

Charter School Proposal for:

The Green School

Bloomington, Indiana

Submitted to

**Indiana Charter
School Board**

Spring 2014

PROPOSAL OVERVIEW AND ENROLLMENT PROJECTIONS

Please provide information for the applicant group's **designated representative**. This individual will serve as the contact for all communications, interviews, and notices from the ICSB regarding the submitted application.

IMPORTANT NOTE: *The full application, including this form, will be posted on the ICSB website. Applicants are advised that local community members, including members of the media, may contact the designated representative for questions about the proposed school(s).*

Name of proposed charter school:

The Green School

Proposed charter school location:

* Please indicate the city/town and, if known, potential address or neighborhood of location. Virtual operators should indicate the relevant geographies the operator intends to serve.

The Woolery Stone Mill
2200 West Sunstone Dr.
Bloomington, IN 47403

School district(s) of proposed location:

Monroe County Community Schools

Legal name of group applying for charter:

The Green School

Names, roles, and current employment for all persons on applicant team, including each board member:

Mary Goral – Educational Consultant

Daniel Baron –
Executive Director, School Project Foundation

Bill Goral – Retired Educator

Michelle Henderson - Adjunct Professor

Andrea Golden – Home School Educator

Brandi Smith – Adjunct Professor

Designated applicant representative:

Mary Goral

Address:

2517 Country Club Rd.

Nashville, IN 47448

Office and cell phone numbers:

502-553-0614

Email address:

drmarygoral@gmail.com

Planned opening year for the school: 2015

Model or focus of proposed school:
(e.g., arts, college prep, dual-language, etc.) Arts-infused

Proposed Grade Levels and Student Enrollment

Indicate the grade levels the school intends to serve. Specify both the planned and maximum number of enrolled students by grade level for each year.

Academic Year	Grade Levels	Student Enrollment (Planned/Maximum)
Year 1	K-5	165/165
Year 2	K-6	192/192
Year 3	K-7	210/210
Year 4	K-8	240/240
Year 5	K-8	240/240
At Capacity	K-8	240/240

Will an application for the same charter school be submitted to another authorizer in the near future?

Yes No

If yes, identify the authorizer(s): _____

Planned submission date(s): _____

Please list the number of previous submissions for request to authorize this charter school over the past five years, as required under IC § 20-24-3-4. Include the following information:

Authorizer(s): Ball State University

Submission date(s): August 2012

PROPOSAL NARRATIVE

EXECUTIVE SUMMARY

Mission

The mission of The Green School will be to cultivate respect and honor for self, one another, and the natural world as we work collaboratively to maximize the potential of the whole child. Students attending our school will be taught academic subjects through the arts and real world application and will learn practical skills through authentic experiences. Students will graduate from our school empowered with the will, skill, capacity, and knowledge to bring about positive change for themselves, others, and their community.

Vision

At The Green School, students, teachers and parents will foster respect, dignity and love for people and the natural world. At our school, all relationships will be grounded in respect and reciprocity. Our students will be infused with a sense of social justice and environmental sustainability. Everyone at our school will be loved and honored and will share their gifts, talents and interests with the larger community. Everyone at our school will experience freedom and security to safely explore and question. Imbued in our school's culture will be a desire to ignite and stoke our students', teachers', and parent's passion for learning.

Educational Need and Target Population

We anticipate a student population made up of children whose parents seek an alternative form of education. Many of today's children do not fit in a traditional public school setting. Further, some have diverse needs that may or may not be met through special education programs. Twenty-first century children require a different type of schooling – one that honors the whole child and employs a diverse set of educational methods. We anticipate our school will attract and serve a wide array of students, some with identified special education needs and others who simply need or seek an alternative. We intend to enroll a diverse population of students, including students from disadvantaged families and from families with diverse backgrounds. We strongly believe that all students deserve a choice that will best meet their needs. Our curriculum reflects a multicultural program, naturally woven into the arts and academics. We also seek students who feel disconnected from learning in traditional public school settings. Teaching to the whole child meets the needs of children who feel alienated from standardized curriculum.

Community Engagement

We have established relationships with diverse community organizations. We will continue to focus on partners who allow our students to provide services to the community, engage our children in Education for Sustainability (EfS) learning opportunities, and provide our school with a practical need or support. The following table provides a summary of our currently established partnerships:

Community Partner	Nature of Partnership
Charter School Management Corporation (CSMC)	Provide back-office and financial services. Represented by Tim McConnell.
School Project Foundation	Non-profit organization guiding us through the charter process.
Kentahten Teacher Training	Training center for our teachers.

Bloomingfoods Cooperative Market and Deli	Community partner committed to food service contract.
Center for Sustainable Living	Advisory: EfS curriculum design and support, EfS related event planning.
Indiana University Service Learning Program	Community partner providing college level service learners to fulfill school staff, marketing, and volunteer needs.
Mother Hubbard's Cupboard Food Pantry	Committed to providing volunteer opportunities for student service learning.
The Boys & Girls Club	Committed to providing volunteer opportunities for student service learning.
Indiana University School of Education	Advisory for special education and ELL; Represented by Board Member, Dr. Theresa Ochoa.

Education Plan/School Design

The Green School will use an arts-infused educational model, deeply integrated with education for environmental sustainability and social justice. We will draw our school's curriculum and methodology from a number of current well-established, research-based programs, including:

- Integrated Curriculum
- Education for Sustainability/Place-based Education
- Arts-infused Curriculum and Pedagogy/Waldorf Education
- Looping
- Social Emotional Learning
- *Readers/Writers Workshop*

Integrated Curriculum. We will employ a theme-based instruction through a morning lesson block. This morning lesson is taught for approximately two hours and focuses on reading and composition, mathematics, science, history, or geography. If, for example, a fourth-grade class is studying fractions, they will spend two hours each day for three to four weeks on this topic. During the two-hour lesson, nearly all other areas of the curriculum will be woven into the topic, including music, movement, art, storytelling, drama, reading, science, and writing. We are passionate about teaching children a curriculum in which all subjects connect and interweave, where nothing is isolated, and where every part is a part of the whole. According to Zemelman, Daniels, and Hyde (1998), the main benefit of teaching using an integrated curriculum is that it "provides children with the continuity, order, and challenge they need, both to enjoy school and to stay engaged with the work" (p. 141).

Education for Sustainability (EfS)/ Place-based Education. Education for Sustainability is an effort to bring the concepts of ecological sustainability and social justice to education. As Mathew Fox (2005) states, a world without social justice is not sustainable and a world that is not sustainable is not socially just. We will maintain quality EfS curriculum and instruction with the support of academic standards developed by the US Partnership for Education for Sustainable Development, along with the curriculum materials and professional development from Shelburne Farms (Educating for Environmental Sustainability), The Cloud Institute for Sustainability

Education, and our local Center for Sustainable Living. The principles of Place-based Education, an philosophy first developed by the Orion Society and Antioch University professor David Sobel, are integral to our EfS curriculum. Place-based Education uses students' local community and environment as the primary resource from which students learn.

Arts-infused Curriculum and Pedagogy/Waldorf Education. We will offer a curriculum designed to nurture the multiple ways that children learn, and one that engages the imagination and capacities of the whole child. This will be done through an arts-infused approach, informed by methods used in Waldorf Education. Eisner (1994, p. 83) states that schools using an approach inspired by Waldorf education "pay... serious attention to the use of multiple aptitudes and the development of diverse forms of knowing." In most lessons, children sing, recite poetry, move rhythmically, draw, write, read, and listen. Eric Jensen (2001), who has written extensively about integrating the arts into academics, states, "The arts enhance the process of learning. The systems they nourish, which include our integrated sensory, attentional, cognitive, emotional, and motor capacities, are, in fact, the driving forces behind all other learning" (p. 2). Following the morning lesson (see above), students work on their skills in mathematics and language arts and participate in special classes such as handwork, gardening, singing, foreign language, instrumental music, painting, and physical education. Through working with their hands and moving with their bodies, children are given a balance between the academic and the more visual/kinesthetic way of learning (Koetzsch, 1989; Ogletree, 1974). Ida Oberman conducted a study comparing standardized test scores between Charter Schools that use methods and curriculum inspired by Waldorf education and schools of similar demographics in California. This study showed that second grade charter school students perform slightly below their peers, while fourth grade students are about equal in performance. However, by eighth grade, the charter school students matched the top ten percent of their peers, region and county wide, while they well outperformed the average scores statewide on the CST. This pattern held true for Language Arts and Mathematics scores (Oberman, 2008). Furthermore, the artistic methods we intend to use have great impact on students with special needs. For the past three years, one of our founding members has used arts-infused methods into lessons taught at a private school for exceptional learners. She used storytelling to teach academic subjects and used the arts to further enhance the content. Preliminary data shows that students are more engaged in the learning process, are better able to remember details, and have improved their writing skills.

Looping. Looping, a simple concept that has received favorable attention, occurs when a teacher stays with one class for at least two consecutive years. According to Grant, Johnson, and Richardson (1996), "...the most important variable in a positive elementary school program is the constant attention of a single teacher/caregiver with whom a child can develop a predictable and meaningful relationship" (p. 15). Looping saves an average of six weeks instructional time at the beginning of each year. Classroom community is developed as students form strong bonds with their peers and teacher. Relationships deepen as the teacher remains with the same class each year, allowing teachers to grow with, and more deeply understand, their students. Looping also allows for greater partnerships with parents, instilling a sense of community between the parents and teacher.

Social Emotional Learning (SEL) programming will enhance academic performance and create a more positive environment for learning. SEL will be taught in the classroom and also reinforced daily through the values underlying the school culture. The five competencies SEL sets out to develop in students are: self-awareness, self-management, social awareness, relationship skills, and responsible decision making. In a study of 270,034 K-12 students, Durlak et.al. (2011) found that students who took part in Social Emotional Learning programs demonstrated significantly improved social and emotional skills, attitudes, behavior, and academic performance as reflected by

an 11-percentile-point gain in achievement. We believe SEL will create a sense of safety, trust, and confidence in all students and empower each student with the capacity and knowledge to bring about positive change for themselves and others.

Readers/Writers Workshop. *Readers/Writers Workshop* is highly structured, predictable, purposeful, and well-planned. The *Writers Workshop* approach is the result of more than 30 years of work by the leaders of the Teachers College Reading and Writing Project and thousands of affiliated schools across the country. Kelley (2002) conducted a large-scale study that compared the writing process approach to the lecture, teacher-only approach. The study revealed that the quality of writing from students who participated in *Writers Workshop* was 22 times greater in a pretest/post-test assessment. Other studies have found the *Readers Workshop* approach to be similarly effective. Debbie Miller (2002) describes strategies that proficient readers use to make meaning out of a text and these strategies are ones taught during the *Readers Workshop* class time.

Non-negotiable Issues

- After three years in operation, 80% of our students will be at or above grade level in mathematics and language arts.
- The school will be committed to the development of the whole child – academic, social, and emotional.
- Education for Sustainability (EfS) will be taught four days a week at every grade in a developmentally-appropriate manner.
- The arts will be fully integrated into all academic subjects.
- Practical arts, including handwork, gardening, and woodworking will be part of the curriculum.
- Movement will be a part of every morning lesson.
- Outdoor education is integral to the curriculum at every grade level.
- All families will always be welcome.
- Whole foods will be served in the cafeteria.
- A fully functional garden will be a source of food for the students and staff.
- High quality, naturally made art supplies, such as beeswax crayons, natural paints, and woolen yarns for handwork, will be available for all students.

Vision for Growth

We would like to open with 165 students, grades K-5. Given the interest from families with young children, we believe we can attract a large number of students in the primary grades. There is also a need for alternatives to the current middle school model. We will grow our middle school by adding one grade level each year for years two, three, and four. By year four, we will have all eight grades, including kindergarten. Our vision for growth is to be fully enrolled by year four, with 240 children. We strongly believe that we will be able to attract the number of students listed above. This year, the existing local charter school turned away well over 200 unsolicited student applicants who sought enrollment – it is our intention to fill this void. There is a demonstrated desire and need for a school that will offer a unique learning environment in Monroe County, one that is committed to place-based environmental education, the creative and practical arts, and social justice.

Governance and Leadership

The **Governing Board** will ensure the school's mission and vision are guiding the actions of school administrators, staff, and advisory bodies, but will delegate day-to-day operations to the two primary leaders of the school, the Education Director and Co-Director. Skills represented by Board members include: legal, accounting, real estate, non-profit experience, public relations, higher education, elementary education and social service programming experience.

The **Education Director**, who will function as the Board’s chief operating officer, will supervise the teachers and staff and guide the delivery of the educational program. She will follow through on Board policy directives and budgetary decisions regarding the operations of the school and will make recommendations to the Board regarding personnel and policy issues.

The **Co-Director** will work closely with CSMC and be responsible for federal, state, and local reporting and compliance. He will be the financial, accounting, and procurement officer for the proposed school, responsible for maintaining accurate and complete records, conforming to appropriate laws and regulations, and assuring proper internal controls. When the Education Director is off-site, the Co-Director will be the responsible party within the school. In addition, the Co-Director will be responsible for ensuring that all students meet or exceed the expected school-wide learning results. He will direct statewide student assessment, provide student achievement data and analysis, and report student data to the proper agencies.

The **Community Engagement Coordinator (CEC)** and the **Life Skills Educator (LSE)** will report to the Education Director and Co-Director. The CEC will organize and direct the EfS program. With the LSE she will foster parent and community relationships. The LSE will provide support to students and develop programs for parents.

SECTION I: EVIDENCE OF CAPACITY
Founding Group

1. Key members of Founding Group, including Board Members

Position	Name
Education Director	Mary Barr Goral, Ph.D. (Founder)
Community Engagement Coordinator, Governance	Brandi Smith, MS (Founder and Board Member)
Life Skills Educator	Michelle Henderson, Ph.D. (Founder)
Handwork Teacher, Curriculum and Instruction	Andrea Golden (Founder)
Gardening Teacher, Curriculum and Instruction	William Goral (Founder)
School Project Foundation Partner	Daniel Baron (Founder)
Governance, Board President	Matthew Barr (Board Member)
Governance	Mike Beam, MS (Board Member)
Governance	Michelle Brentano (Board Member)
Governance, Financial Management Oversight	Karen Connor (Board Member)
Governance, Facilities	Don Griffin (Board Member)
Governance, University Partner	Theresa Ochoa, Ph.D. (Board Member)
Governance	Deborah Wilkin (Board Member)

School leadership, administration, and governance. Our team brings a depth and breadth of practical, as well as theoretical, experience in this area. **Mary Barr Goral** (Education Director) has been involved in elementary, middle and higher education for 27 years. During her 11 years as an elementary teacher she led numerous professional development workshops for local and regional teachers. Dr. Goral directed the Early Childhood and Elementary Education program at Mount Mary College and co-created and directed Great Lakes Waldorf Teacher Training in Milwaukee. As an Associate Professor of Education at Bellarmine University, where she chaired numerous committees, took part in rewriting the Faculty Handbook, created a Masters program with an emphasis in Waldorf Education and created and directed Kenthaten Teaching Training. She oversees the Waldorf Inspired Project, a grant funded program that supports public school teachers in the Louisville area who use the Waldorf approach in their classrooms. Dr. Goral served on the

Board of Trustees of Rudolf Steiner College for three years, and is currently working as an education consultant for Waldorf Methods Public Charter Schools.

Daniel Baron (School Project Foundation Partner) has spent more than 39 years working in public, private and Native American education, and pre-K through college, as a teacher, coach, and whole school change facilitator and curriculum developer. He is a founder of the Harmony Education Center and The Project School in Bloomington, Indiana. For the last 15 years, his work has focused on providing exemplary professional development to school districts and equity-based projects across the country, including partnerships with Indiana University, the University of Indianapolis, the Small Schools Coaching Collaborative, the Coalition of Essential Schools, the Rural Schools and Community Trust, and ATLAS Learning Communities. Daniel served as the Co-Director of the National School Reform Faculty for 6 years and wrote a monthly column, “The Instructional Leader” for National Association of Secondary School Principals’ journal, *Principal Leadership*.

Daniel is the Executive Director of The School Project Foundation, which is currently engaged in a collaborative effort funded by the Nellie Mae Foundation, the Bay and Paul Foundations, and the Vermont Agency of Education. This project is focused on achieving a greater understanding of, and receptivity to, currently emerging, powerful school change efforts, and thereby frame innovative ways to approach subsequent redesign issues.

Matthew Barr (Board President) has a degree in law from Indiana University’s Mauer School of Law. Matt brings a wide array of legal expertise to our governing board.

Mike Beam (Board Member) is Director & Senior Assistant Vice-Provost for Undergraduate Education at Indiana University, Bloomington. Prior to this he served as assistant principal at Brown County High School. Currently he oversees many of IU’s pre-college and dual-credit programs. In addition to The Green School’s Board, Mike is Vice-President of the Board of Directors for Stepping Stones, a non-profit organization serving homeless youth.

