaum (R-Kan.) in her capacity as Chairman of the Senate African Affairs Subcommittee. Responded to inquiries and requests from constituents, non-governmental organizations and others. Met

6/95 – 9/95	<p>with lobbyists, executive branch personnel and others concerning African policy issues. Worked with the Senate Foreign Relations Committee and other congressional offices concerned with African affairs.</p> <p>UNITED STATES DEPARTMENT OF STATE <i>Intern, U.S. Embassy in Beijing, China</i> Assisted U.S. Foreign Service officers in the duties of the political section of the Embassy. Attended weekly briefings of the Chinese Ministry of Foreign Affairs and transcribed proceedings into official diplomatic cables. Aided preparations for the September 1995 United Nations Women's Conference held in Beijing, China. Assisted visiting U.S. congressional delegations, including service as tour guide and Chinese language interpreter for U.S. Senator Nancy Kassebaum.</p>
Academic Honors	<p>2008 Rita and Leonard Ogren Award for Academic Achievement, Department of Political Science, University of Illinois at Urbana-Champaign 1994 Rhodes Scholar 1994 Marshall Scholar (declined to accept Rhodes Scholarship) 1993 Andrew W. Mellon Fellow in the Humanities 1993 Phi Beta Kappa 1992 Golden Key National Honor Society (top 15% of junior class) 1992 Henry S. Nelson Award (top student third-year Mandarin Chinese) 1991 Grace Wan Award (top student second-year Mandarin Chinese) 1990 University Scholar (top 20 sophomores) 1989 National Achievement Scholar (for top African-American students) 1989 National Merit Semifinalist</p>
Civic Honors	<p>2000 Up and Comers Award (Kansas City Business Journal)</p>
Civic Activities	<p>Advisory Board, Confucius Institute, Univ. of Kansas (2006-Present) Board of Directors, Kansas City Tomorrow Alumni Association (2005–2006) Participant, Kansas City Tomorrow, Civic Council of Kansas City (2003-2004) Board of Directors, United Inner City Services (2000-2002) Board of Directors, Hispanic Economic Development Corp. (12/2000 – 6/2002) Board of Directors, Kansas City International Relations Council (2000-2002) City Plan Commission, Kansas City, Missouri (2/2000 – 2/2001) Mayor's Citizen Advisory Committee on Public Safety Facilities (July 2000) Technology Task Force, KCMO School District (March 2000 – Feb. 2001) Technology Task Force, Boys & Girls Clubs of GKC (June 2001- June 2002) Park University, Nonprofit MPA Advisory Committee (2000 – 2005)</p>
Professional Memberships	<p>American Association of Rhodes Scholars American Political Science Association Midwest Political Science Association</p>
Publications	<p>"Difficulties of Peace-Keeping: Chinese Involvement in Cambodia", <i>Oxford International Review</i>, Spring 1996.</p>

Board Member Name: Munro Richardson

Short Biographical Statement

Instructions

Please provide a short biographical statement of approximately 150 words (written in the third-person perspective). Any relevant information regarding your interest in education and/or serving the Kansas City community is especially appropriate.

Biographical Statement

Munro Richardson is Vice President of Education at the Ewing Marion Kauffman Foundation. Richardson is responsible for the development and supervision of the Foundation's strategic investments in K-12 education and youth entrepreneurship. Richardson assisted with development of several major education programs, including Kauffman Scholars and the Foundation's math and science education initiative. Previously, he served as deputy director of Kauffman Scholars, Inc. during its demanding startup phase to guide the program's administration, operations, and finances.

Richardson is a graduate of Lincoln College Preparatory Academy in Kansas City, MO. At the post-secondary level, he graduated Phi Beta Kappa from the University of Kansas where he received a B.A. in East Asian Languages and Cultures (highest distinction); an M.A. in East Asian Studies from Harvard University as an Andrew W. Mellon Fellow; an M.Phil. in International Relations from Oxford University as a Rhodes Scholar; and currently is a Ph.D. candidate in political science at the University of Illinois at Urbana-Champaign. He lives in Kansas City, MO with his wife and three daughters.

Instructions

The Applicant's proposed governing board members are required to provide a current resume' detailing their qualifications and experiences and respond to the Request for Information that follows. Please be sure to submit these items together for each board member. Information on a proposed board member will not be considered unless complete information (resume' and completed Request for Information) is provided.

Request for Information from Prospective

Governing a public charter school requires commitment and responsibility. The governing board will be ultimately responsible for the sound education of all children enrolled in the school and for the responsible use of the public funds that the school receives. Your desire to serve on a charter school board indicates a belief in and commitment to quality public schools for all children. It also indicates a willingness to serve as a public official. We recognize the significance of those commitments and appreciate your willingness to take on the accompanying responsibility.

If the application is approved, the board will enter into a charter contract that establishes the terms under which the school will operate. Therefore, one purpose of the charter school application is to provide the sponsor a sense of the board's capacity to govern the school

effectively. With that purpose in mind, each prospective board member should respond to this request for information.

I. Background

- 1) *Describe your educational and employment history. You may complete this item by attaching a resume'.*
 - A. Please see resume' included with these materials.
- 2) *If true, please affirm that you will be at least eighteen years old by January 1 of the year in which the proposed charter school would open.*
 - A. I affirm I will be at least 18 years of age prior to January 1 of the year in which the proposed charter school will open.
- 3) *How did you become aware of the proposed charter school and the opportunity to serve as a member of its board?*
 - A. I lead the design work for the charter school at the Kauffman Foundation.
- 4) *Explain why you would like to serve on the board.*
 - A. I want to ensure that the school has a successful start-up. From an operations standpoint, I want to make sure that the policies and procedures are in place to establish the long-term viability of the school. From an instructional standpoint, I want to ensure that the school establishes the appropriate structures, systems and culture for a high-performing charter school.
- 5) *Have you previously served on a board of a school district or a not-for-profit corporation (including the board of a parochial or independent private school)? If so, describe any relevant experience. If you have not had any previous service, discuss why you wish to serve in this capacity.*
 - A. Yes, I have served on several non-profit boards of directors over the past decade. I was a member of the board for the following nonprofit organizations: United Inner City Services, Hispanic Economic Development Corporation, Kansas City International Relations Council, Kansas City Tomorrow Alumni Association. I also served for one year on a public board, the Kansas City Plan Commission.
- 6) *What is your understanding of the appropriate role of a public charter school board member?*
 - A. To set school policies, hold the school leadership accountable for academic outcomes, and oversee the financial and organizational management of the school.
- 7) *What relevant knowledge and experience will you bring to the board?*
 - A. I have a deep understanding of the school model, given my first-hand involvement with the design of the school. I also have worked in the community for the past 12 years, starting with my work at the Greater Kansas City Community Foundation through my tenure at the Ewing Marion Kauffman Foundation. My experience with Kauffman Scholars, Inc. also helps me to understand the challenges that young people in urban environments face with regards to education. Moreover, my own experiences growing up in the eastern part of Kansas City gives me a deep understanding—and sense of urgency—with regards to urban education.

- 8) *Assuming the school is successful, what is your image of how the school will look towards the end of the first year? What will it be like after four years?*
- A. After the first year, the school has established solid structures, systems and school-wide and classroom cultures all focused on the school's mission. Every classroom exhibits fidelity to three core principles of the school—rigor, engagement, and urgency. As a result, the school is able to demonstrate solid academic growth (at least 1.5 years) in its students relative to where they started at the beginning of the school year. After year four, the Kauffman School is recognized locally and nationally for consistently delivering solid results for students and their families.

II. Educational Philosophy

- 9) *What is your understanding of the school's mission and/or philosophy?*
- A. The mission of the Kauffman School is to prepare students to excel academically, graduate college, and apply their unique talents in the world to create economically independent and personally fulfilling lives.
- The goal of the school is to produce globally competent students who are prepared for the rigors of college and life and in charge of their own learning. They will be financially literate, technologically literate, conversant in a foreign language, and prepared to contribute to their community.
- 10) *Are you familiar with the school's proposed educational program? How would you describe it?*
- A. The school's educational program is best characterized as college prep and life prep. We want to prepare students for the rigors of college. Our framework for college preparation is informed by the College Board. We also want to prepare our students for life, which we refer to as "life prep." This means helping them to discover their passions and how to apply them in the world. It also means helping them to make good decisions so that they make the most of their talents and the opportunity we are providing through the Kauffman School.
- 11) *What are the characteristics of a successful school? What specific steps do you think the board will need to take in the first year or two to ensure that this school is successful?*
- A. Successful schools have five characteristics:
- 1) A clear sense of mission and a broadly shared institutional culture dedicated to the achievement of the school's mission.
 - 2) A set of organizational outcome-focused structures and systems that support student learning.
 - 3) A set of classroom procedures that maximizes time on task and tightly links classroom curricula to state standards.
 - 4) A family network that is aware of and willing to carry out their responsibility in support of their children.
 - 5) A collection of purposefully chosen teachers and administrators who fit the organization's objectives and exhibit a passionate commitment to the school's goals.

Ninety percent of what is required to build a successful school happens in the first year. The board's role is not to micro-manage. The board's primary responsibility is to hire and support strong leaders, and hold them accountable for outcomes. The school board must be focused on making sure the necessary structures and systems are put in place, and that there is coherence between these (cemented by a strong school and classroom-based culture) so that the school is characterized by academic rigor, student engagement, and shared urgency by adults and students.