Curriculum, instruction, and assessment. Our team has a combined 100+ years of experience in developing curriculum, instructing students, and developing and administering assessments for elementary school, middle school, and college students. **Dr. Goral** has a Ph.D. in Curriculum Studies. In 2009, she published her book *Transformational Teaching: Waldorf-inspired Methods in the Public School* as a pioneering guide for the development of Waldorf-methods charter schools. In her consulting work, she created the K-8 curriculum for Tomorrow River School in Amherst, WI and acts as a mentor and model for the teacher training at Syringa Mountain School in Hailey, ID. **Dr. Theresa Ochoa** is an Associate Professor of Emotional and Behavioral Disorders at Indiana University. She served as resource specialist in a K-8th grade school where her work included helping parents, general education teachers of students with mild disabilities design and implement academic and behavioral interventions. Her research agenda includes the systematic evaluation of the effectiveness of problem-based learning CD-ROM technology in the preparation of teachers for students from Hispanic backgrounds, those with limited English proficiency, and those with behavior problems. Dr. Ochoa is currently serving on the school’s Board of Directors. **Dr. Michelle Henderson** has a Ph.D. in Education and an MS in Social Psychology from Indiana University. She has worked extensively with teachers and students as an instructor and student teacher supervisor, and spent three years as a Family Literacy Coordinator at Clear Creek Elementary School in Bloomington, Indiana. She has also consulted with schools and the Indiana Department of Education to design bullying prevention materials for students, teachers, and administrators. Michelle has also worked with elementary and middle school students as an instructor and facilitator for creating writing projects through an organization called Writing Unlimited, a non-profit organization providing writing classes, workshops, and camps for local students.

Financial, business, and school organizations management. Charter School Management Corporation (CSMC) will provide total back office support. **Karen Conner** (Board Member) has worked as a Certified Public Accountant in Bloomington, Indiana for the past 13 years. Her current position is Chief Financial Officer of Go Express Travel, a local and regional shuttle and charter transportation company. In addition to her accounting practice, Karen has over 12 years of experience teaching financial and managerial accounting to both traditional and non-traditional students at the graduate and under-graduate level. Karen received her Master of Professional Accountancy degree from the Kelley School of Business, Bloomington, Indiana where she was inducted into the business honorary fraternity, Beta Gamma Sigma. She is very active in the accounting profession, serving on the Leadership Cabinet and Ethics Committee of the Indiana CPA Society and on various national task force committees of the American Institute of CPAs.

Performance management. The Charter School Management Corporation (CSMC) will be involved in managing performance of students through PowerSchool (see **Appendix A** for a description of both CSMC services and PowerSchool). In addition, **Daniel Baron** is a leading national expert in training and facilitating professional learning communities (Critical Friends Groups, <http://www.nsrffharmony.org/faq.html>). We anticipate our Co-Director (to be determined) will bring strength in these areas as well.

Parent and Community Involvement. Dr. Michelle Henderson (Life Skills Educator) and **Brandi Smith** (Community Engagement Coordinator) will collaborate, bringing skill in counseling, communication, program design, and a thorough knowledge of the Bloomington community. Dr. Henderson has three years experience as a family literacy coordinator at Clear Creek Elementary School in Bloomington, IN, where she worked with students and their families academically and through community service projects. Brandi Smith received a Masters in Science from Indiana University in Human Development and Family Studies, with a focus on the promotion of sustainable and holistic lifestyles in the community.

Facilities management: Daniel Baron (founding member and School Project Foundation consultant) has over 25 years of facilities management experience. We will hire a Facilities Manager who will be responsible for the maintenance and upkeep of the building. In addition, **Don Griffin** (Board member) has been a real estate agent in Bloomington for the past 20 years.

Please see **Attachment 1** for full resumes of the named individuals.

2. Partners in planning and establishing the school

TGS is committed to strong community ties and additional partnerships as outlined in the Parents and Community section of this application, but four established partnerships are of particular importance to the planning and establishment of The Green School:

CSMC. Represented by Tim McConnell, CSMC has provided assistance with developing a budget for planning and proposal writing. Tim will continue to represent CSMC through the implementation, opening, and running of TGS. CSMC will provide us with consulting on budgeting, data systems, fiscal operations, and financial management.

The School Project Foundation, a local non-profit organization, has played a vital role in consulting with TGS founders about the chartering process. The foundation will provide mentoring during the establishment and implementation of TGS, which will include help with governance, budgeting, and professional development. These services have been offered in-kind.

Kentahten Teacher Training will provide professional development for teachers new to TGS's chosen curriculum and instruction. This includes arts-infused learning inspired by Waldorf Education and instruction in integrated curriculum and social and emotional learning. Training will take place two weeks each summer and two long weekends each school year for 4 consecutive years.

Bloomingfoods Cooperative Market and Deli will provide our school breakfast and lunch. Bloomingfoods is a well-established organization in the Bloomington community, boasting four groceries, four delis, and a commissary kitchen. Bloomingfoods shares our commitment to education and community service centered on equality and sustainability. Bloomingfoods has experience contracting as a food service provider for The Bloomington Project School. The ideal situation will be for Bloomingfoods to staff an onsite kitchen at TGS. A backup plan is for Bloomingfoods to act in a catering capacity. After our gardens are established, we will incorporate the Edible Schoolyard concept (Waters, 2008), and/or Farm to School concept, into the lunch program, extending the learning environment further with education about local food systems, kitchen skills, and food preparation. Bloomingfoods has expressed an interest in co-designing and implementing these programs. In addition, Bloomingfoods has expressed an interest in potential family education projects. A contract between Bloomingfoods and TGS will be necessary, and the details will be worked out during the implementation phase.

3. Motivations that brought the Founding Group together.

A group of dedicated, progressive educators came together with the dream to create a school that meets the needs of the whole child; head, hands and heart. We are passionate about social justice and environmental sustainability and believe in immersing children in an educational community where respect, dignity, and love for people and the natural world are part of their everyday experience. We feel strongly about using both fine and practical arts as the vehicle to teach the academic subjects.

School Leader and Leadership Team

1. Principal/Head of School candidate.

Mary Barr Goral, Ph.D., Education Director/Head of School, has the qualifications to lead a high quality school in achieving its mission. Dr. Goral taught in public schools and in an independent Waldorf school. Her doctoral degree in curriculum studies and nearly 20 years of work with methods inspired by Waldorf education in the public schools will provide the expertise in guiding her staff to deliver a strong curriculum while meeting state and common core standards. Dr. Goral has taught and supervised both pre-service and in-service teachers.. Additionally, Dr. Goral co-designed, directed, and taught at Great Lakes Waldorf Teacher Training in Milwaukee, WI; created, directed, and taught in the masters program with an emphasis in Waldorf education at Bellarmine University; created and teaches at Kentahten Teacher Training; and directs the Waldorf-inspired Project. Her experience in leading these programs/projects makes her the ideal candidate to lead our school. The following summarizes Dr. Goral's leadership experience:

- Building representative for Monroe County Community Schools (MCCSC's) teachers' union
- Treasurer of MCCSC's teachers' union
- Director of Indiana University's Gifted and Talented Summer Camp
- Faculty secretary for Mount Mary College
- Director of Early Childhood/Elementary Program, Mount Mary College
- Co-creator and Director of Great Lakes Waldorf Teacher Training in Milwaukee, WI
- Creator and Director of Kentahten Teacher Training in Louisville, KY
- Faculty Council representative for Bellarmine University, Louisville, KY

- Creator and Director of the Masters with an emphasis in Waldorf education, Bellarmine University, Louisville, KY
- Director of the Waldorf-inspired Cadre since 2004 (a group of public school teachers in Louisville, KY who use methods inspired by Waldorf in their classroom)
- Board of Trustees member at Rudolf Steiner College
- Founding member of TGS
- Educational consultant at Meredith Dunn School, a private school for children with special needs located in Louisville, KY
- Educational consultant for Blue Oak Charter School, a charter school inspired by Waldorf education in Chico, CA
- Educational consultant for Syringa Mountain School, a charter school inspired by Waldorf education in Hailey, Idaho
- Educational consultant for Tomorrow River Community Charter School, a charter school inspired by Waldorf education in Amherst, WI

Please see **Attachment 2** For Dr. Goral's qualifications and resume.

2. Who will work immediately after approval to lead development of the school?

Mary Goral will work full-time or nearly full-time to lead in the development of the school following the application approval. Brandi Smith, Michelle Henderson, and Andrea Golden (founding members) will work on an hourly basis. We will compensate these individuals through start up grants.

3. Responsibilities and qualifications of the school's administrative/management team.

In addition to the Education Director, our school's administrative/management team will consist of the Co-Director, CSMC (back office support), the Life Skills Educator, the Community Engagement Coordinator, and the Secretary.

Co-Director duties:

- Support day-to-day operations of the school
- Advocate for children and families
- Provide student achievement research, data, and analysis
- Direct student assessment
- Write grant proposals
- Oversee support staff
- Assist the Education Director when needed
- Manage procurements
- Maintain accurate financial and business records in conformance with best fiscal practices
- Coordinate all documentation for personnel matters, including the hiring of staff, leaves, payroll, and certifications
- Oversee health and safety requirements
- Implement policies requiring internal fiscal controls
- Implement policies prohibiting conflicts of interest
- Work in tandem with CSMC on all fiscal matters

We intend to have the Co-Director position filled no later than September 1, 2014. We will recruit our Co-Director by conducting a national search and advertising to/in historically black colleges, The Chronicle of Higher Education, Education Week, the local media, the Louisville Courier Journal,

the Indianapolis Star, The Alliance for Public Waldorf Education's website, DOE, Indiana University, University of Indianapolis, Butler University, and Indiana State University.

Qualifications we will seek in a Co-Director are: no less than three years experience as a school principal or assistant principal; extensive experience filing reports to federal, state, and local agencies; extensive experience collecting, analyzing, interpreting and managing student academic achievement data; extensive experience working with families in a school setting; experience in preparing purchase orders, bank deposits, payroll; balancing and managing the budget of a small, autonomous school; overseeing health and safety requirements; and coordinating documentation for personnel matters and extensive experience in grant writing.

CSMC duties:

- Provide support for back office (financial), compliance and reporting, human resources, payroll, and school software.
- Perform administrative responsibilities such as preparing reports for the state, federal government and local agencies
- Work with the Education Director to see ADM count is administered properly
- Prepare purchase orders, bank deposits, vouchers, and information for payroll processing
- Match purchase orders to vouchers
- Keep account of expenditures and allocations
- Under the direction of the Treasurer of the Governing Board, draft fiscal and accountability reports and prepare for annual audits
- Assist the Education Director and Assistant Director in developing school budgets
- Recommend appropriate business-related school policies and procedures

Life Skills Educator duties:

- Counsel students in groups and individually concerning social/emotional issues that accompany academic struggles.
- Collaborate with the Education Director and classroom teachers to provide extra support and guidance for students with behavioral issues.
- Collaborate with the Community Engagement Coordinator to write and distribute TGS newsletter to provide information and outreach to TGS families and community members.
- Collaborate with the Community Engagement Coordinator to write grant proposals and grant reports, particularly in the area of service-learning.
- Conduct and coordinate family visits for TGS staff.
- Plan and oversee TGS seasonal celebrations and events for community-building, recognition and awards, and fundraising.
- Develop handbook of behavioral expectations for TGS staff and families.
- Collaborate with parents in groups and individually to help support their children's social and academic success.
- Plan and implement workshops for students and families to support social/emotional health.
- Participate in ongoing trainings for social/emotional education.

Michelle Henderson, our proposed Life Skills Educator, has a Ph.D. in Education and an MS in Social Psychology from Indiana University. For more on Dr. Henderson's qualifications, see **School leadership, administration, and governance** section above.

Community Engagement Coordinator duties:

- Distribute information about school and community resources via newsletter and email distribution list.
- Maintain community contacts for the EfS and food service programs.
- Collaborate with teachers for service learning
- Offer family education on a variety of topics as needed.
- Facilitate parent/family feedback through surveys or personal contact.
- Coordinate school volunteer efforts.
- Collaboratively oversee the development, organization, and participation in the Parents Club to further support school families and school-community events.
- Oversee Food Service.

Brandi Smith, our proposed Community Engagement Coordinator, received a Masters of Science in Human Development and Family Studies in 2012. Her employment and volunteer experience in the Bloomington community since 1995 gives her a large social network from which to draw community connections. Brandi is currently working as an adjunct instructor at Indiana University, teaching classes in Human Development and Family Systems.

Secretary duties:

We will hire a school secretary, who will be responsible for all front office work.

Please see **Attachment 3** for the resumes of the above individuals.

Governance

Legal Status and Governing Documents. See **Attachment 4.**
Statement of Assurances form. See **Attachment 5.**

Governing Board

1. Governance Structure and Composition

The governance structure of The Green School will include a Governing Board, which will ensure that the school’s mission and vision are guiding the day-to-day actions of the school administrators, staff, and advisory bodies. The Education Director and Co-Director will attend meetings of the Board. The Education Director is responsible for keeping the Board abreast of school developments and progress. The governance structure is designed so that the Governing Board will receive information and recommendations from the Education Director and Co-Director, the School Project Foundation, and the School and Community Advisory Council (SCAT).

The Board will have no more than 15 members and no less than three members. For the first five years of operation, the Board will have no more than three and no less than one member of the Founders Group. By year three there will be no more than two or less than one parent serving on the Board.

Skills represented on the Board will include: legal, business, public relations, accounting, non-profit experience, elementary education, higher education, small business, and social service programming experience. Each Board member was handpicked from an enthusiastic group to comprise a well-balanced Board of Directors. All Board members are excited about serving a dynamic and new model for education and believe in the TGS mission. Professionals were chosen to cover the range of skills necessary to guide TGS through implementation, policy writing, financial start-up, and ongoing operations.

Current Identified Board Members with Advisory Roles:

- Matt Barr: attorney, legal advice
- Mike Beam: Education administration
- Michele Brentano: Education
- Karen Conner: CPA, finance
- Donald Griffin: Real Estate, business
- Theresa Ochoa: Special education research, liaison to Indiana University Education Department
- Brandi Smith: community organizer, Founders Group representative, IU Faculty
- Deb Wilkin: Social work

See **Attachment 6** for completed and signed Board Member Information Sheets and resumes.

2. Pre-Existing Nonprofit Organization. N/A

3. Governing Entity's Responsibilities

The governance philosophy of the Green School is that the Governing Board is responsible for supporting the vision, mission, and core beliefs (see **Appendix B** for The Green School's Core Beliefs) of the school and for providing sound fiscal oversight. The Board will establish policies that govern fiscal management, school business, facility use, personnel, and all fiduciary matters. It will also oversee the policies and practices of reaching out to the community it wishes to serve. Key stakeholder groups include a) administrators and staff, who will have formalized channels to the Board; b) learners, who will have formalized opportunities to give feedback to the Board; c) parents of learners, who will be encouraged to participate in the school; and d) other for-profit organizations and non-profit groups desiring to further assist the learners, who will be contacted for such purposes by school staff and Board members.

In this role, the Governing Board will:

- Meet regularly with school leadership to review the budget and plan for financial growth, development, and sustainability.
- Approve an annual operating budget for the school.
- Develop an annual financial timeline for the school.
- Approve fiscal reports, facilities plans, fundraising plans and reports, marketing plans and reports, contracts, annual performance review of the Education Director and Co-Director, and all human resources decisions.
- Oversee the school's accounting and finance management.
- Ensure proper accounting and reporting practices.
- Create a systematic fundraising plan for the school.
- Review and evaluate the school's relationship and contract with any outside accounting, bookkeeping, and other service providers.
- Support the curriculum and educational plan outlined in the charter by supporting the work of the Education Director and Co-Director, faculty, and staff.
- Create a learner recruitment plan in the event of low learner enrollment in any particular school year.
- Develop a long-range, strategic plan.

4. Procedures

The governing board of The Green School has met 13 times since its formation, and has a planned schedule of monthly meetings (with the exception of December). The focus of each meeting will be

determined by the current and relevant needs of the school, and will always be guided by the governance philosophy as stated above.

In compliance with the Access to Public Records Act, the board will keep and preserve all required records. In addition, the board may, in its discretion, disclose certain records to the public. It will review requests for access to such records on a case-by-case basis. The board will develop procedures for requests for access. When access is denied, the board will comply with the APRA in informing the person making the request. It will also adopt formal policies for record keeping and regular oversight.

In response to the Open Door Law, the board will post notice of all meetings at the meeting building at least 48 hours prior to the meeting, excluding weekends and holidays. It will also provide notice to local news media organizations that have filed written requests to receive such notice. Along with the notice, the board will post the agenda for that night's meeting. Memorandum or minutes of each board meeting will be taken and preserved. These will be available for public inspection within a reasonable amount of time following each meeting. The memorandum will include the date, time, and location of each meeting, as well as a record of who is present, the actions that were taken (including vote tallies), and the substance of the matters proposed and discussed.

5. Ethics and Conflicts of Interest. See Attachment 7.

6. Advisory Bodies

TGS' School Community Advisory Team (SCAT) will serve the school and the Governing Board by crafting proposals for Board review, exploring multiple options for difficult issues, obtaining multiple perspectives on issues that concern the school community, and providing feedback to the school Board and school leadership team. The SCAT will be comprised of students, parents, teachers, teaching assistants, and involved community members.

7. Grievance Process

The Green School will address grievance issues arising from learners or parents on a fair and equitable basis. As a first step, we anticipate school administrators and staff will attempt to resolve most learner and parent grievance concerns through informal conversations. However, if informal discussion is unsuccessful in resolving the concern or if the grievance issue is severe, the school will take the following procedural steps:

- Step One: Administrators or staff meet privately with learner or parent to discuss matter and attempt to arrive at resolution.
- Step Two (if grievance persists after Step One): Grievance presented, in writing, to Governing Board, with administrator and learner/parent input.
- Step Three: Board makes a decision based on the written submissions and personal interviews. They will make their decision based on the evidence and on the school's mission, vision and core beliefs. Their decisions will be in accord with any applicable state and Federal requirements.
- Step Four: Leadership administrators will follow through on Board's decision.
- Step Five: If the resolution to the grievance is not satisfactory to the concerned party, the concern can be taken to the Indiana Charter School Board.
- Step Six: If the complaint is related to a Special Needs learner and no satisfaction is achieved after the Indiana Charter School Board office has made a decision, then a complaint form can be completed and submitted to the Indiana Department of Education (IDOE) legal division. The complaint must have occurred within one year of the date the complaint is received by the

IDOE. All rules and regulations in regards to filing a complaint can be found in section 511 IAC 7-45-1 of Article 7.

Grievance policies will be outlined in The Green School Handbook, and will be given to every family, as well as posted on our website.

SECTION II: SCHOOL DESIGN

Education Plan

Curriculum and Instructional Design

1. Framework for proposed instructional design

The Green School (TGS) has chosen an arts-infused curriculum and pedagogy deeply integrated with teachings of social justice and environmental sustainability. We will draw our school's curriculum and methodology from a number of current well-established, research-based programs. Current research shows that our school's chosen curriculum and instructional design will assist students in meeting or exceeding Indiana's Academic Standards. The following sections describe the school's learning environment, class size and structure, curriculum overview, use of technology, plans for hiring highly qualified educators, and research to support our program.

Basic Learning Environment/Class Size and Structure

The learning environment at TGS will resemble a traditional classroom in some ways, but will be quite unique in other ways. Classrooms for Kindergarten and primary grades will have a minimum of 800 square feet for 25+ students while classrooms for intermediate/middle grades will have around 900 square feet for 25+ students. Early childhood classrooms (K, 1, and 2) will have one full-time teacher and one full-time aide while students in grades 3-5 will have one full-time teacher. When the middle school is added, there will be one full-time teacher per classroom. Students are grouped according to age (i.e., first graders are 6 and 7 years old). At The Green School, classrooms will practice looping. Teachers will stay with their classes ideally for three years in the elementary grades and two years in the middle school. For example, children will be with the same teacher in grades 1, 2, and 3, and with another teacher in grades 4, 5, and 6. In seventh and eighth grade, two teachers (one who is certified in math/science and one certified in language arts/social studies) will work with the students.

The physical classrooms will have desks and chairs made of natural materials (preferably wood). The classrooms will be uncluttered and beautiful, adorned with natural materials with no "pre-manufactured" posters, and the walls will be painted using a technique called "lazuring" (see **Appendix C** for an image of classroom lazuring). Research shows that an uncluttered learning environment helps students to better concentrate and brings down their stress levels (Jensen, 2002). Jensen further states that the classroom learning environment is essential to student success. In addition to promoting an absence of clutter, he lists pleasant surroundings, cool temperatures, and the presence of plants as specific items to enhance the learning environment.

Finally, in keeping with our place-based model of teaching, our outdoor spaces will be part of the children's learning environment. The gardens, meadows, and woodland areas around our school will also serve as classrooms for our children and the greater school community. According to Bair (2003), our children need to create their own relationship with the environment and see the connection between themselves and the earth so they can learn to hold reverence for all things from the natural world. If this relationship is developed early, our children are more likely to become advocates for the environment.

Curriculum Overview

Kindergarten:

Language Arts - Oral Storytelling (fairy tales); Retelling stories; Introduction to letters; Phonics; Reading on or above grade level; Writing words and sentences
Mathematics - Quality of Numbers; Basic Facts up to 10; Number Sense
Science - Nature Studies, Education for Sustainability (EfS) Games; Socialization
Social Studies - Multicultural Stories, Festivals, Foods
Practical Arts Handwork; Cooking; Gardening; Cleaning
Fine Arts-Singing; Painting; Drawing; Beeswax Modeling
Technology and Physical Education

First Grade:

Language Arts - Oral Storytelling (fairy tales); Retelling/Sequencing stories; Phonics and phonemic awareness - letter blends; Reading at or above grade level; Poetry; Spelling; Writing sentences and paragraphs
Mathematics - The 4 Processes; Basic Facts up to 100; Beginning Place Value; Geometric Drawing through Form Drawing; Measurement through practical activities (Gardening, Handwork)
Science - Nature Studies, Observation Skills, EfS Gardening; Service work
Social Studies - Communities, Multicultural Stories
Practical Arts - Handwork; Cooking; Gardening; Cleaning
Fine Arts - Singing; Pentatonic Flute; Painting; Drawing; Form Drawing; Beeswax Modeling
Technology and Physical Education

Second Grade:

Language Arts - Storytelling (fables and legends); Retelling/Sequencing stories; Comprehension; Reading at or above grade level; Phonics and Phonemic awareness; Writing – opinion, informational, and narrative pieces; Spelling; Grammar; Poetry; Drama
Mathematics - The 4 Processes; Basic Facts to 144; Place Value; Higher Level Algorithms; Geometry through Form Drawing; Measurement through practical activities
Science - Nature Studies, Weather, Day and Night, EfS, Gardening; Service Work
Social Studies - Heroes and Heroines, Multicultural Stories, Communities
Practical Arts - Handwork; Cooking; Cleaning
Fine Arts - Singing; Pentatonic Flute; Painting; Drawing; Form Drawing; Beeswax Modeling; Folk Dancing
Technology and Physical Education

Third Grade:

Language Arts - Storytelling (Creation Stories from around the world); Reading at or above grade level; Decoding words with prefix and suffix knowledge; Spelling; Grammar; Poetry; Drama; Writing – opinion, informational, and narrative pieces; Spelling; Grammar
Mathematics - Basic Facts to 144; Place Value; Higher Level Algorithms; Measurement; Time; Money; Geometry through Form Drawing, practical work (i.e. Gardening) and; Prime Numbers
Science - Gardening; Farming; Building; EfS; Gardening; Service Work; Building Projects
Social Studies - Stories of Ancient History, Studies of Practical Life
Practical Arts - Handwork; Cooking; Cleaning; Building
Fine Arts - Singing; Diatonic Flute; Painting; Form Drawing; Beeswax Modeling; String instrument
Technology and Physical Education

Fourth Grade:

Language Arts - Storytelling (Norse Mythology); Biographies; Reading at or above grade level; Writing - opinion, informational, and narrative pieces; Drama; Poetry
Mathematics - Basic Facts to 144; Fractions (with all 4 operations); Decimal Fractions; Higher Level Algorithms; Place Value to 100,000; Geometry (area, perimeter) through Form Drawing and Averaging
Science - Zoology, Nature Studies; EfS; Gardening; Service Work
Social Studies - Indiana History, Local History; Local and State Geography
Practical Arts - Handwork; Woodworking; Cooking; Cleaning
Fine Arts – Singing; Recorder; Painting; Drawing; Form Drawing; Clay Modeling; String instrument
Technology and Physical Education

Fifth Grade:

Language Arts - Extended skills; Stories of ancient cultures; Greek myths; Reading at or above grade level; Writing - opinion, informational, and narrative pieces; Drama; Poetry; Grammar; Spelling
Math - Advanced skills (higher level algorithms); Decimals; Fractions; Metric System; Geometry through free-hand geometric drawing; Formulas
Science - Botany; Zoology; Natural World; EfS Service Projects; Gardening; Nature Studies (Earth Science)
Social Studies - Greek history; Ancient history; US Geography; US History and Government
Practical Arts - Woodworking; Handwork; Gardening
Fine Arts - Recorder; Orchestra; Singing (choir); Painting; Drawing; Clay Modeling
Technology and Physical Education

Sixth Grade:

Language Arts - Biographies; Extended skills in Grammar; Spelling; Writing - opinion, informational, and narrative pieces; Drama; Poetry
Math - Pre-Algebra; Percentage; Interest; Profit/Loss; Geometric drawing; Geometric Formulas
Science - Gardening; Geology; Physics; Astronomy; EfS Service Projects
Social Studies - Roman History; Troy; World Geography; Crusades; Medieval Life
Practical Arts - Woodworking; Handwork
Fine Arts - Recorder; Orchestra; Choir; Painting; Drawing (black and white drawing, shadows); Clay Modeling
Technology and Physical Education

Seventh Grade:

Language Arts - Biographies; Arthurian Legends; Reading and Writing Poetry; Creative Writing; Informational Writing (research reports); Narrative pieces; Drama; Poetry; Advanced Grammar and Spelling
Math - Business Math; Graphing; Pre-Algebra/Algebra; 2-D Geometric drawing and theorems
Science - Physics; Chemistry; Gardening; Intro to Physiology; Health; Nutrition; Astronomy; EfS Service Projects
Social Studies - Renaissance; Reformation; World Geography
Practical Arts - Woodworking; Handwork
Fine Arts - Recorder; Orchestra; Choir; Drawing; Painting; Clay Modeling
Technology and Physical Education

Eighth Grade:

Language Arts - Short stories; Story elements; Shakespeare; Writing – Short Stories, Essays, Research Reports, Poetry, Grammar, Spelling
Math - Algebra; Set Theory; 3D Geometry; Solid Geometry; Practical Math
Science - Chemistry; Physics; Human Anatomy and Physiology; Thermal Physics; Meteorology; EfS Service Projects; Gardening
Social Studies - US History; Current events; Biographies of great Americans; Revolutions
Practical Arts - Woodworking; Handwork
Fine Arts - Recorder; Orchestra; Choir; Painting; Drawing -3D; Clay Modeling
Technology and Physical Education

The Use of Technology in Delivering Instruction

Technology use will increase as the students advance through the grades. Because young children are sensitive to the visual and auditory stimulation that surrounds them, it is important to keep in mind that the majority of literature suggests that very young children learn less from technology than from real-life experiences (Anderson & Pempek, 2005).

Kindergarten and First Grade

Students in kindergarten and first grade use technology to publish their writing, to make designs and pictures to accompany stories, and to practice language arts and math skills.

Second and Third Grade

Second and third graders also use technology to publish their writing, make designs, and practice math and language arts skills. In addition, they learn to use technology to help design practical projects, such as the school garden and small structures (i.e. garden sheds), which are part of the third grade curriculum.

Fourth and Fifth Grade

As students mature and begin to do more detailed writing, they learn to use the computer for research as well as publishing. Students also use technology to aid in their study of botany and zoology.

Sixth, Seventh, and Eighth Grade

Middle school students delve even more deeply into research for reports and presentations and learn to use technology for multimedia presentations. They are introduced to graphing calculators in mathematics, design programs for geometry, and detailed science applications for virtual experiments.

Ensuring Highly Effective Teachers

All teaching staff will meet the Highly Qualified (HQ) criteria in accordance with IC 20-24-6 and the state certification requirements prior to employment. If the most qualified candidate for an area of need does not meet the HQ criteria but does hold a current teaching license in the state of Indiana in a relevant teaching area, a temporary/emergency license will be explored and, when appropriate, secured. For further information see **Section III: School Leadership and Staff Hiring**.

Evidence Based Support

The book *Transformational Teaching: Waldorf-inspired Methods in the Public School*, written by Mary B. Goral, one of our founding members, is an important study that specifically addresses schooling inspired by Waldorf education in the public school setting. Dr. Goral's book looks at public school teachers who implemented teaching inspired by Waldorf education into their urban

classrooms in Louisville, KY. This qualitative study found that students in these classrooms were more engaged in the learning process and were happier in school. Teachers reported that methods inspired by Waldorf education helped them build strong classroom communities and also kept the teachers' passion for teaching alive (Goral, 2009). Additional research on charter schools inspired by Waldorf Education and their outstanding performance is discussed in the Executive Summary.

In addition to the research already stated, evidence-based support for our school model is examined in **Section IV: Innovation**.

2. Instructional Strategies

The morning lesson is primarily teacher-led, but uses a variety of instructional strategies that meet the needs of all learners. Students begin their day with the morning circle, which involves the kinesthetic, musical, interpersonal, linguistic, and mathematical approaches. Following the morning circle, the teacher leads a review of the previous day's content. The review uses a variety of instructional strategies and the teacher ideally rotates these strategies so as to keep and hold the children's interest. For example, students can review a story by acting it out, using verbal recall, drawing their favorite part of the story, or using other artistic media to represent the story. Other strategies such as "think, pair, share" or "jigsaw" are also used. Following the review, the teacher delivers the new content through a story, biography, or demonstration. Students are then given the opportunity to practice what they are learning. For example, if students are studying place value, this is the time where they work with manipulatives such as Base Ten Blocks in order to have a hands-on experience with the subject. They also work problems either alone or in pairs or small groups. The morning lesson then ends with artistic work that goes into their lesson book (see **Appendix D** for sample pages of a morning lesson book). Using the place value lesson, students might put a picture from the story into their lesson books or they may make a colorful place value chart. All of the various learning styles are met during this two-hour morning lesson block. Students who learn orally hear the story. Those who learn artistically can use their lesson book to demonstrate what they've learned. Gifted students are encouraged to express themselves through their detailed story recall or in their drawings. Students with special learning needs are met by the wide range of methodologies that exist in the morning lesson. Preliminary research conducted at a private school for children with special needs has shown that students' level of engagement and recall when listening to a story is significantly greater than when they learn content through traditional methods (Goral, 2012).

Students spend their time after the main lesson in practical arts classes, fine arts classes, skills classes, or in their EfS class blocks. These 45 minute classes use a variety of instructional strategies. In handwork, woodworking, and gardening classes, students use their hands to do work. These classes are teacher-led, but once instruction is given, students work on their own individual projects. In handwork class, students are able to chat with one another while working on knitting or sewing projects, building community and using their inter- and intrapersonal approaches. Furthermore, the practical arts integrate mathematics and science into nearly every class. If students are doing a cross-stitch project in handwork, they need to work out the mathematical pattern before they begin. If they are planting or harvesting vegetables in the garden, science skills are naturally interwoven. Fine arts classes, including choir, recorder, orchestra, clay modeling and painting are teacher-led. However, students actively participate throughout each class. Voices blend together in choir to create beautiful harmonies. Clay modeling and painting classes attend more to the individual so students are asked to be quiet during these classes.

Skills classes, which are designed to focus on specific skills in mathematics and language arts, take on more of a workshop feel. *Readers and Writers Workshop* will be used for the language arts skills

classes and a similar set-up will be used for the math skills classes. Teachers begin the class period with a mini-lesson where the skill is described, demonstrated, and discussed. Students are then given time either individually or in small groups to practice the skill. At the end of the class period, the whole group reconvenes to discuss and share their work. The beauty of the workshop model is that students of all ability levels benefit. If the skill being practiced is, for example, paragraph structure, high-ability students listen and contribute during the presentation, then write paragraphs during the work time and share at the end. Struggling writers receive help during work time from the teacher, the aid, or other students.

In the EfS class sessions, students will have the opportunity to take classes from a variety of instructors (classroom teachers and community volunteers) who each will use instructional strategies that they feel best meet the needs of children. From hands-on community-based activities to work in the garden, children will experience engaging instruction.

Students who learn through movement will experience this every day – multiple times. The same holds true for students who learn interpersonally or intrapersonally, through the musical arts, the fine arts, or through nature. The pedagogy will incorporate methodologies that meet the needs of all learners.

3. **Curriculum Scope and Sequence.** See **Attachment 8.**

4. ***For Blended Learning Operators only.*** N/A

Pupil Performance Standards

TGS' educational program will integrate creative teaching methodologies consistent with the Indiana Academic Standards and Common Core Standards to provide a learning environment that assures each student meets or exceeds State standards for achievement. One of the primary goals of TGS is that all of its students score in the proficient or superior ranges on state exams. TGS' educational approach will provide students with the necessary skills and tools to achieve high performance levels, and will promote cooperation and social learning, provide the tools for complex thinking and problem solving, enhance effective communication, and instill a lifelong love of learning and a sense of personal and community responsibility.

1. **School's exit standards for graduating students.** See **Attachment 9.**

2. Policies and standards for promoting students from one grade to the next

Because our school will use looping (three years with one teacher in elementary grades and two years with one teacher in middle school), our students will have the opportunity to stay with their peers and teacher as they grow academically and emotionally. After the three-year loop, there will be a transition meeting with the original teacher and new teacher where each child's academic, social, and emotional record is discussed in detail and passed on. We will use three reporting periods each year and during the third year's fall conference (for example, when children are in the third grade), parents will be given the promotion criteria. The same will happen for sixth grade students who are moving on to middle school and for eighth grade students who are moving on to high school.