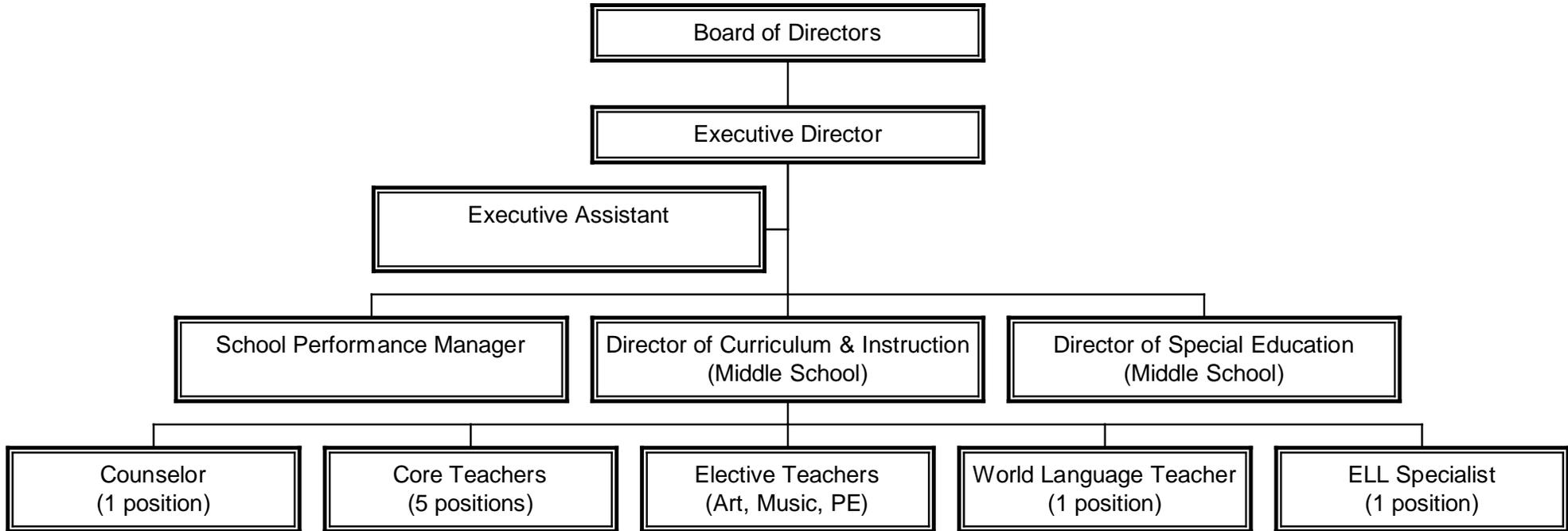
III. Conflict of Interest Disclosure

- 12) *Do you or your spouse know any of the other prospective board members? If so, please indicate the name of the person and the relationship.*
 - A. Steve Green, colleague at the Kauffman Foundation
Aaron North, consultant engaged by the Kauffman Foundation
Jorge Cadenas, board member of Kauffman Scholars, Inc.
- 13) *Do you or your spouse have a pre-existing relationship with any people already identified as prospective school employees? If so, please so indicate and describe the relationship.*
 - A. Hannah Lofthus, former Kauffman Foundation intern
- 14) *Do you or your spouse know anyone that plans to do business with the school? If so, please so indicate and describe the relationship and the nature of the potential business.*
 - A. No. No business arrangements with the school have been established at this time.
- 15) *If the school proposes to partner with an educational service provider (a management company), do you or your spouse know any employees, owners, or agents of that provider? If so, please indicate the individuals you know and the nature of the relationship.*
 - A. N/A
- 16) *(If the school does not intend to partner with an educational service provider, write "N/A").*
 - A. Please see above
- 17) *If the school intends to partner with an educational service provider, do you or your spouse have a direct or indirect ownership, employment, contractual, or management interest in the educational service provider?*
 - A. N/A
- 18) *(If the school does not intend to partner with an educational service provider, write "N/A").*
 - A. Please see above
- 19) *Do you anticipate conducting any business with the educational service provider, the school, or both? If so, describe the potential relationship.*
 - A. N/A. Please see above.
- 20) *Are there any potential ethical or legal conflicts of interest that you can foresee in the context of your service on the school's board? If so, explain.*
 - A. No

- 21) *How would you handle a situation in which you believe one or more members of the school's board to be engaged in self-dealing (i.e. making arrangements involving the school that materially benefit the board member, his/her friends or family).*
- A. I would follow the school's conflict of interest policy and immediately contact the board chair and outside counsel.

Appendix B.3-1: Kauffman School Organizational Chart

The Kauffman School - Year 1 Organizational Chart



Appendix B.3-2: Executive Director Position Description



Executive Director The Ewing Marion Kauffman School

The Ewing Marion Kauffman School, a charter public school opening in fall 2011, seeks a visionary and highly effective Executive Director to join its leadership team. The Executive Director is responsible for the overall start-up, administration, and management of the Kauffman School, including school philosophy, school design, academic programs, staffing, operations, and culture. This person will be charged with founding a high-performing urban charter school unrelentingly focused on student achievement. The mission of the Kauffman School is to prepare students to excel academically, graduate college, and apply their unique talents in the world to create economically independent and personally fulfilling lives.

Areas of responsibility include board relations, policy development, staff and organization evaluation, fiscal management, and outreach to internal and external stakeholders. The Executive Director reports to the Kauffman School Board of Directors. This is a full-time, exempt position located in Kansas City, MO.

Responsibilities:

Communications and Outreach

- Play leadership role at local, state and national levels regarding charter schools and urban education
- Actively participate in Kauffman Foundation-supported research and evaluation of the charter school
- Serve as key spokesperson for the Kauffman School and liaison to the community
- In conjunction with Director of Curriculum and Instruction, develop "school report card" format and distribution system for dissemination of school information to media, general public, and key stakeholders
- In conjunction with Director of Curriculum and Instruction, coordinate all staff communications related to academic programming, assessment, and outcomes

Educational Leadership

- Build and support a strong school culture focused on academic achievement
- Supervise direction of teaching and learning in the school
- Manage and support the Director of Curriculum and Instruction in the following areas:
 - Manage and evaluate teaching staff
 - Provide instructional leadership to advance proven teaching and learning practices
 - Observe classes and teachers regularly
 - Set standards for student achievement and monitor progress of all students
 - Facilitate data-driven discussions and planning regarding student performance
 - Design professional development plans and programming for individual teachers to address deficits, build on strengths, and become more effective and successful team members

Koya Consulting | 44 Merrimac Street | Newburyport, MA 01950
www.koyaconsulting.com
978.465.7500

- o Work with parents and the community to achieve maximum involvement in support of student performance
- o Guide curriculum development, implementation, and evaluation

Organizational Leadership

- Be the standard bearer of the school's philosophy and culture – personally exceeding expectations the school has for students and staff
- Work with the Director of Curriculum and Instruction to create a team of teachers and administrators sharing the Kauffman School philosophy and willing to do “whatever it takes” to help students succeed
- Ensure coherence of school philosophy, mission, goals, and activities
- Identify and implement ways to enhance and enrich the school's shared values and principles
- Work with Kauffman School Board to develop policies and set organizational priorities
- Coordinate and report at all board meetings
- Develop succession planning strategies and build on the leadership potential of teaching staff

Administrative and Financial Leadership

- Work with the Kauffman School Board of Directors to develop and manage the school's budget and annual cash flow projections
- Present budget and cash flow updates at monthly school board meetings, including explanations for budget variances
- Develop relationships with finance staff at Missouri Department of Elementary and Secondary Education
- Monitor policy and funding changes and aligned training opportunities
- Oversee all programs, services, and activities to ensure school goals and objectives are met
- Ensure compliance with all statutory regulations and requirements
- Manage human resources
- Manage student recruitment and enrollment process
- Facilitate a safe and orderly school environment

Qualifications:

- Previous school leadership experience working in charter school sector, or comparable public/private school
- Deep experience in charter school operations (start-up, fiscal responsibility, development, charter renewal, academics)
- Commitment to quality education for all students
- Demonstrated success in public education reform efforts and nonprofit organizational leadership.
- Executive team leadership and organizational management experience
- Master's Degree preferred

Koya Consulting | 44 Merrimac Street | Newburyport, MA 01950
 www.koyaconsulting.com
 978.465.7500

In addition, highly qualified candidates will demonstrate:

- Leadership that reflects shared values and beliefs embedded in Kauffman School philosophy
- A results-oriented approach with a track record of achieving goals
- A strategic approach and highly motivated personality; capable of seeing projects through from beginning to end
- Solid analytical, communication, and negotiation skills
- Maturity, humility, professionalism, confidence, and a strong work ethic

Compensation and Benefits:

Salary is competitive and commensurate with experience, and includes excellent benefits.

To Apply:

The Kauffman School has engaged Koya Consulting to help in this hiring process. Please send a compelling cover letter and resume to Molly Brennan at executivesearch@koyaconsulting.com.

The Kauffman School is an equal opportunity employer and diverse candidates are strongly encouraged to apply.

About The Kauffman School:

Inspired by the Ewing Marion Kauffman Foundation and set to open in fall 2011, the Kauffman School prepares students to be intellectually curious, economically independent, and confidently self-directed. The Kauffman School will enroll seventy-five fifth graders in the first year and grow one grade per year initially to serve grades five through twelve. In addition, the school will explore future development of a K-4 component. At full capacity, the Kauffman School will graduate about one hundred high school seniors each year. The target population is urban students residing in low-income households, with a focus on college prep and life prep curriculum. The Kauffman Foundation will provide funding for start-up and early operations, as well as help identify and acquire a facility for the school. The Kauffman Foundation will make application for the school's charter in spring 2010. The school's opening in fall 2011 is subject to approval of the application by a sponsor and the Missouri Department of Elementary and Secondary Education. For more information about the Kauffman Foundation, please visit <http://www.kauffman.org>.

About Koya Consulting:

Koya Consulting is a national retained search and consulting firm that works exclusively with non-profits and social enterprises. We deliver measurable results, finding exceptionally talented people who truly fit the unique culture of our client organizations. For more information about Koya Consulting, please visit www.koyaconsulting.com.

Koya Consulting | 44 Merrimac Street | Newburyport, MA 01950
www.koyaconsulting.com
978.465.7500

Appendix B.3-3: Director of Curriculum and Instruction Position Description



Director of Curriculum and Instruction The Ewing Marion Kauffman School

The Ewing Marion Kauffman School, a charter public school opening in fall 2011, seeks a Director of Curriculum and Instruction. He or she is responsible for the success of the academic program at the Kauffman School. This person will be charged with co-founding a high-performing urban charter school unrelentingly focused on student achievement. The mission of the Kauffman School is to prepare students to excel academically, graduate college, and apply their unique talents in the world to create economically independent and personally fulfilling lives.

Areas of responsibility include curriculum development and refinement, scope and sequence, student assessment, performance data processing and integration, professional development, and management and evaluation of instructional staff. The Director of Curriculum and Instruction will report to the Executive Director. This is a full-time, exempt position located in Kansas City, MO.

Responsibilities:

Educational Leadership

- Provide instructional leadership to advance proven teaching and learning practices
- Hire, manage and evaluate teaching staff in partnership with the Executive Director
- Observe classes and teachers frequently
- Set standards for student achievement and monitor progress of all students
- Facilitate data-driven discussions and planning regarding student performance
- Design professional development plans and programming for individual teachers to address deficits, build on strengths, and become more effective and successful team members
- Work with parents and the community to achieve maximum involvement in support of student performance
- Coordinate all academically oriented clubs and extracurricular activities

Curriculum Development and Assessment

- Develop curriculum based on established framework, state standards, and philosophy of the Kauffman School during start-up year
- Understand effective strategies from other successful school models and incorporate as appropriate
- Coordinate and oversee the three phases of academic assessment at the Kauffman School (annual growth, proficiency over multiple years, and quarterly comprehensive assessments)
- Manage assessment data and lead instructional staff in developing strategies to address student performance shortfalls
- Recalibrate curriculum based on performance, changing standards, and emerging circumstances at the Kauffman School

Koya Consulting | 44 Merrimac Street | Newburyport, MA 01950
www.koyaconsulting.com
978.465.7500

Communications and Outreach

- Develop transparent reporting system to families and stakeholders regarding both individual student and overall school performance
- Create mechanisms for regular parent communications with teaching staff
- In conjunction with Executive Director, develop “school report card” format and distribution system for dissemination of school information to media, general public, and key stakeholders
- In conjunction with Executive Director, coordinate staff communications related to academic programming, assessment, and outcomes
- Coordinate and oversee progress reports, report cards, and parent/teacher conference scheduling

Qualifications:

- Previous school leadership experience working in charter school sector, or comparable public/private school
- Deep experience in charter school operations (start-up, development, renewal, academics)
- Commitment to quality education for all students
- Demonstrated success in public education reform efforts and nonprofit organizational leadership
- Master’s Degree preferred

In addition, highly qualified candidates will demonstrate:

- Leadership that reflects shared values and beliefs embedded in Kauffman School philosophy
- A results-oriented approach with a track record of achieving goals
- A strategic approach and highly motivated personality; capable of seeing projects through from beginning to end
- Solid analytical, communication, and negotiation skills
- Maturity, humility, professionalism, confidence, and a strong work ethic

Compensation and Benefits:

Salary is competitive and commensurate with experience, and includes excellent benefits.

To Apply:

The Kauffman School has engaged Koya Consulting to help in this hiring process. Please send a compelling cover letter and resume to Molly Brennan at executivesearch@koyaconsulting.com.

The Kauffman School is an equal opportunity employer and diverse candidates are strongly encouraged to apply.

Koya Consulting | 44 Merrimac Street | Newburyport, MA 01950
www.koyaconsulting.com
978.465.7500

About The Ewing Marion Kauffman School:

Inspired by the Ewing Marion Kauffman Foundation and set to open in fall 2011, the Kauffman School prepares students to be intellectually curious, economically independent, and confidently self-directed. The Kauffman School will enroll seventy-five fifth graders in the first year and grow one grade per year initially to serve grades five through twelve. In addition, the school will explore future development of a K-4 component. At full capacity, the Kauffman School will graduate about one hundred high school seniors each year. The target population is urban students residing in low-income households, with a focus on college prep and life prep curriculum. The Kauffman Foundation will provide funding for start-up and early operations, as well as help identify and acquire a facility for the school. The school's opening in fall 2011 is subject to approval of the application by a sponsor and the Missouri Department of Elementary and Secondary Education. For more information about the Kauffman Foundation, please visit <http://www.kauffman.org>.

About Koya Consulting:

Koya Consulting is a national retained search and consulting firm that works exclusively with non-profits and social enterprises. We deliver measurable results, finding exceptionally talented people who truly fit the unique culture of our client organizations. For more information about Koya Consulting, please visit www.koyaconsulting.com.

Koya Consulting | 44 Merrimac Street | Newburyport, MA 01950
www.koyaconsulting.com
978.465.7500

Appendix B.4-1: Kauffman School Ten-Year Staffing/Enrollment Summary

Staffing Summary	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Executive Director	1	1	1	1	1	1	1	1	1	1	1
Executive Assistant	0	1	1	1	1	1	1	1	1	1	1
Director of Operations (Middle School)	0	0	0	1	1	1	1	1	1	1	1
Director of Operations (High School)	0	0	0	0	0	1	1	1	1	1	1
Director of Special Education (Middle School)	0	1	1	1	1	1	1	1	1	1	1
Director of Special Education (High School)	0	0	0	0	0	1	1	1	1	1	1
School Performance Manager	0	1	1	1	1	1	1	1	1	1	1
College Prep Coordinator	0	0	1	1	1	1	1	1	1	1	1
Director of Curriculum & Instruction (Middle School)	1	1	1	2	2	2	2	2	2	2	2
Director of Curriculum & Instruction (High School)	0	0	0	0	0	1	1	1	1	1	1
Core Teachers	0	5	10	18	26	33	37	42	46	48	50
Teaching Aides	0	0	0	4	6	10	11	12	12	12	12
ELL Specialist	0	1	1	2	2	3	3	3	3	3	3
World Language Teacher	0	1	1	2	2	3	3	3	4	4	4
Advisory Coordinator	0	0	0	0	0	0	1	1	1	1	1
Counselor	0	1	1	2	2	4	4	4	4	4	4
Elective Teacher	0	3	3	3	3	5	5	5	5	5	5
Total Staff	2	16	22	39	49	69	75	81	86	88	90
Students Served by Grade Level											
5th Grade	0	75	75	150	150	150	150	150	150	150	150
6th Grade	0	0	75	75	150	150	150	150	150	150	150
7th Grade	0	0	0	75	75	150	150	150	150	150	150
8th Grade	0	0	0	0	75	75	150	150	150	150	150
9th Grade	0	0	0	0	0	63	67	135	135	135	135
10th Grade	0	0	0	0	0	0	56	60	121	121	121
11th Grade	0	0	0	0	0	0	0	50	54	108	108
12th Grade	0	0	0	0	0	0	0	0	45	48	97
Total Students	0	75	150	300	450	588	723	845	955	1,012	1,061
Students Served by School Type											
Middle School	0	75	150	300	450	525	600	600	600	600	600
High School	0	0	0	0	0	63	123	245	355	412	461
Total Students	0	75	150	300	450	588	723	845	955	1,012	1,061
Student Ratios											
Student:Core Teacher Ratio	0	15	15	17	17	18	20	20	21	21	21
Student:Total Staff Ratio	0	5	7	8	9	9	10	10	11	12	12

Appendix B.4-2: SAMPLE Kauffman School Personnel Policies Excerpt

SAMPLE Kauffman School Personnel Policies¹

Introduction and Statement of Employment

This Staff Handbook is intended to help each employee become acquainted with the Ewing Marion Kauffman School (Kauffman School). It provides a general description of the Kauffman School's employment policies and guidelines. We trust this manual will serve as a useful reference document throughout your employment with the Kauffman School. Please read it with care; it is your responsibility to be in compliance with the policies and procedures it describes.

Employment with the Kauffman School is "at-will." The Kauffman School and its employees mutually retain the right to terminate their employment at any time with or without notice and with or without reason. Unless set forth in writing and signed by the Executive Director, employment at the Kauffman School is for no specific period of time, and any statement inconsistent with this policy is unauthorized. Throughout this SAMPLE handbook, policies are stated regarding specific actions, which may result in termination of employment. These policies in no way limit or alter the Kauffman School's at-will policy.

This handbook summarizes the policies and procedures that are in effect as of August 1, 2010. None of the benefits or policies in this manual are intended by reason of their publication to confer any rights or privileges or to entitle the employee to be or remain employed by the Kauffman School. The contents of this manual are presented as a matter of information only. With the exception of the at-will employment policy, the plans, policies, and procedures described herein are not conditions of employment and are subject to change by the Kauffman School.

If you are uncertain about any policies or procedures, whether or not they are referred to in this manual, please direct your questions to the Executive Director.

Equal Opportunity Employment

The Kauffman School is an equal opportunity employer and makes employment decisions on the basis of merit. The Kauffman School seeks to have the best available person in every job. The Kauffman School's policy prohibits discrimination based on race, color, creed, gender, marital status, age, national origin, physical or mental disability, medical condition, ancestry, religion, sexual orientation, or any other consideration made unlawful by federal, state, or local law or ordinance or regulation.

The Kauffman School is committed to complying with all applicable laws providing equal employment opportunities to individuals regardless of race, color, creed, gender, marital status, age, national origin, physical or mental disability, medical condition, ancestry, religion, or sexual orientation. This commitment applies to all persons involved in the operations of the Kauffman School and prohibits unlawful discrimination by any employee of the Kauffman School.