High School Graduation Requirements (*High Schools Only*). N/A

School Calendar and Schedule. See **Attachment 10.**

School Culture

1. The culture of the proposed school.

Our primary mission is to educate the whole child – head, heart and hands. This principle is reflected in all aspects of our curriculum and culture. Our commitment to educate the whole child espouses active learning; emphasizes personal, social, and ecological responsibility; honors reflection as a crucial component of knowledge acquisition; and views balanced human development on an equal plane with academic learning. The school's culture of inclusion, joy, wonder, and creativity helps students discover their gifts, identify their passions and dreams, and better understand their place in our rapidly changing world.

2. Implement this culture for students, teachers, administrators, and parents.

The school's daily routine and practices reflect our core philosophy, and begin the moment the school day commences. Every morning, before lessons begin, students listen to or recite an inspirational quote or poem that reminds them of their ability to shape their own lives, and impact the lives of others by being receptive to the world around them. They are called to remember that they are a unique part of the greater whole, and that their contributions matter.

This fundamental message carries into the learning experience of the main lesson block, as children engage in their own learning through active listening, creative expression, physical movement, and group collaboration. A spirit of curiosity and exploration permeates every classroom, as a dedicated teacher presents the course material and encourages students to identify how it excites them – moving the learning experience through the senses to touch both the mind and the heart.

At lunch, children learn by imitating the healthy, sustainable practices modeled at the school. Students eat a healthy, organic lunch and compost their waste for use in the school garden. Wherever possible, bottles and containers are recycled, utensils washed and reused.

Afternoon lessons again reinforce our school's philosophy of social, ecological, and personal responsibility. Examples include children planting, cultivating, and harvesting food in the school garden; spinning yarn from sheep's wool to knit a scarf in handwork class; and carving a spoon from a block of wood in woodworking class. Learning the practical arts by drawing connections to the natural world strengthens a child's self-esteem and highlights the importance of caring for our planet. The intellectual concepts driving these ideas are not presented directly to the students but are instead naturally germinated in the children through the example of the school's curriculum and core values.

Our school's culture reaches beyond the schoolyard to impact a student's family life. Building a resilient, and vital community of families is essential to the success of the school. We seek to maintain a vibrant community of families and encourage parental involvement by inviting them to seasonal festivals, performances, displays of student work, and evening workshops geared to healthy living and the arts. Many of these opportunities will also be offered to the public to draw in prospective families and gain the support of the larger supporting community.

Effective and healthy communication is our best tool for fostering a vital school culture. Clear guidelines for sound and compassionate communication are established and made available to everyone involved in the life of the school. These guidelines serve as a shared template, not only in handling daily school matters with students, but also in handling matters among teachers, administrators, staff, and parents. We solicit feedback from the parents and regularly inform them of the decisions being made for the school community. Transparency is of utmost priority.

We welcome new families, including, when space allows, those entering the school mid-year, through a series of activities designed to acquaint families with The Green School's culture, and uniquely integrated approach. Prior to entering the school, a family attends an informational meeting to learn about the school's philosophy and pedagogy, and to see the school grounds and learning environment. Interested parents will be encouraged to talk with the school director, and prospective students will be encouraged to visit the school and shadow a fellow classmate for a day. New students will be assigned a 'class buddy', a peer who can answer questions and help the new student get comfortable in the classroom. Likewise, incoming families will be assigned a volunteer 'friend family' to help ease their transition into the school community.

3. A typical day for a student

Hi! My name is Tyler and I am in first grade at The Green School. I love my new school and I am learning a lot. It's different from where I went to kindergarten. When I first get to school, I go straight to my classroom. I line up outside my classroom door and my teacher greets me. She shakes my hand and tells me good morning. She usually asks me a question about something – like my younger brother or my dog. Then I put my things away in my cubby. After that the teacher rings a chime and we all get quiet and stand up behind our desks. Then we say our morning poem. It's the same poem every day and talks about doing good work and being kind to one another.

After our morning poem, we get to do our morning circle, which I really like. We do lots of songs and poems and get to move around and play games. I've memorized all of the songs and poems already. Then we get to play our flutes. It's really fun and I'm good at it. After we put our flutes away, our teacher has us tell her about the story from yesterday. Sometimes we get to act it out and sometimes we get to draw our favorite part and sometimes we get to write about it. Then she tells us a new story. I'm excited because today she's going to tell us about Percival Plus. He is this guy who helps us learn how to add. Her stories are really good. After that we will practice our math. Right now we're learning how to add a bunch of numbers in columns. Then we get to do a picture in our lesson books and put in some math problems. We might write about the story, too. We write about the stories a lot.

So then we get to have a break and have a snack. We aren't allowed to have candy or anything that's not good for us. Then we go outside. My friends and I are building a fort. It's really cool.

After we come in, we go to the bathroom and then we have math and practice our basic facts and other stuff. Then LUNCH! The food here is really good. I didn't think I'd like it, but I do. My mom says it's healthy food. After we eat we get to go outside again. I really like that.

After lunch we have classes with different teachers except for reading and writing practice and that's with our teacher. Today I think we have games. I love that class because we do so many fun things. Then we go to handwork (I'm learning how to knit and I'm knitting a case for my flute). I have to count stitches and pay attention. Sometimes it's hard. Then we get to practice our reading and work on our writing too. I think our last class is Gardening today. This is different, because some kids go with teachers from other classes and there are some older kids in my group and they're nice to me. Then we go home. I really like my school. I'm learning a lot and it's not boring.

4. A typical day for a teacher

Hi! I teach fourth grade at TGS and it is the best teaching job I've ever had! I usually get to school around 7:30 so I can get my room ready and feel prepared to be with my students for the day. My room is painted the most exquisite color of green. It's tidy with very little in the room to distract my students. Most of the materials are naturally made. On the blackboard is a colored chalk drawing I

did of the state of Indiana. It's a map with all of the landforms on it. At 8 am, I go into the second grade teacher's classroom and many of my colleagues are gathered there. We begin our day with an inspirational poem or recitation. It's a great way to start the day, to remind myself of what I am here for. My students begin coming into the classroom around 8:15. At 8:30 I promptly ring the chimes, then go around to each student and shake his/her hand. It allows me to tune in to every child to determine if they are upset in any way or in need of extra attention. We then say their morning pledge and start our morning circle. We are currently studying Local and State Geography, so our circle has poems and songs about Indiana. We also continue to practice our multiplication tables in the morning circle, as many of the children still have not memorized them. After the circle, which lasts about 20 minutes, the students go back to their desks.

Now they are awake and ready to think. I always begin the next part of the main lesson with a review. Yesterday I told the students a story about some of the first white settlers in Indiana. I used a chapter from "Bears of Blue River" by Charles Major. I read the chapter 2-3 times on my own, then put together the key pieces and was able to craft it into a story. The children engage and retain the material so much better through storytelling. They loved yesterday's story about Balsler (the main character) and how he shot his first bear. We are working on vocabulary, grammar, and sequencing in language arts, so today when they retell the story, I will ask the children to use colorful, describing words (adjectives and adverbs). As they retell the story, I will write their words on the board.

Next comes the new material. Since we are still discussing early settlers, what they ate, where they lived, and how they survived, I decided to tell another story from the "Bears of Blue River" book. There is a great chapter on the garden and what the family eats. After I've told the story, we will do some writing using the words I put on the board. I will ask the students to write a summary of the story from yesterday. This will be a rough draft. Once they have finished writing, they will have an opportunity to work in their lesson books. Today I want them to draw the land form map of Indiana that is on the board. The students who learn through artwork always love this part of the morning lesson. A different feeling comes over the room as they get out their colored pencils and start to work. We end the morning lesson at 10:30 with a poem. The poem we use talks about honoring the work we did in the morning and being proud of doing our best work.

Students then get out their snacks and when finished, go outside for some exercise. I am not on duty today, so I will take a break. When they come back in, we will be working on higher-level algorithms during the math skills class.

We always start the skills class with mental math and then with some problem solving. The mental math really keeps the kids sharp and the problem solving, a major NCTM standard, is going better than I thought it would. We work on a problem solving strategy each week and the students are actually getting to be better at word problems! After mental math and problem solving, I introduce the concept we are working on, give the kids their problems, then work with small groups or one-on-one with students who need help. This is a time when I can really help students who are struggling.

Our lunch comes after this class, and students eat great, healthy food prepared by Bloomingfoods. I even eat the school lunches. The kids go outside then and are watched by one of the aids. I get to take a break, talk with my colleagues and rest a bit. Our lunch is 45 minutes long.

After lunch my class goes to handwork where they are working on cross-stitching. It's amazing how the handwork curriculum goes along with other subjects (math in this instance). Then they come

back to the classroom for painting. Today we are painting a landscape from southern Indiana. It will involve the same landforms they are learning about in Geography. After painting, we will do *Writers Workshop*. You might remember that the students began a rough draft of an essay about the story of Balser shooting his first bear. Well, I plan to begin the mini-lesson of the *Writers Workshop* by discussing those same juicy adverbs and adjectives. I have prepared a short paragraph filled with descriptive words. Students will then have a chance to work on their drafts. They will be at different stages, so some will be composing, while others are involved in peer editing. I will most likely be helping my struggling writers. We end our *Writers Workshop* with students sharing what they've written. The last class of the day is always Education for Sustainability. I always look forward to this class, as I get to work with a smaller group of kids from all different grade level AND I get to teach a subject that I am totally passionate about. I've been studying permaculture for about ten years, so this is what I'm teaching right now. Then it's time to pack up and go home. We always end our day like we started it – with an ending poem and a handshake goodbye.

Supplemental Programming

1. Summer school

Summer school will not be offered in our school's initial years. If summer school is established, it will be for the enhancement of academic development with skills classes, in addition to building the school's garden program. In this case, administration would consider the cost of staffing and building requirements compared to the potential revenue of operating a garden summer camp.

2. Extra and co-curricular activities

Extra and co-curricular activities offered by the school will include afterschool care Monday, Tuesday, Wednesday, and Friday from 3:45-6:00pm, and Thursday from 1:30-6:00pm (due to early dismissal). After school care will include unstructured activities such as free-play on school playgrounds or in the all-purpose room. Homework help will be available for students who want to participate. The program will be funded through private pay and offered to families in need on a sliding scale to cover costs for the program. No profit is intended for this service. Our choice to employ a flexible calendar means that similar programs will be offered during school breaks which do not overlap with the larger community's school breaks (i.e., Monroe County Public Schools and Indiana University). We consider this a service to families who may need childcare at times when our schedule is not in line with the larger community.

Clubs will also be offered at TGS. Efforts will be made to gauge interest and staff opportunities for interested students to participate in after school garden, chess, and handwork clubs. TGS is interested in offering intramural sports clubs. Such a program would be led and coordinated by volunteers, and feasibility would be weighed in accordance with interest from students and parent volunteers.

3. Strategies to address student mental, emotional, and social development and health

The physical, mental, emotional, and social health of our students will be of highest priority. It is considered in every aspect of our integrated curriculum, will motivate every decision made by our teachers and staff, and will be an important barometer by which we judge our school's success. By our choice of educational model, we seek to meet students in a developmentally appropriate way, creating a learning context that is both meaningful and relevant to their lives. We seek to establish strong, connected relationships, not only between our students and teachers, through a three-year looping arrangement, but also with family and community members. Our commitment to this vision is evidenced in the establishment of an administrative position devoted solely to family outreach and community building. Parental involvement will be greatly encouraged, with the aim of creating

a 'school family' environment. Weekly newsletters, afterhours family programming, and volunteer opportunities will keep families informed, involved, and connected, helping to create a network of camaraderie and support that will in-turn bolster each student's confidence and enthusiasm for learning. Clubs, intramural sports, musical groups, and art-centered gatherings will offer students the opportunity to pursue their individual interests and passions, and will be a natural extension of TGS's integrated educational philosophy. Finally, our implementation of the *Response to Intervention* model will help to identify those students who need extra attention, both academically and emotionally. Through frequent class screenings, teachers will have an ongoing understanding of their class's strengths and weaknesses, and will be able to direct struggling students to smaller group learning situations, or Special Education resources. Our Life Skills Coordinator will tend to students who need additional help acclimating socially or emotionally. Above all, TGS seeks to instill a deep feeling of belonging in the students and families that it serves.

4. Student Focused Activities and Programs

The Education for Sustainability K-8 curriculum will be an ongoing and foundational component of student programming, and will be based on standards developed by the US Partnership for Sustainable Development. EfS is an effort to bring the concepts of ecological sustainability and social justice to education. Please see **Section IV: Innovation** for a description of our planned EfS program.

Special Populations and Students at Risk

1. Overall plan to serve students with special needs

TGS will use The Response to Intervention (RtI) approach in identifying the needs of exceptional learners. RtI is supported by the Bureau of Exceptional Education and Student Services, and noted by the Indiana Department of Education. The systematic approach is a process for evaluating the needs of all students, not just students targeted for special education, and provides a path for monitoring progress and understanding needs through well-thought-out, carefully identified and implemented strategies for academic and behavioral needs.

The population of students who choose to attend The Green School will inform many of the decisions surrounding staffing the school. The School anticipates an exceptional learners' population of approximately 15 – 17% of total enrollment. Demographically, this comprises approximately 30 students with Individual Educational Programs (IEP) in the first year and 50 students with IEPs at capacity. This includes English Language Learners, intellectually gifted children, and at-risk students.

2. Meeting the needs of students with mild, moderate, and severe disabilities

a. How the school will identify students with special education needs

A team will be formed to develop processes and practices that meet specifications of (state, federal and special education laws) IAC 511, Article VII, and Federal Law IDEA, ADA 1990 and Part 504 of the Rehabilitation Act of 1973, for identification of children with potential special needs. Recurring informal and formal assessment in classrooms, teacher and specialist observations, and anecdotal instructional and behavioral artifacts will be used to determine if a child is in need of special services. All children will be treated on an individual professional basis. The Indiana Academic Code will be followed, and will guide services.

b. Evidence-based instructional programs, practices, and strategies

Student needs will be supported through the interventions set in place with a Multidisciplinary Education Team (MET), with focus on academics and behavioral needs within the Response to Intervention (RtI) process. Classroom teachers, instructional and support staff, and parents will

guide identification of students the MET will work with in understanding needs, interventions, need for evaluation and potential identification of an IEP. Students will be identified and evaluated in accordance with state and federal regulations.

This whole-school model decreases gaps in time for identifying, understanding, and supporting students with barriers that impede learning. The RtI model is a methodology that integrates strategies and identification of resources for general education and exceptional learners in a caring, supportive, focused and data based approach. It ensures effective, high quality instruction in the general education setting and beyond. The services and interventions set in place are introduced within a tiered system that allows increasing levels of intensity over time guided by baseline and benchmarking progress. The rate of progress guides inform educational decisions and may lead to recommendation to consider eligibility for exceptional student services. Benefits of RtI include:

- Provides a faster path for assessing need and implementation of interventions.
- Hones in on specific needs and deficits rather than relying on general statements of need.
- Interventions are implemented and monitored for progress over time, with modifications set in place as benchmarking occurs.
- Progress monitoring keeps the focus on student progress and growth rather than designated labels.
- Interventions allow informed decisions with data linked directly to student needs.
- Adoption of RtI results in instructional and support staff knowledgeable of student needs and interventions with proven success. The RtI process will enable our school to be 'participant flexible' based on each student's needs.

c. Monitoring the progress and success of students with mild, moderate, and severe needs

Once a student is identified, the appropriate staff, experts and parents will meet to develop an appropriate service plan that will meet the needs of the student, with recurring meetings no less than once annually. The following is a list of direct and related services that will be provided to serve the needs of the exceptional student population:

- Inclusionary Model: Students who require extra services or instructional assistance will work with the appropriate Exceptional Learners' teacher in an inclusionary model.
- Consultation and collaboration: Students whose service plan does not require more intensive support services but require some assistance per the IEP will receive extensive monitoring through consultation and collaboration with staff.
- Edu-Psych Evaluations: Contracted Services.
- Speech Therapy, Physical Therapy & Occupational Therapy: Contracted Services.
- Hearing / Vision Impaired: Contracted Services.
- Behavioral Counseling / Daily Living Skills: Students struggling with behavioral issues that impede the achievement process will meet one-on-one or in small groups with behavioral specialists.

d. Promoting students with special needs

After each of the looping cycles, there will be a transition meeting with the original teacher, the special education teacher and new teacher to decide whether or not the student will be promoted.

e. Provide qualified staffing for students with special education needs

The Board intends to hire two licensed, highly qualified staff members to provide services for students with exceptionalities. One staff member will be a full-time special education teacher and the other will be a part-time Special Education Coordinator. We will contract services within the community to meet the needs and requirements of our population of exceptional learners and to provide expertise and guidance in maintaining compliance with regulatory and legal requirements.

We plan to have one full-time certified special education teacher work with teachers in identifying students who qualify for services, including students with disabilities and English Language Learners (ELL), and to service student IEPs. Additional special education instructional staff will be added over time as enrollment and case load dictates.