¹ This document presents policies, procedures, and language developed by the KIPP Foundation and Excel Academy (Boston, MA). Kauffman School leadership will develop official school policies during the start-up year, though the concepts presented in this document reflect fundamental expectations of the Kauffman School and align to the model presented in the attached application.

Reasonable Accommodation of Disability

To comply with applicable laws ensuring equal employment opportunities to qualified individuals with a disability, the Kauffman School will make reasonable accommodations for the known physical or mental limitations of an otherwise qualified individual with a disability who is an applicant or an employee unless undue hardship to the Kauffman School would result. Any applicant or employee who requires an accommodation in order to perform the essential functions of the job should contact the Executive Director and request such an accommodation.

Conflict of Interest

Employees have an obligation to conduct Kauffman School business within guidelines that prohibit actual or potential conflicts of interest. The purpose of these guidelines is to provide general direction so that employees can seek further clarification on issues related to the subject of acceptable standards of operation.

An actual or potential conflict of interest occurs when an employee is in a position to influence a decision that may result in a personal gain for that employee or for a relative as a result of the School's dealings. For the purposes of this policy, a relative is any person who is related by blood or marriage, or whose relationship with the employee is similar to that of persons who are related by blood or marriage.

No "presumption of guilt" is created by the mere existence of a relationship with outside organizations. However, if an employee has any influence on transactions involving purchases, contracts, or leases, it is imperative that the employee disclose to the Executive Director as soon as possible the existence of any actual or potential conflict of interest so that safeguards can be established to protect all parties.

Personal gain may result not only in cases where an employee or relative has a significant ownership in a firm with which the Kauffman School does business, but also when an employee or relative receives any kickback, bribe, substantial gift, or special consideration as a result of any transaction or business dealings involving the Kauffman School.

The data, designs, plans, ideas, and materials of the Kauffman School are the property of the Kauffman School and should never be given to an outside firm or individual. Any improper transfer of material or disclosure of information, even though it is not apparent that an employee has personally gained by such action, constitutes unacceptable conduct.

Harassment

The Kauffman School prohibits sexual harassment and harassment based on race, color, creed, gender, marital status, age, national origin, physical or mental disability, medical condition, ancestry, religion, sexual orientation, or any other consideration made unlawful by federal, state, or local law or ordinance or regulation. The Kauffman School's anti-harassment policy applies to all persons involved in the operation of the Kauffman School and prohibits harassment by any employee of the Kauffman School, as well as by any person doing business with or for the Kauffman School. Prohibited harassment includes, but is not limited to, the following behavior:

- Verbal conduct such as epithets, derogatory jokes or comments, slurs or unwanted sexual advances, invitations or comments.

- Visual conduct such as derogatory and/or sexually-oriented e-mails, posters, photography, cartoons, drawings or gestures.
- Physical conduct such as assault, unwanted touching, blocking normal movement or interfering with work because of gender, race, or any other protected basis.
- Threats and demands to submit to sexual requests as a condition of continued employment, or to avoid some other loss, and offers of employment benefits in return for sexual favors; and
- Retaliation for having reported or threatened to report harassment.

If any employee believes that he/she has been subjected to any form of unlawful discrimination or harassment, the employee is requested to report such incident(s). The Kauffman School will immediately undertake an investigation of the harassment allegations and attempt to resolve the situation. If the Kauffman School determines that unlawful harassment or discrimination has occurred, disciplinary action will be taken in accordance with the circumstances involved.

The Kauffman School encourages all employees to report any and all incidents of harassment or discrimination forbidden by this policy immediately so that complaints can be quickly and fairly resolved. Each employee should also be aware that the Federal Equal Employment Opportunity Commission investigates harassment and/or discrimination in employment. If an employee thinks he has been harassed, discriminated against, or retaliated against for resisting or complaining, the employee may file a complaint with the appropriate agency.

Immigration Reform and Control Act

The Immigration Reform and Control Act of 1986 (IRCA) prohibits the Kauffman School from employing any person not legally authorized to work in the United States. In accordance with the requirements of IRCA, all persons commencing or resuming work after November 6, 1986, must submit to Kauffman School documentation evidencing their right to work in the United States. Anyone submitting false documentation shall have employment immediately terminated. In fulfilling its obligations under IRCA, the Kauffman School reaffirms its commitment to comply with both state and federal non-discrimination laws. The Kauffman School does not discriminate on the basis of citizenship. Any questions concerning IRCA and the required documentation should be directed to the Executive Director.

Workplace Safety and Health

The Kauffman School has established a policy of providing a safe work place for all employees based on current federal, state, and local standards as well as proven "common sense" safety practices. The Kauffman School strives to maintain working conditions which afford all employees and members a reasonable degree of comfort and protection from injury or dangerous situations while assuring orderly and efficient performance of duties. However, it is only through the combined efforts and interest of all employees that we can continue to make the Kauffman school a safe place in which to work. Employees are expected to work safely observe safety regulations, and report unsafe conditions. Any unsafe condition must immediately be reported to the Executive Director.

Smoking Policy

The School is committed to enforcing the provisions of the state and local law regarding smoking in the workplace. Accordingly, the Kauffman School's policy on smoking is as follows:

- It is recognized that smoking is dangerous to the health of the smoker and that second-hand smoke is a cause of disease, including lung cancer, in healthy nonsmokers. The simple separation of smokers and nonsmokers within the same air space may reduce, but does not eliminate, the exposure of nonsmokers to environmental tobacco smoke. This applies to all smoking tobacco products, i.e., cigarettes, cigars, and pipes. This policy has been developed to protect all persons from the exposure to environmental tobacco smoke and to ensure a safe working environment.
- Smoking is prohibited in all facilities and areas of the entire workplace with no exceptions. Smoking is not permitted anywhere at the Kauffman School, including all common work areas, elevators, hallways, vehicles, restrooms, conference and meeting rooms, and all other enclosed or outdoor areas in the workplace. The policy applies to all employees, consultants, contractors, and visitors.
- Any disputes involving smoking will be referred to an immediate supervisor.
- No person or employer shall discharge, refuse to hire, refuse to serve, or in any manner retaliate against any employee, applicant or student because such employee, applicant or student takes any action in furtherance of the enforcement of this regulation or exercises any right conferred by this regulation.
- The Kauffman School encourages all smoking employees to quit smoking. The Kauffman School is available to provide you with contact information for Smoking Cessation resources and self-help materials for those employees who want to quit. For further information about these services please contact the Director of Operations or Executive Director.
- Any questions regarding the smoke-free workplace policy should be directed to the Director of Operations or Executive Director.

Alcohol and Drug-Free Workplace Policy

The Kauffman School has an obligation to provide an environment that is free of illegal drugs and alcohol. Illegal drugs and alcohol abuse compromises employee productivity, threatens the quality of our services, and invites the risk of injury or damage to Kauffman School students, employees, and property. Possessing, consuming, selling, attempting to sell, or distributing illegal drugs, as well as being under the influence of a controlled substance or alcohol during work hours, or on Kauffman School premises is strictly prohibited. Employees are expected to remain responsible, professional, and sober at all times. Consumption of alcohol on Kauffman School field trips or sponsored events is prohibited. The Kauffman School reserves the right at all times and without prior notice to inspect any and all property for the purpose of determining if this policy or any other Kauffman School policy has been violated. Such inspections may be conducted during or after business hours and in the presence or absence of the employee. All containers, including but not limited to bags, boxes, purses, briefcases, lunch containers, etc brought on to Kauffman School premises are subject to the Kauffman School's inspection at any time a Kauffman School representative has a reasonable suspicion that this policy has been violated and such inspection is reasonably necessary in the investigation of such violation(s). Violation of this policy will result in disciplinary action, up to and including termination.

It is a condition of employment that each employee abides by this policy and notifies the Executive Director of any criminal drug conviction within five (5) days of such a conviction. The Kauffman School has an obligation to notify the appropriate federal agency within ten (10) days of receiving such a notice of conviction. The Executive Director will take appropriate disciplinary action up to and including termination of employment.

Terms of Employment

Employment with the Kauffman School is "at-will." The Kauffman School and its employees mutually retain the right to terminate their employment at any time with or without notice and with or without reason. Unless set forth in writing and signed by the Executive Director, employment at the Kauffman School is for no specific period of time, and any statement inconsistent with this policy is unauthorized.

Employee Termination

Upon termination of employment from the Kauffman School, the employee must return all supplies, keys, technology equipment, phones, student and family information, and other Kauffman School property.

Employee and Member Classification

- Full-time employees are those employed to work regularly at least 40 hours per week. All full-time employees and members are eligible for all benefits as described below. These requirements will be explained to the employee at the time employment at the Kauffman School begins and this information will remain available during employment.
- Part-time employees are those employed who work regularly less than 40 hours per week. Part-time employees and members do not participate in or receive benefits except as described below.
- Temporary employees may work any number of hours up to and including full time. Temporary employees are those employees who are generally hired through a temporary placement agency due to heavy workloads, special projects, or when a regular, full-time employee is on a leave of absence. Temporary employees do not participate in or receive benefits as described below.
- All employees at the Kauffman School are classified as "exempt" employees by the Federal Fair Labor Standards Act and any applicable state laws. This means they are exempt from the overtime provisions of this act.
- Consultants are individuals that work for the Kauffman School for a specified timeframe. Consultants do not participate in or receive benefits as described below.

Salary

An employee's annual salary, plus agreed upon stipends, are paid over twelve equal monthly installments.

Pay Periods

Employee paychecks are distributed monthly on the last day of each month, except when those days fall on a holiday or a weekend, in which case checks are distributed on the prior work day.

We encourage all employees to participate in automatic payroll deposit, but will accommodate those employees who wish to be paid by standard check. An employee's check will not be released to another person without the written authorization of the employee in question. Salary and bonus information should be kept confidential.

At the end of each calendar year, the employee is supplied with his or her Wage and Tax Statement (W-2) form. This statement summarizes the employee's income and deductions for the year.

Garnishments

If the Kauffman School receives an order to garnish an employee's wages, it must comply with that order and reduce take-home pay by the amount ordered. A wage garnishment can be released only at the discretion of the federal, state, or local agency ordering the garnishment.

Office Hours

The Kauffman School office is open from 7:00am – 5:45pm Monday through Friday, excepting scheduled days when the office is closed. Absent special workload reimbursements, employees are expected to work those hours as established at the time of their employment with rest breaks and reasonable lunch period. Work schedules may vary from employee to employee based on position, office policy, and/or special staffing requirements. The Kauffman School mission may require extended working hours for employees.

Punctuality and Attendance

Punctuality and regular attendance are expected of all employees at the Kauffman School. Employees should report to work as scheduled, on time, and prepared to start work. If an employee intends to arrive at the office after the start of his/her scheduled workday, he/she must inform his/her direct supervisor as early as possible prior to the employee's start time. Any employee who must be absent for any reason during work hours must inform the Director of Curriculum and Instruction and the Executive Director. Planned absences can be scheduled two weeks in advance with the Executive Director. If any employee fails to report to work without any notification to the Principal, and the absence continues for a period of three days, the Kauffman School will consider that such employee has abandoned his/her employment and has voluntarily terminated employment with the Kauffman School.

Proper Attire

The Kauffman School expects all staff to dress professionally in "business casual" attire they would feel comfortable wearing in the presence of their board members, school funders, or parent/guardian visitors. The following items are considered inappropriate: jeans, shorts, tank tops, sweat suits, flip-flops, sneakers and overly revealing clothing. In addition, ripped or soiled clothing is also inappropriate. Exceptions to this policy may be made on certain occasions (e.g. field trips, outdoor activity days, etc.) and for staff working in Physical Education.

Personal Information

Personal data for all employees and staff, such as address, telephone numbers, name changes, number of dependents, beneficiaries, and tax withholding information should be

kept up to date. Each employee is requested to report any changes to the Executive Director or Director of Operations as quickly as possible. Unless such disclosure is required by law, the Kauffman School will not release personal data to anyone who is not employed by the Kauffman School or an outside agency unless specifically authorized by the employee.

Personal Leave/Sick Days

Any staff member who is ill and cannot come to work must notify the Executive Director's office either in person or by phone as quickly as possible. The Kauffman School may require medical certification of illness in order to grant sick pay to employees. Paid sick days are limited to five per fiscal year for each staff member and may not be carried over.

To schedule planned personal holidays, employees should request advance approval from the Executive Director's office no fewer than two weeks prior to the date(s) in question. Requests will be reviewed based on business needs, staffing requirements, and scheduled vacation of other employees. Planned absences of more than one week must be approved at least six weeks in advance. Paid personal holidays are limited to two per fiscal year for each staff member and may not be carried over.

Personal Leave of Absence

All eligible employees will be permitted twelve weeks of unpaid Personal Leave of Absence in association with the following:

- the birth of a child;
- the adoption of a child;
- a "serious health condition" (as defined below);
- to care for an immediate family member who has a "serious health condition" (as defined below).

The Kauffman School reserves the right to deny a request for Personal Leave of Absence under certain conditions. A "serious health condition" is generally defined as a circumstance entitling an employee to a Family Medical Leave Act absence due to an illness, injury, impairment, or physical or mental condition that involves either (1) inpatient care or (2) continuing treatment by a health care provider.

Subject to the terms, conditions, and limitations of the applicable plans, the Kauffman School shall continue to provide health insurance coverage for up to six weeks of personal leave. After that time, employees will become responsible for the full costs of these benefits under COBRA, or similar state statutes if the employee wishes to continue coverage. When the employee returns from leave, benefits will again be provided according to all applicable plans.

Medical, Dental, and Other Insurance

The Kauffman School provides all full-time employees with medical, vision, and dental insurance. Eligibility requirements, coverage, enrollment periods, and other benefits information is available through the Executive Director's office. Employees may pay for additional coverage, including long-term disability, life insurance, and retirement savings.

Worker's Compensation

The Kauffman School provides worker's compensation insurance for all employees as required by law. Please contact the Executive Director's office if any information is needed regarding what claims may be covered and the manner in which claims may be made. All employees should report to the Executive Director any injuries suffered as a result of employment activity at the Kauffman School as quickly as possible. Neither the Kauffman School nor its insurer will be liable for the payment of worker's compensation benefits for any injury that arises out of an employee's voluntary participation in any off-duty recreational, social, or athletic activity that is not part of, required by, or an expected part of the employee's work-related duties.

Travel and Business Expense Reimbursement Policy

The purpose of this policy is to document the allowable travel expenses eligible for reimbursement. All expenses detailed in the Kauffman School's Travel Expense Form must be accompanied by a receipt or supporting documentation. Failure to provide such will result in denial of reimbursement. The Kauffman School does not offer a per diem rate.

Airport Parking: Long-term parking should be used for travel exceeding twenty-four hours.

Taxi/Shuttle/Public Transport/Rapid Transit: Employees should evaluate their individual circumstances and select the safest, most economical alternative when traveling to and from all destinations. Taxi, shuttle, and public transport expenses must be accompanied by a receipt and must not be for personal use.

Personal Vehicle: When required to travel by personal vehicle outside the greater Kansas City metro area, mileage will be reimbursed using the standard IRS rate. Staff is not authorized to transport students in personal vehicles at any time. Proof of adequate insurance coverage must be on file with the school in order to process personal vehicle reimbursement requests.

Lodging: In-room movies and use of hotel gym, massage services, and sauna facilities will not be reimbursed. Laundry services and valet parking are generally considered non-reimbursable expenses. Hotel stays in excess of five days may warrant reimbursement for laundry services. Acceptable lodging rates will be provided by the Executive Director based on standard IRS recommendations for various locations.

Meals: For travel to conferences that include meals, employees will be reimbursed for two meals per day on travel days only. For conferences that do not include meals or for all other work-related travel, total daily meal expenses should not exceed \$40 for the employee traveling. All meals expensed must have receipts.

Alcohol: Alcohol purchases will not be reimbursed by the school.

Telephone Usage

School telephones are for school business use. Personal calls (incoming and outgoing) should be limited to essential matters and should be of short duration.

Technology and Equipment Usage

The Kauffman School provides employees with computer equipment and on-line access to internal and external networks, including the Internet, so that employees may communicate more efficiently and accomplish the Kauffman School's goals. Use of computer equipment or on-line access provided by the School is subject to the following general conditions:

- Your use of computer equipment and on-line access should be for the Kauffman School's purposes and not for more than incidental personal use.
- Use of equipment or on-line access provided by the Kauffman School for any illegal purpose is prohibited. Such use includes, but is not limited to:
 - Gaining unauthorized access to or intentionally damaging other computer systems or networks or the information contained within them
 - Committing theft, fraud or other criminal acts of any kind
 - Distributing or obtaining illegally copied software, graphics, sounds, text or other material
 - Sending or posting harassing or threatening messages or pornographic or indecent content
- The Kauffman School will cooperate with law enforcement authorities to prosecute offenders.
- The Kauffman School reserves the right to monitor all on-line communications to ensure that appropriate and lawful purposes are being pursued and to limit connections solely to Kauffman School-related resources. All information stored on Kauffman School computers, including all e-mail communication, belongs to the Kauffman School. The Kauffman School may inspect all such computers and information at any time as necessary for the conduct of its business.
- No direct third party physical or electronic access to Kauffman School facilities, information, or computers of any type or for any reason may be established without the express permission of the Director of Operations or Executive Director.
- On-line communications may be subject to interception by persons outside the Kauffman School and such interception may not be detectable. Therefore, no confidential information should be sent on-line by any means without utilizing appropriate security methods such as the use of code names or (in certain cases) encryption (using software to scramble any messages before they are sent, and descramble them upon receipt). Any encryption software should be provided or approved by the Kauffman School, and the Kauffman School should be given a copy of all encryption and decryption "keys" utilized for the above purpose.
- To protect the School from infringement actions, employees may not download or save any material from any on-line source, however retrieved, unless (a) the employee has taken measures to verify source reliability, and (b) the material is legally permitted to be downloaded without violation of copyright or trademark.
- Downloading data, information, images, and the like from an outside source increases the risks to computers of viruses and other damaging agents. Employees should not retrieve material from outside sources, particularly from sources not known to an employee, unless there is good reason to do so. Any material downloaded from an outside source should be checked immediately for viruses and other damaging elements.

In addition, the following policies apply to the specific services and capabilities described below:

Electronic Mail

- The Kauffman School provides e-mail for purposes of school communications.
- Employees are prohibited from initiating or forwarding harassing, pornographic or indecent messages, either to Kauffman School employees or to anyone else.
- Electronic mail must be addressed to proper recipients.
- When responding to work-related e-mail requests on an informal and unofficial basis (e.g. a personal reference for a colleague or student), the message must clearly state that the employee's views are not necessarily the views of the Kauffman School. This language is available through the Executive Director's office.
- Confidential information about the Kauffman School, its students, vendors, and employees should not be discussed via the internet.
- Employees are prohibited from misrepresenting their names, identities, positions, or from posing as another person in an electronic mail message.