The exceptional learners' staff member will be responsible for assisting the classroom teacher in designing a classroom that will meet the needs of all students in the class. Therefore, we intend to use an inclusion model to the fullest possible extent. This may not always meet the needs of the students in each class, so accommodations will be set in place to address unique needs. When a student requires extended services, we will, whenever possible, use flexible time within the day to provide students the added instruction or services needed to ensure success.

3. Meeting the learning needs of English Language Learner (“ELL”) students

As we plan community outreach and information sessions to inform the Bloomington community about The Green School, our founding group will target specific organizations and neighborhoods where ELL families are likely to be found, such as the cultural centers at Indiana University, including The Latino Cultural Center and The Asian Cultural Center. We will also provide information, with translations, to church communities, including the Latino Mass at the St. Paul Catholic Center and The Korean United Methodist Church.

a. Identifying ELL students

English Language Learners (ELL) will be assessed upon entering the school. The teachers will receive training to develop strategies to better serve this population. A timeline will be put in place to accommodate the ELL students in a timely manner:

- Home Language Survey: Date of registration or within first week of school.
- Classification of ELL Levels: Twenty days after registration or return of survey.
- Student Placement in ELL: One month after student enters The Green School.
- Teacher Certification/Personnel: Establish schedule upon opening of school.
- Post Program Review: One month after student enters the school.
- Reclassification or Exiting of ELL Students: Any point in the year after four (4) months of assessment.

b. Instructional programs, practices and strategies

TGS will use instruction that honors and uses the students' cultural strengths and that involves teaching tolerance and appreciation of culture. Specific effective teaching practices include scaffolding, involvement, continuous feedback, explicit instruction in phonemic awareness, fluency, vocabulary, and comprehension. Other effective teaching methods include concept mapping and cooperative learning. Teachers at TGS will work with families closely to ensure a strong home-school connection.

c. Assessing and monitoring the progress and success of ELL students

All students at TGS will participate in the required standardized testing and teachers will continually monitor the progress of students through formative and summative curriculum-based measures. TGS will provide accommodations, such as reading the test, allowing for extra time, and clarifying questions for any ELL student whose IEP requires this. Teachers will continuously monitor the progress of all students, including those who are English Language Learners. Twice monthly teachers will meet in their Critical Friends Group to discuss student achievement.

d. Providing qualified staffing for ELL students

Two of the founding members, who will be working at TGS as educators, have Masters Degrees in Teaching English as a Second Language, and they will be available to work with ELL students along with certified staff. The Green School will contract services within the community to meet the needs and requirements of our population of English Language Learners in order to provide expertise and guidance in maintaining compliance with regulatory and legal requirements.

4. Meeting the learning needs of students who are performing below grade level

A three-tiered RtI model with a focus on inclusion, will allow all students, including those who are performing below grade level, to work together in harmony with their peers. As needed, supplemental services will be provided, including small groups, co-teaching, and individual one-on-one instruction and pull out to other classrooms. The design is fluid, allowing intentional focus and rapid remediation of deficits. It is intentional in design and support for the child, promoting understanding, positive engagement and ownership.

The Multidisciplinary Education Team for implementation of RtI allows a systematic practice for targeting and understanding student needs. Prior to the opening of the school year, staff will be trained on RtI and a MET team will be formed. Scenarios will be introduced and mock role-playing of MET meetings will guide the development of staff understanding and implementation of the process. Teachers and instructional staff will meet regularly with team leads and school administration to discuss student needs, with referrals to the MET occurring on an on-going basis. Our Thursday afternoon staff meetings are designed for these meetings. Once school begins, the MET will meet once or twice monthly with more frequent meetings dictated by student need and referrals.

The effectiveness of the Response to Intervention model for all students, and particularly for students who are performing below grade level, is described in detail in section 2b above.

5. Identifying and meeting the needs of intellectually gifted students

The instructional design of The Green School is intentional in its benefit to all students. The flexibility of project 'terms' and design allow modification by a teacher and alignment to all learning styles, educational needs, and outcomes. The 'service plan' is unique to each child. Thus, in addition to providing support at the individual level for students who have learning challenges, the RtI strategies as described in section 2b above will also be an effective model to enhance abilities of intellectually gifted students.

a. Evidence-based instructional programs, practices, and strategies

TGS intends to use an inclusionary model, thus meeting the needs of all types of learners in each classroom. Our curriculum and instruction is based on educational models that enhance the learning environment for gifted students. The integration of the arts through Waldorf methodology, using multiple strategies of instruction, an integrated curriculum, as well as *Readers/Writers Workshop* are all research-based practices that are effective strategies for working with gifted students (Davis & Rimm, 2004). Our EfS program will provide opportunities for gifted children to learn deeply the theories and practices of environmental sustainability. Furthermore, many identified gifted students often have a strong sense of social justice and will benefit from their involvement in community service projects.

b. Providing qualified staffing for intellectually gifted students

Our Education Director, Dr. Mary Goral, has an endorsement in Gifted and Talented Instruction. She spent two years teaching in self-contained gifted classrooms in Monroe County. Dr. Goral will

provide strong leadership, mentoring, and staff development for all teachers and will ensure they are meeting the needs of the gifted students in their classrooms. TGS will also have a full-time special educator who will assist with students who have special gifts and talents. Finally, the school plans to contract with the Institute for School Excellence (ISE) to meet the needs of any exceptionalities (including gifted) that TGS is not equipped or trained to handle. ISE will provide special education direct and related service contractors to meet the school's needs and to guide special education compliance once the school charter is approved. We have begun conversations with Michelle Thompson, executive director of ISE and will further explore this partnership once our charter is approved.

c. Assessing and monitoring the progress and success of intellectually gifted students

All students at TGS will participate in the required standardized testing and teachers will continually monitor the progress of students through formative and summative curriculum-based measures. Teachers will continuously monitor the progress of all students, including those with identified special needs (which includes gifted) and twice monthly teachers will meet in their Critical Friends Group to discuss student achievement.

Student Recruitment and Enrollment

1. Student recruitment and marketing

The Green School will have an aggressive marketing strategy to recruit students. We will host open houses every two weeks at public libraries in Monroe and surrounding counties. We will also recruit and hold informational meetings at the Monroe County United Ministries; the Monroe County Head Start programs; the Middleway House for battered and abused woman and children; and several day-care facilities in Monroe and surrounding counties.

The Bloomington Project School will announce the opening of TGS to over 200 waitlisted students and will host an open house for those families at BPS. We will have Public Service Announcements on local media and expect to be invited to talk about the new school on multiple local radio programs and by the local newspapers.

2. Enrollment Policy. See Attachment 11.

Student Discipline

1. Philosophy of student discipline

We believe in using positive behavior intervention that focuses on intrinsic, rather than extrinsic, rewards. The heart of this process is self-reflection on the part of everyone involved. Students need to know how their actions affect who they are, their success, their ability to contribute positively to community, and their impact on everyone around them. If a student is having difficulty following school and/or classroom expectations, it is our responsibility to find out why. This begins with the Waldorf approach of teacher self-reflection in regards to a teacher's role in student performance, whether academic or behavioral. This teacher self-reflection process is supported by the respectful, caring mutual student-teacher relationship developed over the course of time as a result of looping (for a description of grade looping, see **Basic Learning Environment/Class Size and Structure** at beginning of **Section II**). Then, through a series of steps, we work with the student to make better choices. (See **Attachments 7 and 12.**) If a student's actions inflict physical and/or emotional harm on another child or adult, suspension will be considered.

Incident reports will be recorded and filed in accordance with Indiana Department of Education regulations and State Legislation. The School Leader will be responsible for seeing that all requirements are met.

Our complete discipline policy and procedures will be outlined in a section of the student/family handbook, which will be distributed to teachers as they are hired, and to families before children attend school or when they enroll. TGS teachers design their own set of student and teacher expectations for their specific classrooms. This will be distributed to families. Specific classroom expectations will always be in alignment with the school expectations.

While the planned approach to discipline (**Attachment 12**) contains some specifics, it is a work in progress, needing to be fleshed out as we plan for the opening of TGS.

2. School Discipline Policy. See Attachment 12.

Parents & Community

1. Other school options in the targeted location

Elementary Schools, Enrollment by Grade

	IDOE Grade	K	1	2	3	4	5	6
Arlington Heights	C	40	41	45	57	43	41	45
Binford	A				113	142	117	130
Childs	A	58	64	53	66	80	67	68
Clear Creek	A	54	61	64	62	57	75	69
Clear Creek Christian School	n/a	16	11	17	17	9	8	6
Fairview	F	77	58	61	47	34	53	37
Grandview	C	58	54	53	61	64	64	77
Highland Park	F	47	70	54	46	38	48	52
Lakeview	A	66	66	70	70	70	68	63
Lighthouse Christian Academy	A	17	20	20	22	21	23	20
Marlin	C	27	39	31	38	35	33	39
Pinnacle School	n/a	1	2	10	9	6	12	10
Saint Charles Borromeo	A	47	39	43	32	44	45	42
Templeton	A	91	62	71	56	52	62	63
The Bloomington Project School	A	22	35	34	36	23	28	35
Rogers	A	98	121	123				
Summit	C	77	76	68	68	70	72	62
Unionville	A	33	39	36	35	43	24	44
University	A	75	60	58	50	75	80	75

Middle Schools, Enrollment by Grade

School	IDOE Grade	7	8
Batchelor Middle School	B	255	271
Lighthouse Christian Academy	A	14	14

Saint Charles Borromeo School	A	41	46
Jackson Creek Middle School	A	270	279
The Bloomington Project School	A	33	23
Tri-North Middle School	A	292	297

In the Bloomington community, private schools and the charter school hundreds of students on their waitlists annually. The administrators at the local charter school, The Bloomington Project School, are willing to share their waitlist contacts so we can initiate open houses in the early phases of student recruitment. Other alternative schools in Bloomington, including Pinnacle School, Clear Creek Christian School, St. Charles Borromeo School, and Lighthouse Christian School, also carry waitlists annually, indicating the overall desire for alternative school choices in our community.

2. Unique or compelling qualities about the proposed school

The Green School will be unique because we will offer holistic methods with EfS, every day, year round. Students in the community at large may receive this kind of schooling on a sporadic basis, in a special convocation, or if they have a teacher dedicated to using progressive methods, but they do not receive the kind of focus and attention to detail in holistic education that our model will provide on a consistent basis. Families in the community are enthusiastic about our school model. Parents have sought out our group to ask how they can support our efforts to form the new school. For this reason, we started the The Green School email distribution list and we maintain contact through our Facebook page and website. We have gauged community support for TGS through a community interest survey along with a series of public open houses. In addition, we are currently embarking on a new outreach plan designed to increase community awareness about our specific platform and methods. Our “Community Outreach Series” begins in March 2014 (see **Attachment 13** for a description of our community engagement).

3. Parent engagement and family-school partnerships

Parents and families have been engaged from the initial formation of TGS and because of their foundational role in the success of students, will continue to be through implementation, opening, and the long-term. Part-time administrative positions will assist in the development and preservation of family-school relationships that are necessary to the success of students and our school. Our Community Outreach Coordinator (COC) will be responsible for making contact with and continuing ongoing communication with partnering organizations along with facilitating communication with families at the school. The Life Skills Educator (LSE) will play a direct role in overseeing student needs and communicating with families to facilitate those needs being met, while the COC will assist with coordination of family oriented events such as the coffee hour. The two will also work to link the administration to the Parent Volunteer Network (PVN). The PVN, made up of a group of parent volunteers, is analogous to a traditional PTO. They will organize school fundraisers, oversee planning and running of seasonal festivals, and maintain a lending library of educational and community resources. The TGS Founders will initiate proactive recruitment (and volunteer help) from parents who are interested in applying to TGS when the school is approved. Volunteers will assist with tasks such as securing and preparing venues for outreach events, sharing literature about our model, greeting community members and providing refreshments, and will automatically be eligible for the PVN if/when their student is accepted to TGS. Though PVN recruitment may continue into the opening of the school, this process will increase the possibility of a fully functioning PVN by the opening date and will initiate immediate support for faculty, staff, and new parents coming into the TGS system. We will solicit additional parent volunteer support in the school gardens, classrooms, at festivals, as food service or cafeteria volunteers, or for intramural sports.

Families are an important network that feed a school, so we will bolster that network from the start. Throughout implementation, interested parents and community members can visit our website to gather information on our philosophy and the status of school-related events such as outreach events, and meetings. In addition, our email distribution list will keep communication current with prospective families while helping our Founders Group keep track of interested parties. Literature will be posted in appropriate venues and shared with partnering organizations when applicable. We will offer open houses or outreach events every two weeks to share our mission with the public.

We recognize the demands that society places on families; dual worker households, busy schedules, and tough economic times are sources of stress for contemporary families. School schedules and responsibilities can add to the load. We want to support families in raising healthy, confident children. Therefore, it is important to us that families feel comfortable at our school, and family-school partnerships and support for learning will be strengthened through high communication standards and expectations between administrative staff, teachers, and parents. A benefit of a small school is that staff will recognize each student and know each student's parents. An open door communication policy between teachers, families, and administration will increase accessibility of teachers and administrators for parents. We will also connect with parents by implementing two conferences with teachers, along with an annual home visit. Unlike the traditional model of switching classrooms annually, the looping concept allows more time for teachers and parents to nurture relationships and develop strategies for helping students succeed.

We will welcome families to school with a "Harvest Festival" each fall and gather as a school community for seasonal events or festivals. Our COC and LSE will publish a monthly school newsletter to inform parents about school-wide events, community events, tips for raising healthy families, updates on school projects, and tips for academic support at home. Other forms of ongoing community building include an email distribution list monitored by staff and a school website. The Center for Sustainable Living, one of our community partners, will co-design and lead EfS programs offered to school families to provide continuing education for parents who want to learn more about sustainability. Last, staff and teachers will implement a volunteer "friend family" and "class buddy" system to facilitate the transition of new students into the school community during the academic year. This buddy system will work in conjunction with an orientation; both will serve to introduce new families to our school and help them adjust by providing them a source for answers to their questions.

4. Community resources and partnerships benefiting students and parents

Because TGS emphasizes community building, the community resources available to students and parents will be abundant. Our community offers numerous services to support families including but not limited to:

- Homework help: The Boys & Girls Club, Monroe County Public Library, Girls Inc, Big Brothers Big Sisters
- Support for Latino community: El Central Comunal Latino
- Medical Assistance: Volunteers in Medicine
- Free Meals and/or Groceries: MHC Food Pantry, Community Kitchen, Monroe County United Ministries, Women Infants & Children
- Energy Assistance: South Central Community Action Program
- Health and Wellness, Family Programming, and/or Parenting Education: Monroe County Public Library, IU Health Bloomington Community Health Education, Bloomington Area Birth Services

Though these organizations are not affiliated with our school, they illustrate the community capacity and support offered in the Bloomington community.

Community partnerships within our school are numerous and varied. The table presented in the Executive Summary highlighted all established and potential community partnerships and resources discussed to date. The following list further details some key established partnerships and resource entities. See **Attachment 13** for letters of support and commitment from community partners.

The Center for Sustainable Living (CSL) commits to participate in the design and implementation of EfS classes, as well as promoting school and community-wide events that provide sustainability education. Examples of classes may include information on benefits of using local goods and services, home installation of solar energy, or bicycle repair. This is an in-kind, yet reciprocal, commitment.

Indiana University Service Learning Program (IUSLP) provides service to the community at large by matching university classes with community organizations and providing the organization with instrumental services while educating college students with practical field experience. There are no fees associated with this relationship. IUSLP may provide direct service for volunteer areas such as the school garden and school aftercare, or assist with marketing and technical service needs, or participatory research and training.

The Boys & Girls Club commits to provide community service opportunities to students at TGS in support of service learning for social justice. In addition, the Boys & Girls Club will share community resource announcements with TGS to inform school families about community resources, including afterschool and summer programs.

Mother Hubbard's Cupboard Food Pantry will provide volunteer opportunities that result in sustainability and social justice learning. MHC welcomes the potential for a new pool of volunteers since most of their services require volunteer work. There are no fees associated with this relationship.

In addition to the service learning component of EfS, students will be encouraged to participate in activities that foster community building, social justice, and environmental sustainability so they can be involved with their community in a meaningful way. We will offer activities that promote environmental sustainability, individual health and wellness, and social justice. Examples include arts programs, walks or bike rides to support a charitable cause, and Habitat for Humanity youth building programs. We will encourage students to become involved in the community so they can experience working collectively, and learn the value that each individual brings to a community.

5. Evidence of community support. See Attachment 13.

Performance Management

1. Student goals expected at the end of five years

In addition to the ICSB Accountability System, 80% of our students will be at or above grade level in mathematics and language arts at the end of each three-year looping arrangement. This will be measured by using the NWEA test.

Performance Indicators: The students will demonstrate growth when compared to the national norms set by NWEA.

Assessment Tools: Students will generate baseline data utilizing NWEA testing software at the beginning of the school year. Students will complete an end of year test utilizing NWEA testing software that will enable a comparison between the baseline data and end of year data.

Assessment Reliability and Scoring Consistency: NWEA has proven to be a successful way to measure student performance.

Artistic Goals: After being at our school for three years, we expect our students to gain proficiency in the fine arts, including singing, playing an instrument, painting and drawing.