Chat Rooms and Weblogs

- Access to chat rooms and weblogs ("blogs") is subject to similar restrictions as internet access.
- Chat rooms and blogs are prohibited when using Kauffman School computers, unless it is an official school posting as part of an activity approved by the Executive Director.
- If an employee has obtained express authorization to post a message in a chat room or on a blog that is not related to official Kauffman School business, he/she must always state that any opinions expressed are not those of the Kauffman School. This language is available through the Executive Director's office.
- While using a computer outside of the workplace to post messages in a chat room or on a blog, employees should not identify or criticize (either by name or implication) the Kauffman School, its employees, or Board of Trustees. Moreover, employees should not include anything in a posting which gives the impression that the views expressed are in any way associated with the Kauffman School.
- While the Kauffman School provides internet access to its employees as part of its work resources, it does not monitor the content of every website which it makes available. Provision of a particular website or posting board does not imply the Kauffman School's endorsement or approval of the content of such site or posting. The Kauffman School reserves the right but is not obligated to place appropriate limits on the sites it makes available.

Computer Software: The following is the Kauffman School's policy concerning its computers and software. All employees shall use software only in accordance with its license agreement. Unless otherwise provided in the license, any duplication of copyrighted software, except for backup and archival purposes, is a violation of the law. The following points are to be followed to comply with the Kauffman School's software licensing agreement(s):

- Employees will use all software in accordance with applicable license agreement(s).
- Legitimate licensed copies of software will promptly be provided to all employees who, in the discretion of the Kauffman School, need it for the performance of their duties to the Kauffman School.
- No employee will make any unauthorized copies of any software under any circumstances. Anyone found copying software other than for backup purposes is subject to termination.
- The Kauffman School will not tolerate the use of any unauthorized copies of software in our School. Any person illegally reproducing software can be subject to civil and

criminal penalties including fines and imprisonment. The Kauffman School does not condone illegal copying of software under any circumstances and anyone who makes, uses, or otherwise acquires unauthorized software will be appropriately disciplined.

- No employee shall give Kauffman School software to anyone outside approved staff, including students. No employee shall install any software on Kauffman School computers except the software provided by the Kauffman School for installation. No employee shall establish a password or encryption protection on a Kauffman School computer without authorization from the Kauffman School or without providing such password or the key to such encryption to the Kauffman School.
- Any employee who determines that there may be a purposeful or accidental violation of the above software policy within the Kauffman School shall notify the Executive Director.
- All software installed and/or used on Kauffman School computers shall be properly licensed through appropriate procedures.

Disciplinary Action: Abuse of the Kauffman School's computer equipment or on-line connection or other violation of this policy will result in disciplinary action, up to and including termination.

Confidential Information

The protection of the Kauffman School's confidential information is vital to the interests and the success of the Kauffman School. It is the policy of the Kauffman School to ensure that the operations, activities and business affairs of the Kauffman School are kept confidential to the greatest possible extent. If during the course of employment, an employee acquires confidential information or proprietary information about the Kauffman School and its students, such information is to be handled in strict confidence and not to be discussed with persons outside the Kauffman School. Such confidential information includes, but is not limited to, student records, compensation, certain policies and procedures, and building and security-related information. Employees are also responsible for the internal security of such information.

Keeping all of the Kauffman School's proprietary information confidential shall be part of an employee's working arrangement with the Kauffman School. This obligation shall remain in effect during the entire term of employment at the Kauffman School and at all times thereafter. Violation of this policy is a serious breach of confidence and may lead to disciplinary action, up to and including immediate termination.

Keys

For the security of the Kauffman School, all staff are expected to exercise great care in handling school keys. (In this section, keys also refer to the combinations used to open locks.) The following procedures should be followed regarding the use and handling of Kauffman School keys:

- Keys are property of the Kauffman School and must be returned to the Executive Director upon completion of employment. Failure to do so can result in withholding of any unpaid compensation.
- Lost keys must be reported immediately to the Executive Director. Replacement keys can be picked up at the office only after the expense to duplicate the key is made by the person responsible.

- Employees are never to have duplicate keys made or give another individual any duplicate keys.
- Employees should never give their keys to any other person. Temporary keys will be available to employees who arrive at school without their keys and must be returned to the Executive Director's office at the end of the day.

Security

General security is the responsibility of all employees during regular business hours. Staff should make sure all windows are closed and locked when exiting a room. Storage closets should never be left open. All staff are expected to question any unknown person seen walking through the hallways. Staff should never attempt to force any individual to leave a building if he/she is uncooperative. Contact school security personnel or call police (911).

Medicine

It is the policy of the Kauffman School that students not be in possession of any medication, nor take any medications during the regular school day or on school premises in an unsupervised manner. Employees are also not permitted under any circumstances to give a student any medicine (prescription, over the counter, or otherwise). When required, students taking prescription medicines will do so in the main office under the guidance of the contracted School Nurse or the Executive Assistant, and teachers are asked to cooperate in ensuring students are in compliance with their medicines. Students who become ill or injured should be sent to the main office, or staff should call for immediate medical assistance (911) as the situation dictates.

Employee Acknowledgment

I have reviewed my copy of the Kauffman School Personnel Policies. I understand and agree that it is my responsibility to read and familiarize myself with the policies and procedures contained in the document.

I understand that except for employment at-will status, the Kauffman School can change any and all policies or practices at any time. The Kauffman School reserves the right to change my hours, wages, and working conditions at any time. I understand and agree that no member, supervisor, or representative of the Kauffman School has authority to enter into any agreement, express or implied, for employment for any specific period of time, or to make any agreement for employment other than at-will; only the Executive Director has the authority to make any such agreement and then only in writing.

My signature below certifies that I understand the foregoing agreement on at-will status is the sole and entire agreement between the Kauffman School and myself concerning the duration of my employment and the circumstances under which my employment may be terminated. It supersedes all prior agreements, understandings, and representations concerning my employment with the Kauffman School.

Signature Page

Employee's Signature: _____

Employee's Printed Name: _____

Date: ___/___/___

cc: Personnel file

SAMPLE

Appendix B.5-1: Kauffman School Ten-year Enrollment Matrix

Students Served by Grade Level	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
5th Grade	75	75	150	150	150	150	150	150	150	150
6th Grade	0	75	75	150	150	150	150	150	150	150
7th Grade	0	0	75	75	150	150	150	150	150	150
8th Grade	0	0	0	75	75	150	150	150	150	150
9th Grade	0	0	0	0	63	67	135	135	135	135
10th Grade	0	0	0	0	0	56	60	121	121	121
11th Grade	0	0	0	0	0	0	50	54	108	108
12th Grade	0	0	0	0	0	0	0	45	48	97
Total Students	75	150	300	450	588	723	845	955	1,012	1,061

Students Served by School Type	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Middle School	75	150	300	450	525	600	600	600	600	600
High School	0	0	0	0	63	123	245	355	412	461
Total Students	75	150	300	450	588	723	845	955	1,012	1,061

Appendix C.1-1: Kauffman School Budget Template
Five Year Operational Budget

		2011-12	2012-13	2013-14	2014-15	2015-16
		(75 enroll)	(150 enroll)	(300 enroll)	(450 enroll)	(588 enroll)
Revenues						
5100	Local	\$ 1,604,293	\$ 1,174,501	\$ 1,164,987	\$ 922,205	\$ 2,285,356
5200	County	-	-	-	-	-
5300	State	668,658	1,477,874	2,956,311	4,507,597	5,942,851
5400	Federal	264,057	385,616	619,660	709,503	925,509
5899	GRAND TOTAL REVENUES	2,537,008	3,037,991	4,740,958	6,139,305	9,153,715
Expenditures						
1100	Regular Programs	637,412	908,529	1,671,908	2,368,162	3,267,786
1191	Summer School	-	194,966	362,907	492,797	682,341
1200	Special Programs	154,665	179,167	300,298	351,467	542,118
1999	TOTAL INSTRUCTION	792,077	1,282,662	2,335,113	3,212,426	4,492,245
2100	Support Services-Pupils	196,686	206,881	296,050	386,789	556,927
2200	Support Services-Professional Development	1,406	1,922	3,032	3,569	3,958
2320	Executive Administration Services	316,787	365,501	609,482	629,997	846,395
2510	Support Services-Business	227,301	185,776	195,776	221,177	227,071
2540	Operation of Plant Services	619,650	636,965	661,697	673,899	1,787,650
2550	Pupil Transportation	87,870	133,123	268,909	407,396	502,908
2560	Food Services	45,404	103,576	209,224	321,007	419,314
2660	Technology Services	209,060	112,222	111,636	208,357	215,956
2998	TOTAL SUPPORT SERVICES	1,704,164	1,745,965	2,355,805	2,852,191	4,560,179
9999	GRAND TOTAL EXPENDITURES	2,496,241	3,028,627	4,690,918	6,064,617	9,052,424
Total Revenue Over/(Under) Total Expenses		40,768	9,363	50,040	74,688	101,291
Beginning Balance, July 1		152,284	193,052	202,415	252,455	327,144
Ending Balance, June 30		\$ 193,052	\$ 202,415	\$ 252,455	\$ 327,144	\$ 428,435

***Please note: Annual contributions from the Kauffman Foundation are included in item 5100: "Local." This support runs from the start-up year (Year Zero) through the end of Year Seven. Please see Appendix C.1-4 for a ten-year budget forecast reflecting this funding component.**

Appendix C.1-2: Kauffman School Cash Flow Analysis

First Year Operational Budget Cash Flow

		2011-12 (75 enroll)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Revenues														
5100	Local	\$ 1,604,293	\$ 133,333	\$ 133,333	\$ 133,763	\$ 133,763	\$ 133,763	\$ 133,763	\$ 133,763	\$ 133,763	\$ 133,763	\$ 133,763	\$ 133,763	\$ 133,763
5200	County	-	-	-	-	-	-	-	-	-	-	-	-	-
5300	State	668,658	55,721	55,721	55,721	55,721	55,721	55,721	55,721	55,721	55,721	55,721	55,721	55,721
5400	Federal	264,057	-	-	-	-	-	105,623	3,959	3,959	3,959	93,747	3,959	48,853
5899	GRAND TOTAL REVENUES	2,537,008	189,055	189,055	189,484	189,484	189,484	295,107	193,443	193,443	193,443	283,231	193,443	238,337
Expenditures														
1100	Regular Programs	637,412	53,118	53,118	53,118	53,118	53,118	53,118	53,118	53,118	53,118	53,118	53,118	53,118
1191	Summer School	-	-	-	-	-	-	-	-	-	-	-	-	-
1200	Special Programs	154,665	12,889	12,889	12,889	12,889	12,889	12,889	12,889	12,889	12,889	12,889	12,889	12,889
1999	TOTAL INSTRUCTION	792,077	66,006	66,006	66,006	66,006	66,006	66,006	66,006	66,006	66,006	66,006	66,006	66,006
2100	Support Services-Pupils	196,686	16,391	16,391	16,391	16,391	16,391	16,391	16,391	16,391	16,391	16,391	16,391	16,391
2200	Support Services-Professional Development	1,406	117	117	117	117	117	117	117	117	117	117	117	117
2320	Executive Administration Services	316,787	26,399	26,399	26,399	26,399	26,399	26,399	26,399	26,399	26,399	26,399	26,399	26,399
2510	Support Services-Business	227,301	18,942	18,942	18,942	18,942	18,942	18,942	18,942	18,942	18,942	18,942	18,942	18,942
2540	Operation of Plant Services	619,650	51,638	51,638	51,638	51,638	51,638	51,638	51,638	51,638	51,638	51,638	51,638	51,638
2550	Pupil Transportation	87,870	-	-	8,787	8,787	8,787	8,787	8,787	8,787	8,787	8,787	8,787	8,787
2560	Food Services	45,404	-	-	4,540	4,540	4,540	4,540	4,540	4,540	4,540	4,540	4,540	4,540
2660	Technology Services	209,060	17,422	17,422	17,422	17,422	17,422	17,422	17,422	17,422	17,422	17,422	17,422	17,422
2998	TOTAL SUPPORT SERVICES	1,704,164	130,907	130,907	144,235	144,235	144,235	144,235	144,235	144,235	144,235	144,235	144,235	144,235
9999	GRAND TOTAL EXPENDITURES	2,496,241	196,914	196,914	210,241	210,241	210,241	210,241	210,241	210,241	210,241	210,241	210,241	210,241
Total Revenue Over/(Under) Total Expenses		40,768	(7,859)	(7,859)	(20,757)	(20,757)	(20,757)	84,866	(16,798)	(16,798)	(16,798)	72,990	(16,798)	28,096
Beginning Balance, July 1		152,284	152,284	144,425	136,566	115,809	95,052	74,295	159,160	142,362	125,563	108,765	181,755	164,956
Ending Balance, June 30		\$ 193,052	\$ 144,425	\$ 136,566	\$ 115,809	\$ 95,052	\$ 74,295	\$ 159,160	\$ 142,362	\$ 125,563	\$ 108,765	\$ 181,755	\$ 164,956	\$ 193,052

Appendix C.1-3: Kauffman Foundation Letter of Support



Carl J. Schramm, Ph.D.
PRESIDENT AND CEO

March 22, 2010

Michael Middleton
Deputy Chancellor
University of Missouri-Columbia
101 Jesse Hall
Columbia, MO 65211

Dr. Rose Porter
Interim Dean
College of Education
University of Missouri-Columbia
118 Hill Hall
Columbia, MO 65211

Dear Chancellor Middleton and Dean Porter:

On behalf of the Trustees of the Ewing Marion Kauffman Foundation, I proudly support this charter school application for the Ewing Marion Kauffman School. This application represents over a year of close study and analysis of high-performing urban charter schools across the country. We seek to bring the very best of the charter movement to Kansas City in order to provide a high quality choice for students and families and contribute to the improvement of urban education in our region.

The Kauffman School is a direct legacy of Ewing Kauffman. Project Choice supported hundreds of urban Kansas City students to attend college or vocational training. In 2003, the Kauffman Foundation Trustees extended this vision of Ewing Kauffman with Kauffman Scholars, a 19-year program designed to assist 2,300 students to prepare for and succeed in college. The Kauffman School represents the next chapter in Ewing Kauffman's vision of preparing Kansas City's youth for college and life.

The Kauffman Foundation is deeply invested in the school's mission: to prepare students to excel academically, graduate college, and apply their unique talents in the world to create economically independent and personally fulfilling lives. The Trustees of the Foundation have committed up to \$10 million over the first ten years of the school to ensure a solid start for a self-sustaining charter school.

Sincerely,

A handwritten signature in black ink that reads "Carl J. Schramm".

www.kauffman.org

9801 ROCKHILL ROAD KANSAS CITY, MISSOURI 64110-2046 TEL: 816-937-1001 FAX: 816-932-1225 cschramm@kauffman.org

Appendix C.1-4: Kauffman School Ten-Year Budget Forecast

		Ten Year Operational Budget										
		2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22
		(75 enroll)	(150 enroll)	(300 enroll)	(450 enroll)	(588 enroll)	(723 enroll)	(845 enroll)	(955 enroll)	(1,012 enroll)	(1,061 enroll)	(1,061 enroll)
Revenues												
5100	Local	\$ 1,604,293	\$ 1,174,501	\$ 1,164,987	\$ 922,205	\$ 2,285,356	\$ 1,737,821	\$ 1,287,892	\$ 925,327	\$ 1,047,958	\$ 1,116,277	\$ 1,173,331
5200	County	-	-	-	-	-	-	-	-	-	-	-
5300	State	668,658	1,477,874	2,956,311	4,507,597	5,942,851	7,373,175	8,674,549	9,866,253	10,513,788	11,085,165	11,141,744
5400	Federal	264,057	385,616	619,660	709,503	925,509	1,139,151	1,326,864	1,498,398	1,591,746	1,673,874	1,682,224
5899	GRAND TOTAL REVENUES	2,537,008	3,037,991	4,740,958	6,139,305	9,153,715	10,250,146	11,289,305	12,289,977	13,153,493	13,875,316	13,997,299
Expenditures												
1100	Regular Programs	637,412	908,529	1,671,908	2,368,162	3,267,786	3,758,262	4,362,264	4,955,723	5,262,818	5,627,095	5,789,704
1191	Summer School	-	194,966	362,907	492,797	682,341	777,765	880,637	982,937	1,046,508	1,112,883	1,148,410
1200	Special Programs	154,665	179,167	300,298	351,467	542,118	598,216	647,912	695,122	728,004	759,708	777,798
1999	TOTAL INSTRUCTION	792,077	1,282,662	2,335,113	3,212,426	4,492,245	5,134,242	5,890,812	6,633,782	7,037,329	7,499,687	7,715,912
2100	Support Services-Pupils	196,686	206,881	296,050	386,789	556,927	724,249	758,095	786,796	810,063	834,589	853,278
2200	Support Services-Professional Development	1,406	1,922	3,032	3,569	3,958	3,612	4,338	4,647	4,585	4,849	4,894
2320	Executive Administration Services	316,787	365,501	609,482	629,997	846,395	875,872	905,260	935,403	967,424	1,001,510	1,037,866
2510	Support Services-Business	227,301	185,776	195,776	221,177	227,071	230,516	237,992	243,091	247,926	252,676	256,160
2540	Operation of Plant Services	619,650	636,965	661,697	673,899	1,787,650	1,808,993	1,836,581	1,867,973	1,882,379	1,907,858	1,935,671
2550	Pupil Transportation	87,870	133,123	268,909	407,396	502,908	646,466	746,206	847,877	903,931	961,021	970,631
2560	Food Services	45,404	103,576	209,224	321,007	419,314	517,598	601,097	678,400	722,487	762,096	769,717
2660	Technology Services	209,060	112,222	111,636	208,357	215,956	255,328	226,814	245,115	216,931	208,962	270,109
2998	TOTAL SUPPORT SERVICES	1,704,164	1,745,965	2,355,805	2,852,191	4,560,179	5,062,634	5,316,384	5,609,302	5,755,726	5,933,561	6,098,326
9999	GRAND TOTAL EXPENDITURES	2,496,241	3,028,627	4,690,918	6,064,617	9,052,424	10,196,876	11,207,196	12,243,085	12,793,056	13,433,248	13,814,238
Total Revenue Over/(Under) Total Expenses		40,768	9,363	50,040	74,688	101,291	53,270	82,109	46,893	360,438	442,068	183,061
Beginning Balance, July 1		152,284	193,052	202,415	252,455	327,144	428,435	481,705	563,814	610,707	971,144	1,413,213
Ending Balance, June 30		\$ 193,052	\$ 202,415	\$ 252,455	\$ 327,144	\$ 428,435	\$ 481,705	\$ 563,814	\$ 610,707	\$ 971,144	\$ 1,413,213	\$ 1,596,274

Appendix C.6-1: Kauffman School Start-up Year Activity Matrix

August 2010		
Task Area	Task Description	Primary Responsibility
Organizational	State charter school application approved by DESE (end of July / early August)	Kauffman School Design Team (KSDT)
Finance and Operations	Federal CSP submitted	KSDT
Finance and Operations	Acquire forms (purchase orders, checks, etc)	Executive Director (ED)
Governance / Administration	Board transitions administrative work to school leadership team	Board of Directors (BOD) and Executive Director
Governance / Administration	All board meetings are now public under provisions of the Sunshine Law (pending approval of charter school application by DESE)	BOD
Academic Program	School curriculum and academic programming development	Director of Curriculum and Instruction (DCI)
Communications and Outreach	Issue public statement regarding state approval and enrollment window timeline	ED
September 2010		
Task Area	Task Description	Primary Responsibility
Organizational	Develop draft strategic approach for each of the key school goals	ED
Finance and Operations	Develop operations and business policy frameworks	ED
Finance and Operations	Identify and acquire services of contracted accounting firm; purchase accounting software package	ED
Academic Program	Continue refining and aligning curriculum to overall academic program, philosophy, objectives, and state standards	DCI
Communications and Outreach	Work with Kauffman School Design Team to draft roles, responsibilities, marketing priorities, recruitment strategies, etc.	ED / KSDT
Communications and Outreach	Identify community events at which to promote the school over the next several months and begin making arrangements to be present	ED
Facilities	Target location identified for school, facilities negotiations begin; Location based on target population and assessments conducted over previous 12 months.	BOD / ED