Measures and Assessments for Above Goals. Students perform for the parent and student body a minimum of four times a year. These performances include singing, displays of student artwork (both fine and practical), and as well as class plays. Although students will not be given letter grades for their artistic work, they will be evaluated through their performances and art displays in written narratives and conferences with parents. Every year teachers have conferences with parents in the spring and the fall, and compose extensive written reports that discuss not only the student's academic progress, but their social and emotional well-being. The third written report is an even more conclusive year-end evaluation. At the end of each three-year looping arrangement, teachers will evaluate students on the above goals to determine whether or not students have successfully achieved these goals.

Affective Goals: In addition to the above cognitive and artistic goals, TGS also has **affective** goals for our students (see **Appendix B** for TGS' Core Beliefs). At TGS the relationship between a teacher and a student is a very strong one, partially because of the three-year looping arrangement, but also because of our mission, vision, and core beliefs. As a result, our teachers are able to assess the day-to-day growth and achievements of each student in a deep and comprehensive manner.

Measures and Assessments for Above Goal. In order to measure the unique goals we have for our students we intend to use the Circle of Courage model (<http://www.reclaiming.com/content/about-circle-of-courage>), which identifies four universal growth needs for children. These include Belonging, Mastery, Independence, and Generosity. These concepts will be presented to teachers as part of their professional development. At the end of each three-year looping arrangement, teachers will evaluate students to determine whether or not students have successfully achieved these goals.

Capstone Goal: Finally, we expect our students to leave eighth grade as fully prepared to succeed in a rigorous high school program.

Measures and Assessments for Above Goal. All eighth grade students will participate and complete a capstone service learning project, centered on a subject of their choosing. The project, which will require substantial research and writing, will involve a hands-on component and will be guided by an outside mentor who is experienced in the field of study. Each student will produce a project implementation plan or portfolio of work and be required to present it to the school and larger community.

2. Primary interim assessments the school will use to assess student learning

Assessment at TGS will span the entire curricular framework. Some assessments will be teacher created and very specific to a unit of study while others will be components of a purchased curriculum. Regardless of the type of assessment, or which element of the curriculum it is addressing, the intent will remain the same: to provide multiple opportunities for teachers and students to reflect, to provide feedback on authentic work, and to inform the instructional decisions

of the faculty. Assessment will be used to monitor student progress continuously. The forms of assessment listed are directly linked to the body of research that supports our curricular decisions, as well as our core beliefs about how students learn best.

Assessment Components and Schedule for Administration

- **Literacy Assessments**
 - conferences and other anecdotal data (daily)
 - Running Records (weekly for primary/ less frequently for older, self-extending students)
 - Benchmark Assessment System (BAS) to assess all readers K-3 and those who will benefit from this tool as a method to inform instruction in 4-8 (at least bi-annually) letter/sound assessments (K-1, bi-annually)
 - sight word assessments (K-3, ongoing)
 - end of unit assessments
- **Writing Assessments**
 - conferences and other anecdotal data (daily)
 - on demand writing samples are compared to the Teachers College Writing Continuum (pre- and post-unit)
 - word study assessments
 - classroom and unit specific rubrics
- **Math/Logical Assessments**
 - Bridges assessments (pre and post assessments every unit)
 - College Preparatory Math assessments, anecdotal records (on-going)
 - Advantage Math Assessment (K-1 plus 2-3 if needed, bi-annually)
- **The Daily Lesson Book**
 - formal and informal teacher created assessments (as needed)
 - co-constructed instructional rubrics (quarterly)
 - anecdotal records (on-going)
 - end of unit assessments
- **Intensives Assessment**—formal and informal review (three times a year)
 - IREAD-3 (spring)
 - IREAD K, 1, 2 (spring)
 - ISTAR (spring)

This multifaceted approach to assessment was designed to ensure that our teachers will have reliable, authentic, qualitative, quantitative, and real-time data to make curricular and instructional decisions. The most powerful tool a teacher has in addressing the needs of students is the information from multiple assessments. Success on these common assessments will also help to confirm that the expectations of the state are being met through the meaningful, rigorous, and relevant curriculum and instruction that has been designed and is being implemented.

3. Collecting and analyzing student academic achievement data

Learning progress will be regularly reported to parents and, as appropriate, to the students themselves. Three progress reports in narrative form with notations will be disseminated to parents/guardians during the course of the school year. These reports will document student progress in relation to the specific State Standards and Common Core Standards as they align to the curriculum. At the end of each year, teachers will provide parents with an extensive, criterion-based written report detailing the student's level of success. These reports will be accompanied by

assessment rubrics so parents receive both a quantitative and qualitative measure of their child's development.

The Co-Director along with Daniel Baron, one of our community partners, will be responsible for collecting and analyzing student achievement data, interpreting it for classroom teachers, and leading/coordinating professional development to improve student achievement. The state mandated tests in language arts, mathematics, and other mandated subjects will be administered annually, in compliance with federal and state requirements. Since individual results on this assessment will be reported back as student performance levels, TGS will use this data to identify students' proficiency on grade-level standards. TGS teachers and instructional leaders will then be better equipped to make key decisions regarding individual students, as well as school-wide programs and courses. The data will be used in tandem with other evidence from our multiple assessment programs to design appropriate support systems for students who need supportive instruction, remediation, or enrichment. Results from state achievement tests will also be used to set academic goals for individual students and the school as a whole.

TGS will utilize the following mechanisms to ensure that the proposed school will be accountable to parents and the school community for the students' success:

- Parents and the school community will be regularly updated regarding the philosophy and process of assessment. Specifically, information on how students are progressing toward their goals will be shared on a quarterly and annual basis via progress reports, report cards, newsletters, meetings, and school accountability reports.
- Parents will participate in conferences at which the teacher will share student portfolios and other accomplishments.
- Student assessment will be ongoing and used to determine levels of student achievement throughout the school. Assessment data will be analyzed in a timely manner, enabling staff to identify areas that need strengthening and plan how to improve instructional programs and student support. New goals and priorities then will be set based upon assessed student needs.
- School assessment will measure and track the school's progress toward its goals. Assessment results will be used to determine program adjustments needed. Data collected will provide information to parents, the community, and the Governing Board regarding the performance and progress of the school. TGS will make every effort to provide all stakeholders, especially parents, with opportunities to be part of the educational planning and implementation stages of the development of the school.

4. Information system the school will use to manage student performance data

TGS plans to use CSMC and PowerSchool to manage our student performance data. The Co-Director will work closely with CSMC to interpret the data for classroom teachers, as well as lead professional development sessions (with Daniel Baron) where teachers will work together in Critical Friends Groups to improve student achievement.

5. Training and support for analyzing, interpreting, and using performance data

The Co-Director will train the staff in the interpretation of all data collected from assessments throughout the school year. We will also hire Daniel Baron as a consultant to meet twice monthly with our faculty to work collaboratively at assessing work, interpreting student work in the context of necessary interventions for student academic improvement, analyzing student academic test

data, and leading conversations about relevant professional texts on student academic performance.

6. Corrective actions the school will take

The founders of The Green School are committed to students achieving academic success. This is a fundamental reason why these educators came together to create a school. According to the research in **Section 1** of this proposal, we fully expect our curriculum and instructional strategies to produce great results. However, if at any time the data supports evidence that the proposed curriculum or instruction is not effective, we will take immediate action to correct it. The School Director will convene a school improvement committee composed of administrators, teachers, parents, and board members to develop a plan of action to place the school on for improvement.

SECTION III: IMPLEMENTATION PLAN

Human Capital

School Staffing and Structure. See **Attachment 14**.

School Leadership and Staff Hiring, Management and Evaluation

1. Strategy and Timeline for recruiting and hiring teachers

All teaching staff will meet the Highly Qualified (HQ) criteria in accordance with IC 20-24-6 and the state certification requirements prior to employment. If the most qualified candidate for an area of employment need does not meet the HQ criteria but does hold a current teaching license in the state of Indiana in a relevant teaching area, a temporary/emergency license will be explored and, when appropriate, secured. Any teacher on an emergency license will be expected to work toward the license in the first year in the position. Six credit hours per year will be secured to maintain the emergency license for the following year. Certification must be reached within three years of beginning the position under the emergency license. Teachers must complete the transition to teaching program after 3 years of teaching at the charter school. Both full and part-time teachers must have earned a 3.0 GPA and a bachelors degree.

In addition to the HQ requirements, we believe that selecting staff is the most important decision in ensuring success for all students and the life of the school. All of our teachers will participate in our professional development plan prior to hiring. See the chart in the **Schedule and explanation of professional development** answer in the **Professional Development** section below.

Currently, we have a number of teachers from around the country who have expressed interest in our school. We feel confident that we will be able to recruit the needed faculty. Several avenues exist for advertising, including Indiana University School of Education, The Chronicle of Higher Education, local employment resources, and www.allianceforpublicwaldorfeducation.org. We will also recruit from a group of public school teachers who are members of The Waldorf-inspired Cadre, located in Louisville, KY. Once we have received our charter, we will actively begin recruiting teachers. Our intention is to have all teachers hired by June 1, 2015 so that we can have everyone present for staff development prior to the start of school.

We will conduct a careful review of each application, looking for a candidate's alignment with our core beliefs, mission, and vision. We will invite our team of founders to interview all potential candidates. For each prospective and qualified candidate, we will:

1. Conduct a phone interview
2. Conduct a personal interview
3. Request a teaching tape

4. Request the candidate teach a lesson
5. Carefully review the candidate's references (at least three)

We will also ask for copies of certifications and transcripts, and will confirm certification with the state of Indiana. All employees will be required to provide information needed to conduct a criminal background check.

2. Staffing Plan

The Governing Board has the ultimate authority over the fiduciary, legal and quality of educational programs for the school. The Board will delegate operational responsibilities primarily to the Education Director and financial operations to the Co-Director and CSMC. The Community Engagement Coordinator and Life Skills Educator will report to both the Education Director and Co-Director. The teaching staff are responsible for teaching their classes and report directly to the Education Director. Teachers' aids will report to the teachers and ultimately to the Education Director. All non-teaching staff will report to the Co-Director.

During the course of our planning year, all teachers will engage in extensive professional development specifically aligned with our curriculum, pedagogy, and school culture. The primary responsibility for excellent teaching rests with the classroom teacher and her colleagues who serve as critical friends, under the supervision of the Education Director.

We plan to implement an innovative career ladder whereby instructional assistants, with teaching certification, who have demonstrated the capacity to become full-time teachers will be elevated to an intern status. As interns, their pay will increase significantly and their hours will be the same as full-time teachers. The aides will take on more responsibility, view themselves in a co-teaching role, and gain practicum-type experience of ultimately becoming full-time teachers. Teacher interns will have first priority for any full-time certified classroom teaching positions.

Finally, our entire staff (administrative, teachers, support) will be involved in the planning, teaching, modeling, and delivery of our Education for Sustainability program. All staff members will have the opportunity to offer six-week classes in an area of environmental sustainability or social justice that they are passionate about. This provides students the opportunity to learn from a variety of perspectives and experiences, and builds community cohesiveness.

3. Evaluation of School Leader and teachers

The School Project Foundation has helped many districts on their evaluation systems for school leaders. SPF will work with our Governing Board to develop a school leader evaluation process that evaluates both current best practices for school principals and the academic performance of our students; they will create an evaluation tool that is grounded in our school's mission and vision. The Director will also be evaluated on the academic and fiscal success of the school. Evaluation tools will be developed during the planning year.

The Education Director will be evaluated yearly, and will also be asked to compile a yearly self-evaluation based on her annual professional goals (see **Appendix E** for one such self-evaluation tool). Finally, given the collaborative nature of the school community, the Education Director will freely seek feedback from other administrators, faculty, staff, and parents on a continual basis.

As part of an employee retention plan and to ensure continuous improvement in overall school quality, the school will philosophically and financially support faculty, staff, and administrative personnel in their continuing education and professional development. TGS views teachers as lifelong learners and believes that effective professional development is systemic, sustained,

reflective, and supportive of standards implementation, and therefore, the Education Director will devise a professional development strategic plan with specifically-targeted goals and objectives for each faculty member.

All certified teachers will be observed/evaluated multiple times by the Education Director (superintendent). Evaluations will be informed by student achievement and growth. Our evaluation system will be tied to our school's vision and mission and will follow the guidance of the DOE teacher evaluation and compensation plans (see **Appendix F** for School's Compensation System and Performance Evaluation Process). A fully developed evaluation plan will be developed by the Education Director and school's founders upon approval of our charter. We will either develop our own plan, as stated above or will adopt one of the following three plans: Master Teachers, the System for Teacher and Student Advancement (TAP), or the Peer Assistant and Review Evaluation System. If we decide to create our own plan, all three of these systems will inform our final evaluation/compensation plan.

4. Unsatisfactory performance, changes and turnover in leadership/teachers

If the Education Director becomes aware of any teacher's or leader's unsatisfactory performance, she will immediately schedule a conference with that employee. She will have a conversation about the concern and collaboratively develop an improvement plan. Once the plan is established, the Education Director will make frequent, unscheduled observations. The Education Director will meet with the employee twice monthly to assess and review improvement performance and level of achievement of the goals. If after six weeks there is no significant improvement the employee will be put on notice of termination. We will maintain a balance of the school's responsibilities to safeguard employee rights while maintaining the greatest commitment to the welfare of the children. If an employee does leave, we will use our hiring process for turnover. We expect to have many more applicants for positions than we have openings, so candidates will be ranked, and files kept. If we have identified qualified teacher interns, they will have top priority for filling a teaching vacancy.

5. Overview of school's compensation system

All full-time teachers will receive insurance and retirement benefits, including TRF or PERF. Insurance and retirement benefits are equivalent to approximately 28% of their salary. We will initially follow the Monroe County Community School Corporation's salary schedule, with an average teacher salary of \$36,000.00. We will have a step-program based on teacher experience and effectiveness and upon hiring, teachers will be granted up to five years of experience for teaching in other public schools. Based on IDOE's Model Salary Schedule, teachers could receive up to a \$1000.00 salary increase per year. Half of this increase will be based on evaluation results of teacher effectiveness. We will implement the evaluation process described above and use Indiana law IC§20--24--6--7 to guide our process of teacher evaluation/compensation.

Professional Development

1. Support of school leaders

We will support our Education Director and Co-Director by offering leadership opportunities through courses and professional development in order to continually improve their leadership skills and to encourage life-long learning. The Education Director and Co-Director will receive support from school partners at the School Project Foundation (see community partners) and from university partnerships and liaisons. Mr. Daniel Baron, the Director of the School Project Foundation, has been providing professional support for school principals for over 25 years. He has provided school leadership professional development for school districts and major school reform

initiatives across the country. Mr. Baron wrote the *Instructional Leadership* column for the National Association of Secondary School Principals Journal, *Principal Leadership*, from 2006-2008.

Mr. Baron will be supporting the Education Director, Co-Director, and the leadership team one day each week during the planning phase and the first years of implementation. He will also provide professional development training to TGS staff in *Professional Learning Communities* (Critical Friends groups). Mr. Baron’s support will draw heavily from the highly acclaimed, *School Leadership that Works: From Research to Results*. He will support the School Director, Co-Director and the Governing Board to understand the 21 Responsibilities of the School Leader, Two Types of Change, Doing the Right Work, and co-creating a Plan for Leadership (Marzano, Walters, & McNalty, 2005.)

2. Schedule and explanation of professional development

Because we intend to hire highly qualified instructors with state teaching credentials, our professional development will deepen the education of our employees in the Waldorf approach of instruction and will also offer training in Education for Sustainability (EfS), *Readers/Writers Workshop*, our student discipline plan, Critical Friends, and RtI.

Dates	Course Title and Explanation
June 23 – July 3, 2014	Kentahten Teacher Training – Child Development and Teaching Language Arts using the Waldorf Approach. This two-week institute is available for teachers interested in applying to TGS.
November 6-9, 2014	Kentahten Teacher Training - Teachers continue their study of the theory behind the practice of the arts and the development of the child. This long weekend course is available for teachers interested in applying to TGS.
March 5-8, 2015	The EfS Curriculum: Teachers will be introduced to the EfS Curriculum and standards.
June 8, 2015	By this time all school personnel should be hired. This day will be devoted to introductions of staff and a school work day to build community.
June 22 – July 3, 2015	Kentahten Teacher Training – Teaching Mathematics using the Waldorf Approach, Integrating the Arts into the Academics, Critical Friends Training, and <i>Readers/Writers Workshop</i> .
July 29 – 31, 2015	This three-day workshop will be a compilation of trainings necessary for school personnel to become familiar with the day-to-day operations of the school, including opening day routine, scheduling, buses/transportation, CPR training, the discipline plan, insurance/benefits, Critical Friends Training, assessment practices, and parent/community involvement.
Summer 2015	Two teachers will attend a Responsive Classroom workshop which teaches them the school discipline program.
Summer 2015	Our CEC will attend training for Education for Sustainability at Shelbourne Farms or the Cloud Institute.
Spring and Summer 2015	Our handwork teacher will continue training at Sunbridge College.

3. Expected number of days/hours for professional development

Teachers begin their school year with three PD days devoted to a compilation of trainings necessary for school personnel to become familiar with the day-to-day operations of the school. By the end of the first quarter, we will have a day dedicated to individual and collaborative goal-setting for all academic and administrative personnel. During the second, third, and fourth terms we will have school-wide retreats (3 total), dedicated to professional activity with particular emphasis on areas

of need that have been identified. At the end of the school year, we will have 3 days to reflect, evaluate and look forward with plans for the following school year. Our staffing plan includes a weekly early release on Thursday (1:30pm) and teachers, administrators, and staff will meet from 1:45 – 5:00pm. These days are dedicated to collaborative work and professional development. Our Critical Friends Groups (CFG) will review assessment data twice a month. The CFGs agenda is determined by student need as assessed in the most recent collection of student data. All founding faculty members will receive *Critical Friends Coaches* training (a powerful professional learning community model) prior to the opening of the school (see PD chart above). The training will focus on learning the tools and processes for making meaning out of academic data, looking collaboratively and critically at student work that does not meet standards, and working together to help each teacher revise lesson planning, instructional strategies, and assessments to improve student achievement. Daniel Baron, a leading national expert in training and facilitating professional learning communities, will lead two faculty meetings per month providing ongoing professional development in collaboratively assessing work, interpreting student work in the context of necessary interventions for student academic improvement, analyzing student academic test data, and leading conversations about relevant professional texts on student academic performance.

4. Evaluating the professional development program

Professional Development is embedded into the structure of the school week. The Green School teachers will only be hired if they have demonstrated the habit of life-long learning. The faculty will regularly assess and revise when necessary the on-going professional development of the school. Ultimately, the final assessment of our professional development will be reflective of the higher achievement of each student. If we find emergent gaps in student learning, our professional development plan will be revised to fill that gap.

Start-Up & Operations

1. Start-up Plan. See Attachment 15.

2. Start-Up Staffing and Costs. See Attachment 17.

3. Transportation arrangements for prospective students

TGS's plan for transporting students to and from school is based on the assumption that the school will be located south of the city. We will use all forms of public transportation and are committed to eliminating all transportation obstacles for students who reside in Monroe and surrounding counties. In close collaboration with TGS faculty, TGS's School Advisory Team will develop a transportation support system to ensure that all children who are enrolled in the school, including those that are homeless, and cannot provide their own transportation, will be able to attend school daily. The school is reserving funds to ensure access for each student. TGS will work closely with the City of Bloomington's Department of Transportation and the county's rural transit system to provide transportation to the school. If needed, we plan to contract transportation services in year one; our long-term vision is to acquire our own buses and to have qualified drivers. Any student with transportation needs based on their Individual Education Plan will be guaranteed those accommodations outlined in the IEP.

We will focus a portion of our grant writing to cover transportation costs for field trips and athletic events once our school has established an athletic program.

TGS leadership team and its Governing Board will prepare a more detailed description of transportation services once the needs of our families are known.

4. Safety and Security

- The building will be equipped with a complete security system that monitors all external doors and contains motion detectors.
- All doors, except for the main entrance, will be secured (locked with appropriate signage)
- The main entrance will serve as the only access point during the school day. All who enter will proceed to the front desk staff for sign-in, identification check if appropriate, and a nametag.
- Entry after the front desk closes each day will occur through a phone call to a staff member.
- A sign-in sheet for staff working outside of typical school times will be kept at the alarm keypad.
- The closing procedure will include announcing departure, checking the security of every external door, sweeping all spaces, and setting the alarm.

Safety procedures will be taught to all students and staff to ensure smooth implementation in the case of an emergency.

5. Technology Specifications and Requirements (for Virtual Operators only). N/A

6. Insurance Coverage. See Attachment 16.

Facility Plan

1. Plan for identifying a target location. N/A

2. Facility Description.

The property we have identified is located at 2200 West Sunstone Dr., Bloomington, IN 47403. Currently, it is used as the headquarters for Cassidy Electric Company (see **Appendix G** for the floor plan). This property includes a restored 7,500 square foot limestone commercial building situated on 5 acres. Additionally, this property is part of a larger development called Woolery Mills, which is a mixed-use development featuring single family homes, condominiums, apartments, and retail sites. A significant appeal to this site is its proximity to I-69. While it is 10 minutes from downtown Bloomington, it is also less than 25 minutes from three surrounding counties (Green, Lawrence and Morgan which includes the cities of Bedford, Bloomfield and Martinsville).

Ron Walker, former President of Bloomington Economic Development Corporation, has written that he is:

excited about the proposed siting of the school at the Woolery Stone Mill. This site has been pre-approved for tax abatement, is near a recently improved multi-use trail system, natural areas, a city park, and residential neighborhoods. As well, the Woolery Stone Mill is within a Tax Increment Finance (TIF) area, an economic development tool that enables public infrastructure improvements. The TIF was recently utilized to improve the multi-use trail and bridge on W. Tapp Road, and add a new side path. These investments improve the area's ability to more safely accommodate pedestrians, bicyclists and automobile users.

We believe The Green School will only improve the Woolery Stone Mill area and may lead to other complementary investments adjacent and proximate to the site.

An educated citizenry and a talented workforce are the two most critical issues influencing a community's economic vitality and quality of life. In a short time, The Project School (Bloomington's only other charter school) has already benefitted the community by offering

a new, progressive and effective education alternative. We believe The Green School will further benefit our region by strengthening our community's ability to retain and attract the talented workers and leaders who will help us develop a vital, sustainable and competitive economy well into the future.

We project that the cost to complete The Green School Campus will be approximately 2.1 million dollars. The initial site cost will be \$875,000. This price includes the building located at 2200 West Sunstone Dr., which sits on two acres, plus 3 additional acres that we will use to build a playground, parking lot, and an additional building. The infrastructure and excavation are expected to cost no more than \$150,000. The conversion of the existing building from an office building to a school should cost no more than \$125,000.

We anticipate that a newly constructed steel frame building will cost no more than \$1,000,000. As we plan for this new structure, we project that it will have a footprint equal to 10,000 square feet, with a height of no less than 30 feet for future vertical expansion. Due to the natural slope that occurs on the west side of the property, an additional 10,000 square feet of walk out on the lower level will be gained. The new structure will have a total volume of over 30,000 square feet with 7,500 – 10,000 square feet dedicated to recreation, dining, and assembly. There will be seven new classrooms and four new and renovated bathrooms. The rest of the space will be used for future expansion. We anticipate fully complying with the American Disabilities act as it pertains to school facilities.

See **Appendix H** for an estimated budget for the construction. The cost of the purchase and construction are figured into the facilities costs in the budget.

Finally, we have contacted Todd Hite at the Indiana State Department of Health, Health Care Engineering Section and sent all of the requisite material to arrange a site visit.

Budget & Finance

1. System for managing accounting, purchasing, payroll, and annual audit

We will contract with CSMC for the majority of the school's fiscal process (See www.csmci.com for a complete description of CSMCs services and the fiscal processes they provide). The Co-Director and front office support will be responsible for the school's internal controls. CSMC will support our annual audit, however, we will hire an outside firm to conduct the audit. TGS will contract with Paybridge (www.paybridgeusa.com) for our payroll process.

2. 5-Year Budget. See Attachment 17.

3. Budget Narrative. See Attachment 18.

4. Additional Requirement for Pre-Existing Non-Profit Organizations. N/A

SECTION IV: INNOVATION (IF APPLICABLE)

Foundations of Innovation

The Green School will be markedly different from any other school in our district, state and region. Our educational philosophy is built around sustainability and social justice, and is reflective of and

responsive to the changing needs of today's children. The full integration of the following four aspects is what makes TGS truly unique and innovative:

- **Arts-infused Curriculum and Pedagogy/Waldorf Education**
- **Education for Sustainability/Place-based Education**
- **Social Emotional Learning**
- **Green Building (Architecture as Pedagogy)**

Arts-infused Curriculum and Pedagogy/ Waldorf Education

An art-infused curriculum, inspired by methods used in Waldorf education, will be integral to our school. The deep integration of the arts will be found everywhere in the curriculum, as art will not be taught in isolation. Students will draw during every morning lesson. They will paint using watercolors at least once a week. Handwork and modeling will also be integrated into the academics weekly. For example, students will learn the Pythagorean Theorem by first drawing it (see **Appendix I** for a sample of such a drawing). Research supports the idea; as Petrash points out, "The teaching of any subject, from science to history, can be enlivened and enhanced by incorporating the arts into instruction (2002)." Sylvester (1998) found that evidence from evolutionary psychology and brain sciences suggests that the arts play a major role in brain maintenance and development. Furthermore, the arts serve as a great equalizer. They provide challenges and opportunities for students of varying cognitive abilities from all socioeconomic backgrounds.

The musical arts also will be present during every school day. Students will sing during the morning circle – learning academic content through songs. They will learn to play flutes (pentatonic in grades 1-3 and diatonic in grades 4-8), and string instruments starting in grade 4. Jensen (2000) believes the musical arts are central to learning. The systems nourished by music, including our integrated sensory, attentional, cognitive, emotional, and motor capacity processes, are the driving force behind all other learning. According to Weinberger (1998), "music has the ability to facilitate language acquisition, reading readiness, and general intellectual development, to foster positive attitudes and to lower truancy in middle and high school, to enhance creativity and to promote social development, personality adjustment, and self-worth" (p. 36). Music also gives buoyancy and lightness to the school day (Petrash, 2002).

The practical arts, including handwork and woodworking, will also be a part of the curriculum. Handwork (including knitting, cross stitch, crocheting, sewing, and embroidery) will be taught in all grades. Academically, knitting has been shown to positively affect children's reading (Williams, 2011). Woodworking will begin for students in fourth grade. Students will learn to make usable tools, such as wooden spoons when they are younger and furniture when they get older. The practical arts will give students a sense of purpose and an understanding of where material goods come from. Schwartz (1999) states "In an age when children are too often encouraged to become passive consumers... engaging in hand[i]work can be a powerful way of bringing meaning into a child's life" (p. 256). According to Mitchell and Livingston (1999), "Today's students need to be taught to activate their full capacities – to apply their thinking and to see the results. They are desperately in need of developing practical skills to build their self-confidence, self-reliance, and independence" (p. 65). Through their use and experience of raw materials, such as wood, wool, cotton and other fibers, students will gain a clear perspective of the natural world. A large amount of the content will be taught through storytelling. Goral and Gnadinger (2006) discuss the use of storytelling to teach difficult mathematical concepts to young children. In their research, they found that children make better sense of academic material when offered an image

(from a story) to attach to an abstract concept. According to Steiner (1997), young children live in their imagination, and because of this, our teaching should be delivered to them through images.

Movement will be integrated into the morning lesson on a daily basis and students will participate weekly in physical education classes. Brain-based research cites the use of movement in the teaching of academic subjects to be beneficial not only in relation to student engagement, but to student retention of material as well. According to Jensen (2005) the part of the brain (cerebellum) that processes movement, is the same part that processes learning. A study by Reynolds (in Jensen, 2005), found that students with special needs showed significant improvement in language arts and dexterity by participating in a movement program.

Education for Sustainability

The EfS program, organized around standards developed by the US Partnership for Education for Sustainable Development (http://www.uspartnership.org/main/view_archive/1), will be fundamental to the experience and culture of our school (see **Appendix J** for a complete set of USPESD Standards). These standards address the healthy development of students and fit our mission and vision seamlessly. Like math or language arts skills, EfS will be an ongoing curriculum that will build as the child grows. EfS includes focus areas of personal action, interconnectedness, ecological systems, social and cultural systems, and collective action.

EfS will be incorporated into the school's daily routine to form our cultural context, and will also be taught formally for forty-five minutes on four afternoons each week. Students will learn by design and by example, going beyond traditional learning mechanisms. Daily life activities and routines that involve sustainability and social justice will underscore the culture at our school so that overall practices will reinforce what we formally teach. Each lesson will be designed to be age appropriate. In the early to middle years (K-6), students will spend time observing nature, or participating in school-oriented projects such as planting gardens, restoring meadows, exploring and mapping the landscape, or supporting wildlife habitats. Sometimes these projects will be service-oriented. In the adolescent years (7-8), students will venture into the community for capstone service projects such as working in direct community service with local non-profit agencies. The EfS program will use a holistic approach that will continue through the grades, building perspective over each student's career. This process will help children to achieve a systematic view of sustainability and social justice issues, becoming a collective outlook infused with personal action.

When the school is approved, the Community Engagement Coordinator and Education Director will initiate a relationship with one or more organizations to support EfS curriculum and instructional design and to provide professional development opportunities. Funding will come from planning grant and/or implementation funds. Potential support-organizations include: The Cloud Institute for Sustainability (<http://cloudinstitute.org>), Shelburne Farms (<http://shelburnefarms.org/about>), The Community Works Institute (<http://www.communityworksinstitute.org/cwoutreach/cwprofdvlp/cwisummereast>), and The Center for Creative Change (<http://www.creativechange.net>).

Green Building (Architecture as Pedagogy)

"More than any other institution in modern society, education has a moral stake in the health, beauty, and integrity in the world our students will inherit" (Orr, 1999, p. 147). At the Green School, we will teach our students about environmental sustainability, but as important, the green school buildings will be a constant example of sustainability in practice for them. Through immersion and participation in our sustainable learning environments, students will learn, how to honor themselves, one another, and the planet.

Providing our students a sustainable, “green” school building will help the environment, but it will also help our students to achieve academic excellence. The Council of Educational Facility Planning International believes the conditions of school facilities might more strongly affect student performance than the combined influences of soci-economic status, family background, student behavior and school attendance (Guevera-Stone, 2003).

Social Emotional Learning

The Collaborative for Academic, Social, and Emotional Learning (CASEL) has identified five interrelated sets of cognitive, affective and behavioral competencies for students in the area of social emotional learning. The definitions of the five competencies are:

- **Self-awareness:** The ability to accurately recognize one’s emotions and thoughts and their influence on behavior. This includes accurately assessing one’s strengths and limitations and possessing a well-grounded sense of confidence and optimism.
- **Self-management:** The ability to regulate one’s emotions, thoughts, and behaviors effectively in different situations. This includes managing stress, controlling impulses, motivating oneself, and setting and working toward achieving personal and academic goals.
- **Social awareness:** The ability to take the perspective of and empathize with others from diverse backgrounds and cultures, to understand social and ethical norms for behavior, and to recognize family, school, and community resources and supports.
- **Relationship skills:** The ability to establish and maintain healthy and rewarding relationships with diverse individuals and groups. This includes communicating clearly, listening actively, cooperating, resisting inappropriate social pressure, negotiating conflict constructively, and seeking and offering help when needed.
- **Responsible decision making:** The ability to make constructive and respectful choices about personal behavior and social interactions based on consideration of ethical standards, safety concerns, social norms, the realistic evaluation of consequences of various actions, and the well-being of self and others.

Through our curriculum and pedagogy, students and teachers will naturally receive the benefits of a more holistic approach to schooling. According to Goral (2009) “Twenty-first century education cannot be effective, and public schools cannot thrive or even survive until certain conceptual implications rarely discussed in public schools are considered” (p. 117). Goral goes on to mention a number of educational researchers who promote social and emotional teaching, including Linda Lantieri (*School’s with Spirit*), Rachel Kessler (*The Soul of Education*), Parker Palmer (*The Courage to Teach*), Angeles Arrien (*The Way of the Teacher*), Daniel Goleman (*Emotional Intelligence*) and Nel Noddings (*The Challenge to Care in Schools*). Each of these educators believes that honoring the whole child, creating safe places where children can learn, envisioning classrooms as places of possibility, and teaching students to have honor and respect for themselves and the planet, all constitute a social and emotional approach to learning.

Description of Innovation(s)

Describe proposed innovation(s) in one or more of the following categories.

Teaching

TGS will use a developmentally appropriate curriculum rooted in the humanities. Academic subjects will be taught through the arts, and a deep honor and respect for the earth will be naturally integrated into all areas of the school program. An emphasis will be placed on teaching the “whole child” – head, hands and heart. Students will be taught subjects in units or blocks called the morning lesson. Besides learning traditional academic subjects and the fine arts, students will learn

the practical arts of handwork, woodworking, and gardening. Skill lessons in language arts and mathematics will round out the school day.

The morning lesson will begin the day's study. Students will study core subjects in depth during this block of time; an academic subject will normally be studied for three to four weeks. During the two-hour morning lesson, students will begin with the "morning circle," which will include movement, music, poetry and games, all focused on the academic subject at hand. Students will then review the previous day's content and will be introduced to new material. Following this, students will be given the opportunity to practice the material. They will finish the morning lesson by working in their morning books or listening to a story.

Each student will produce a morning lesson book for every block of study (see **Appendix D** for sample pages of a morning lesson book). What will begin as a blank journal will develop into an individual record of experiences, observations, and gained knowledge, along with hand-drawn illustrations, original poetry, and essays. The morning lesson book will serve as a portfolio of the student's work as well as the student's textbook.

During the morning lesson, a variety of teaching methodologies will be used to meet the needs of the various learning styles that will make up a classroom. For example, when fourth grade students study Indiana history and geography, they will experience the content through storytelling, music, movement, drama and art. Students will write and study prose and poetry about Indiana history, and use math to make their own maps of their classroom, neighborhood, school, and community. Everything will be studied is a piece of one whole.