October 2010		
Task Area	Task Description	Primary Responsibility
Organizational	Develop of personnel and school policies completed	ED
Finance and Operations	Refine monthly cash flow projections through FY12	ED
Governance / Administration	Position descriptions and duties defined for all board member roles	BOD
Academic Program	Continue refining and aligning curriculum to overall academic program, philosophy, objectives, and state standards	DCI
Communications and Outreach	Enrollment application, marketing materials completed and approved	ED
Communications and Outreach	More intensive community outreach and recruitment plan implemented	ED
Communications and Outreach	Parent and community engagement strategy completed (should be aligned to school policies as well)	ED
Facilities	Negotiations commencing for target facility	BOD / ED
Other	Evaluate current charter statute and check in with MCPSA regarding pending legislative agenda for 2011 session	ED
November 2010		
Task Area	Task Description	Primary Responsibility
Organizational	Begin implementation of staff recruiting plan (plan for January / February launch)	ED / DCI
Finance and Operations	Form 990 for non-profit organizations completed and submitted to IRS (if applicable)	ED
Finance and Operations	Identification of all necessary contracted financial resources complete	ED
Governance / Administration	Final professional development plan completed	ED / DCI
Academic Program	Continue refining and aligning curriculum to overall academic program, philosophy, objectives, and state standards	DCI
Communications and Outreach	Sign up for MCPSA charter school information fair	ED
Facilities	Facilities negotiations completed	BOD / ED
Other	Host panel of recent charter school openings (KC and STL) asking for key information and advice ("what I wish I knew")	ED / BOD

December 2010		
Task Area	Task Description	Primary Responsibility
Organizational	Develop job descriptions for key admin staff and general qualifications required for instructional staff (certification, experience, etc)	ED / DCI
Organizational	Personnel and student policies completed and legally vetted	ED / DCI
Finance and Operations	Establish staff salary range and benefits	ED
Governance and Admin	Establish separation of duties (start-up staff, board, school leader, general staff)	BOD / ED
Governance and Admin	Establish ongoing meeting schedule for coming calendar year	BOD
Communications and Outreach	Website version 1.0 completed; school listed in MCPSA Charter Information Guide	ED
Facilities	Renovation / Rehabilitation Plan completed	BOD / KSDT
Special Education	Begin search for SPED Director (build talent pool)	ED / DCI
January 2011		
Task Area	Task Description	Primary Responsibility
Organizational	Clear outline of strategic approach in pursuit of key goals completed	ED
Organizational	Clear description of school culture and mechanisms for promoting that culture completed.	ED
Organizational	Build staff recruitment pool by contacting organizations or participating in state/local events (TFA, MCPSA job fair, etc)	ED / DCI
Organizational	Establish "waiting list" protocols for families already interested in the school.	ED
Organizational	Design teacher evaluation system	DCI
Academic Program	Engage with primary assessment provider to plan for school year annual growth testing	DCI
Communications and Outreach	Hold first Parent Information Fair to inform families of the option and build waiting list pending approval (explain lottery enrollment process)	ED
Facilities	Facilities plan completed for target space, timeline for renovation and occupation confirmed	BOD / ED
Other	Identify DESE or other trainings slated for 2011 that would benefit	ED / DCI

	board, staff, or consultants and create a calendar reflecting those opportunities	
Other	Begin monitoring legislative session for changes in charter law that may impact school	ED
February 2011		
Task Area	Task Description	Primary Responsibility
Organizational	Begin interviewing and hiring staff for following school year (start dates in July 2011)	ED / DCI
Organizational	Enrollment Window opens (approx. 15-30 days)	ED
Communications and Outreach	Full recruiting plan in place for 30 day application window (street-level marketing, press releases, ads, etc); Second Parent Information Fair conducted	ED
Special Education	Begin hiring process for SPED Director	ED
Other	Complete unfinished tasks from previous months	ED / DCI / BOD / KSDT
March 2011		
Task Area	Task Description	Primary Responsibility
Organizational	Continue staff hiring for upcoming school year	ED / DCI
Academic Program	Curriculum plan completed with alignment to GLEs, primary assessment tool, and other organizational components.	DCI
Academic Program	Purchase curriculum materials	DCI
Academic Program	Identify and plan for any specific curricular development needs among staff	DCI
Communications and Outreach	Public information releases / press releases regarding lottery enrollment process, waiting list, etc	ED
Communications and Outreach	Third Parent Information Fair conducted for both incoming students and waiting list families.	ED
Facilities	Building is prepared and available for facility tour by incoming students/families	BOD / ED
Special Education	SPED Director hired (willing to assist as much as possible until start date, assuming June 1)	ED
April 2011		
Task Area	Task Description	Primary Responsibility
Organizational	Culture and school policy handbooks for incoming staff and other stakeholders; purchase SIS	ED
Finance and Operations	Issue comprehensive report on financial situation to BOD and development stakeholders	ED

	(including cash flow, CSP budget, and Year One budget)	
Governance and Administration	Use strategic plan to develop a school improvement component for first 3 years (based on sponsor accountability, DESE, etc)	ED / BOD / DCI
Governance and Administration	Identify areas where contracted services will be necessary and arrange for services	ED
Academic Program	Purchase supplemental and support items	DCI
Communications and Outreach	Stay in contact with enrolled students and waiting list families via simple newsletter, email blasts, and school-related gatherings.	ED
Communications and Outreach	Fourth Parent Information Fair conducted	ED
Communications and Outreach	Complete parent and community engagement plan for upcoming school year finished	ED
Accountability	Clear oversight and accountability plan developed and ready for implementation (w/ sponsor)	ED / BOD
Accountability	Develop curriculum based measures to track progress toward academic goals (part of school improvement plan)	DCI / ED / BOD
Accountability	Meet with sponsor to provide comprehensive update and share tracking, assessment, and culture materials	ED / BOD
Special Education	Check in with local SPED expert to ensure program is ready to launch, fully compliant, and genuinely beneficial to special needs students	ED / DCI
May 2011		
Task Area	Task Description	Primary Responsibility
Organizational	Staff hiring complete. Arrange meet-and-greet with school leader, board, other staff, etc if possible. Also a good time to collect any missing paperwork.	ED / DCI
Organizational	Finalize bus and food service contracts for upcoming school year	ED
Finance and Operations	Arrange for audit of start-up year and plan for audit of first operational fiscal year	ED
Governance and Administration	Review division of roles and responsibilities between board and administration/staff	BOD / ED

Governance and Administration	Review progress to date and revise schedule of activity for remaining months accordingly.	BOD / ED
Governance and Administration	Contracted services acquired for back-office functions -- HR process, payroll, benefits, school insurance, etc are ready to be accessed.	ED
Academic Program	Assessment materials and services are purchased and/or ordered (NWEA, etc)	DCI
Communications and Outreach	Stay in contact with enrolled students and waiting list families via simple newsletter or email blasts.	ED / DCI
Communications and Outreach	Fifth Parent Information Fair conducted (perhaps a larger meet-and-greet hosted by Kauffman for all families, students, staff, leaders, board, and even wait list families)	ED / DCI
Facilities	Make necessary repairs/installations, including Technology Infrastructure	ED
Facilities	Arrange for custodian/maintenance services	ED
Special Education	Ensure materials are available for enrolled or enrolling families outlining what the school will do to ensure all children have an opportunity to learn	ED / DCI
Other	Check in with DESE charter contact to ensure no large gaps are present in planning or implementation to this point	ED
June 2011		
Task Area	Task Description	Primary Responsibility
Organizational	Staff development program designed, approved, and communicated to teachers/staff	ED / DCI
Organizational	Conduct criminal background/reference checks	ED
Organizational	Necessary applications and approval for variances, community expert status, provisional certifications, ABCTE, etc	ED / DCI
Finance and Operations	All budget projections and revenue streams (including line-of-credit) are finalized	ED / BOD
Academic Program	Introduction and orientation guide completed for incoming staff regarding philosophy, measures, and specific elements of academic program.	DCI / ED

Communications and Outreach	Communications to all key stakeholder groups continues on at least a monthly basis	ED
Special Education	SPED Director begins full-time work to coordinate tasks accomplished to date and prepare for start of school in August	ED
July 2011		
Task Area	Task Description	Primary Responsibility
Organizational	Conduct first staff orientation	ED / DCI
Organizational	Create and secure personnel files	ED
Organizational	Train staff in implementation of discipline policy and codes of conduct (part of general orientation, but requires more legal expertise)	ED / DCI
Finance and Operations	Implement FY12 Budget	ED
Finance and Operations	Conduct audit of FY11 fiscal year (or ensure it is scheduled by end of August 2011)	ED
Finance and Operations	Ensure reporting system is in place and school is ready to report data to DESE for the new school year.	ED
Academic Program	School leadership and staff create a detailed curriculum plan for at least the first six weeks of school (daily plans, materials, etc)	DCI / ED
Communications and Outreach	Press releases focused on public nature of school, mechanisms for assisting all learners, and student/family visions should begin at this time.	ED
Communications and Outreach	Website version 2.0 is released	ED
Facilities	Staff and volunteers coordinated to work in building as necessary to prepare for opening of school	ED
Accountability	Assessments (both standardized and curriculum-based) are aligned with day-to-day instruction	ED
Special Education	All staff and board members are updated on SPED enrollment procedures, services, and legal requirements	DCI / SPED