Time

We will use an extended looping plan, where students will stay with the same teacher for grades 1-3, 4-6, and 7-8. This will allow us to capitalize on the relationships formed between teacher and students. Research shows that students who stay with the same teacher save as much as six weeks instructional time at the beginning of each school year.

We intend to use an extended calendar, beginning earlier in the summer and ending later in the spring. Our vacations will be spread throughout the year and we will have a shorter summer break. This type of schedule will allow for teachers to renew their energies on a more regular basis, which in turn will provide students with teachers who are working to the best of their potential. Students also seem to do better with more breaks during the school year and a shorter summer vacation. They will lose less content knowledge over the summer and will be more focused and engaged in their lessons at school. Furthermore, remediation will more effectively take place during the school year rather than during the traditional model of summer school. (Teixeira, 2004)

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Directorship/Fellowship

Presently <i>Bloomington, IN</i>	Executive Director of the School Project Foundation,
2008-Present <i>Bloomington, IN</i>	Co-School Leader of the Bloomington Project School,
2006-2008 <i>Bloomington, IN</i>	The Senior Fellow of the National School Reform Faculty,
2000-2006 <i>IN</i>	Co-Director of the National School Reform Faculty, <i>Bloomington, IN</i>
1992-2000	Director of Outreach Services, Harmony School Education Center, <i>Bloomington, IN</i>
1995-2000 <i>Bloomington, IN</i>	Director of the Schoolwide Intensive Partnership Program,
1995 -2000 <i>Bloomington, IN</i>	Director of the Indiana Title 1 Capacity Building Program,
1994-1995 <i>Bloomington, IN</i>	Director of the Indiana State School Transformation Project,
1993-1994	Director of the Indiana Total Learning Communities Network, <i>Bloomington, IN</i>

Consultant

Currently	District Transformation Consultant, <i>Burlington, VT</i>
2007-2010 <i>Indianapolis, IN</i>	District Transformation Coach MSD Decatur Township,
2001-2006	Lead Consultant, New Excellent Small Schools of Indianapolis Initiative, University of Indianapolis, <i>Indianapolis, IN</i>
2000-2006	Lead Consultant, Small Schools Coaches Collaborative (Bill and Melinda Gates Foundation), <i>Seattle, WA</i>
1999-2005	Lead Consultant, Lucent Technologies Foundation, Collaborative Learning Communities Project, <i>Murray Hill, NJ</i>
1998-2000	Lead Consultant for Professional Development, Atlas Learning Communities, <i>Newton, MA</i>

1997 Lead Consultant Atlas Communities Summer Institute,
Philadelphia, PA

1996-2000 Lead consultant to South Bend Peer Coaching Initiation,
South Bend, IN

1996 Consultant and Keynote Speaker for the Rhode Island
Breaking Ranks Initiative, *Providence, RI*

1995-96 Consultant to Panasonic Education Foundation, *Secausus, NJ*

1995-2000 Lead Consultant to the CVS Corporation Innovative Grants
Project, *Rye, NY*

1994-1998 Lead Consultant to the Davis Foundation, *Springfield, MA*

1994-2000 Lead Consultant to The Philanthropic Initiative, *Boston, MA*

1976-1980 Consultant in Evaluation to the Indian and Migrant Program
Division of the Department of Health, Education and Welfare, *Washington, DC*

Educator

1977-1994 Lead Teacher/Curriculum Coordinator, Harmony School,
Bloomington, IN

1977-1978 Associate Instructor, Indiana University, *Bloomington, IN*

1976-1977 Associate Instructor appointment at Indiana University,
Head Teacher at the University Nursery School Model Classroom, *Bloomington, IN*

1973-1976 Education Specialist for the Mississippi Bank of Choctaw
Indians, *Philadelphia, MS*

Awards

1993 Award of Excellence for Action Research, The Institute for
Educational Research

1990 Excellence in Teaching Award, Kappa Delta Phi

Education

May 1989 Specialist in Education, Curriculum Major, Indiana
University

June 1976 M.S., Curriculum and Child Development, Bank Street College of
Education

June 1973 B.S., Double Major: Philosophy and Religion, Bowdoin
College, Graduated cum laude

Publications:

Principal Leadership, A Publication of The National Association of Secondary School Principals; Monthly column titled The Instructional Leader. Sept 2006-2008.

Baron, D. (2005). Critical Friends, Core Values: Empowering Educators to Achieve Excellence. Educational Horizons, 17-28, Pi Lambda Theta.

Goodman, J., Baron, D., & Myers, C. (2005). Constructing a democratic foundation for school-based reform: The local politics of school autonomy and internal governance. In F. English (Ed.), Handbook of Educational Leadership. New York: Sage Press.

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Baron, D. (Sept. 1980). Photographs featured in Audobon; "*The Magazine of the National Audobon Society*" Volume 82, No. 5

Baron, D. (1979). "*A Case Study of Praxis* " The Journal of Curriculum Theorizing, 1:2 Center for the Study of Curriculum and Teaching, Graduate School of Education and Human Development, The University of Rochester, Rochester, N.Y.

Baron, D. (1977). "*Decision Making Revisited*" Viewpoints: Curriculum and Contemporary Social Influences, Bulletin of the School of Education, Indiana University, Vol. 53, No. 6,

Elected and Appointed Offices

1994-2000 Member of the Indiana Department of Education Relearning Faculty, *Indianapolis, IN*

1991-1994 President, Community Service Council, *Monroe County, IN*

1991-1992 Member of Strategic Planning Team of the Partners in Education, *Monroe County, IN*

1989-1993 Member and Spokesperson - Monroe County Community School Corporation Restructuring Task Force, *Monroe County, IN*

1986-1989 Chairperson of the Future of Our Youth Public Forum Program, *Monroe County, IN*

1984-1993 Board Member of the State Juvenile Justice Task Force, *Indianapolis, IN*

1983-1993 Vice President, Youth Service Bureau Board of Directors appointed by the County Commissioners, *Monroe County, IN*

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In my time as an attorney and certified legal intern I have worked on a wide array of legal issues in the fields of family law, criminal law, personal injury, real estate, and probate. I've effectively used my research and writing skills to assist the attorneys I've worked with, as well as the clients I've represented. During law school I focused on the areas of criminal law and family law while studying all aspects of trial advocacy. I have excelled in both group and individual settings by working in a diligent, efficient, and ethical manner.

Education

Indiana University

Bachelor of Arts & Sciences

May 2009/Bloomington, IN

- Graduated with Distinction
- Phi Beta Kappa Academic Honor Society
- Dean's List every semester beginning in Spring 2006 through Fall 2008.
- Major: Political Science
- Minor: Religious Studies
- Certificate of Journalism

Indiana University Maurer School of Law

Doctor of Jurisprudence

May 2012/Bloomington, IN

- GPA: 3.42/4.0

University of San Diego School of Law's Institute on International and Comparative Law

Summer 2010/Dublin, Ireland

- Studied at Trinity College in Dublin, Ireland
- Focused on international human rights and comparative civil law

Professional Experience

Law Office of Thomas M. Barr and Associates

- Associate
- Certified Legal Intern

October 2012-Present

May 2011-October 2012

Licenses and Professional Memberships

- Admitted to practice before the Courts of the State of Indiana and the Federal District Courts of the Northern and Southern Districts of Indiana
- Member of the Indiana State Bar Association
- Member of the Brown County Bar Association
- Member of the Indiana Trial Lawyers Association

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EDUCATION

Ed. D Educational Leadership (in progress, completion December 2013)
Indiana University - Bloomington
Curriculum and Instruction Minor, Higher Education area of focus

M.S. Educational Leadership and Secondary Administration, 2002
Indiana State University

B.S. Visual Art Education, 1993
Indiana University - Bloomington

PROFESSIONAL EMPLOYMENT

- 2007 - Present **Director & Sr. Assistant Vice Provost – Undergraduate Education, Indiana University, Bloomington**
Provide unit-wide leadership to programs within the division (Intensive Freshman Seminars, Advance College Project, OPEN Enrollment program, IU High School). Develop and facilitate multi-campus policies and strategic plans. Represent the division with external partnerships in the development of state-wide initiatives. Direct long-range plans for all programs. Develop and maintain program budgets; analyze and implement cost-savings measures. Support and facilitate collaborations with campus partners such as RPS, the College, First Year Experience programs, Student Ethics, and other relevant units. Provide supervision and administrative support to professional staff and support staff. Develop and implement strategies for student data collection and performance monitoring toward student retention goals (inclusive of General Education benchmarking research initiative).
- 2002 - Present **Director, Intensive Freshman Seminars – Indiana University**
Direct and assess all policies, goals, benchmarks and resources in support of program objectives. Provide direct supervision to staff. Work creatively with campus partners in the coordination of the complex, residential student program. Align program strategies with campus recruitment and retention goals. Seek out and maintain additional resources in support of underrepresented student populations. Recruit participating faculty and develop and implement faculty engagement seminars. Organize and facilitate course adoption guidelines, call for proposals, and selection committee. Analyze longitudinal student performance data; calibrate program attributes in support of retention goals.
- 2000 - 2002 **Assistant Principal - Brown County High School**
Supervised more than 50 professional staff members and coordinated effective staff development and evaluation. Managed student discipline and conduct procedures. Represented administration in expulsion hearings. Provided administrative guidance

in case conferences and I.E.P. creation. Developed and supervised alternative to suspension program. Served as liaison with building principals and central office administration. Updated and coordinated staff and student policy handbooks. Evaluated curriculum and course efficacy. Coordinated student activities program.

1994 - 2000

Visual Arts Teacher - Brown County High School

Provided comprehensive Visual Arts program at the Secondary Level. Designed, implemented, and assessed curriculum for a dozen separate courses. Participated in several school activities including: time restructuring committee; student policy and handbook committee; Student Council sponsor; women's tennis coach, and Fine Arts Academic Team coach.

1991-1993

Resident Assistant - Indiana University

Provided transitional support and served as a resource for students assigned my floors in Briscoe Quad. Completed rounds, documented incidents of potential student misconduct, advised judicial board.

RELATED EXPERIENCE

Boards / Committees

High School to College Transition Advisory Committee
Center for Excellence in the Leadership of Learning

Vice-President, Board of Directors
Stepping Stones Youth Homeless Transition Program

Member, Board of Directors
Green Meadow Charter Initiative

Policy Council for Student Affairs
IU- Bloomington

Early College High School Steering Committee
Monroe County Community School Corporation

Academic Initiatives and Services Committee (2004-2007)
Residential Programs and Services, IU-Bloomington

Presentations

Intensive Freshman Seminars: Academic Immersion in a Summer Intensive
18th International Conference on the First Year Experience
Southampton England, 2005

Navigating the Transition to College: Linking Research on the First Year of College to School Counseling
Indiana Association of School Counselors. Indianapolis, 2002

Michele Fredrica Brentano

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Areas of Expertise:

- ★ Training coaches, teachers, administrators for Culturally Responsive School-wide Positive Behavior Support
- ★ Facilitating professional learning communities.
 - □ Guided colleagues through the process of examining student work as the premise for informing instruction and reflective teaching.
 - □ Conducted peer observations amongst colleagues.
 - □ Coached Critical Friends Groups.
- ★ Developing/facilitating school reform decision-making processes.
 - □ Implemented and facilitated SUCCESS (Success Unlimited for Clear Creek Elementary School Students) guiding a group of teachers, parents, students, community members through a Vision-to-Action systemic change process.
 - □ Facilitated analysis of data to drive instruction.
- ★ Creating/implementing authentic assessment tools.
 - □ Designed alternative assessments using rubrics, student-led conferencing, goal setting, videotaping and proficiency notebooks.
- ★ Designing elementary school curricula.
 - □ Developed K-6 Science and Math standards and curriculum guides for Monroe County Community School Corporation.
- ★ Teaching in elementary multi-age classroom.
 - □ Collaborated with teaching team to design multi-age program.
 - □ Implemented Reading and Writing Workshops for the classroom.
 - □ Created classroom community and positive behavior supports as strategies for classroom management.
- ★ Conducting workshops in assessment, inclusion, decision making processes, school reform, writing workshop, thematic studies.
- ★ Mentoring new teachers, student teachers, and practicum students.
- ★ Authored and received grants for school improvement.
 - □ \$5000 from Raymond Foundation to bring in the Reading and Writing Project from Teachers College, Columbia University as professional development for teachers of MCCSC.
 - □ \$500 from FMCCS (Foundation of Monroe County Community Schools) for a service-learning project.
 - □ \$500 from FMCCS for purchasing pedometers for the Physical Education curriculum at Clear Creek Elementary.

Experience:

- 2008-Present Educational Consultant, Center On Education and Lifelong Learning, Indiana Institute On Communities and Disabilities, Indiana University, Bloomington, IN
- 2008 Summer Ivy Tech College for Kids Instructor, Bloomington, IN
- 1990-2008 Elementary Teacher - Primary Multi-age, 4th, 5th Grade, Clear Creek Elementary School, Bloomington, IN
- 1989-1990 Elementary Intermediate Teacher - 5th Grade, Templeton Elementary School, Bloomington, IN
1998. 1988-1998 Substitute Teacher, all levels, MCCSC, Bloomington, IN

Trainings & Education:

- CFG Coaches Training**, MCCSC, Bloomington South High School 2005
- MCCSC Mentor Training**, Indiana Institute on Disability & Community 2004
- Masters of Education**, Curriculum & Design, Indiana Wesleyan Univ. 2000
- Project TIE**, Indiana Univ., Teaming for Inclusive Education 1998
- Bachelor of Arts** Elementary Education & Religious Studies, Indiana University, Bloomington, Indiana 1988
- QUEST Project**, IU, Science Courses for Elementary Teachers 1992-1993
- Undergraduate Courses**, Univ. of Missouri, Columbia, Missouri 1970-1971

Presentations/Workshops/Coaching:

- Student Voice**, PBIS Indiana Coaches' Forum, Indianapolis, Indiana (2013)
- Enhancing Culturally Responsive Family Engagement Through PBIS Implementation**, Association for Positive Behavior Support 9th International Conference, Atlanta, Georgia (2012)
- Doing It Differently at the High School: Creating Momentum for SW PBS**, Association for Positive Behavior Support 9th International Conference, Atlanta, Georgia (2012)
- High School Teachers Teach Content: Implications for SW PBS at the High School**, Indiana Association for School Principals, Indianapolis, Indiana (2011)
- PBIS Indiana and School-wide Positive Behavior Support** Indiana Association for School Principals, Indianapolis, Indiana (2011)
- PBIS Indiana: Applying Culturally Responsive Practice to Positive Behavior Supports**, Association for Positive Behavior Support 8th International Conference,

Denver, Colorado (2011)

High School Teachers Teach Content: Implications for SW-PBS

Implementation, Association for Positive Behavior Support 8th International Conference, Denver, Colorado (2011)

Positive Behavior Support, Center on Education and Lifelong Learning, various school districts in Indiana (2008-present)

RTI and PBS, Special Education Roundtable, Madison, Indiana (2009)

Classroom Management, Center on Education and Lifelong Learning, Elkhart, Indianapolis, Evansville, Indiana (2008-2009)

Critical Friends Groups, Hoosier School Reform Foundation, Bloomington, Indiana (2006-2007)

Creating a Compassionate Community: Linking Service Learning and Literacy, Whole Language Umbrella, Minneapolis, Minnesota (2003)

Indiana Student Achievement Institute, Indiana Department of Education, various school districts throughout Indiana (1996-2001)

Karen Conner
Financial Management Oversight
Board Member

Karen Conner, CPA, CGMA, MPA

580 Fairway Lane, Bloomington, IN 47403, Phone: 812-360-3339, Email:
karen.conner@earthlink.net

Education

KELLEY SCHOOL OF BUSINESS, INDIANA UNIVERSITY-BLOOMINGTON
Master of Professional Accountancy, May 1999

Professional Experience

BLOOMINGTON SHUTTLE SERVICE/GO EXPRESS TRAVEL

Chief Financial Officer, January 2012 to present

TOBY PRINCE, CPA, INC.

Certified Public Accountant; January 2009 to January 2012

ACCOUNTING STRATEGIES, INC.

Principal; June 2005 to September 2008

ROOT & ASSOCIATES, CPAs

Director of Taxation; January 2003 to April 2005

COOK GROUP, INC.

Tax Accountant; June 2002 to December 2002

BKD, LLP

Senior Accountant; June 1999 to June 2002

Teaching Experience

INDIANA UNIVERSITY SCHOOL OF PUBLIC AND ENVIRONMENTAL AFFAIRS;

Adjunct Professor, Not-for-Profit Accounting; January 2008 to January 2012

INDIANA WESLEYAN UNIVERSITY; MBA PROGRAM

Adjunct Professor, Taxation, Financial Accounting; September 2005 to present

IVY TECH COMMUNITY COLLEGE;

Adjunct Professor, Advanced Accounting and Tax; September 1998 to December 2005

Professional Affiliations

AMERICAN INSTITUTE OF CERTIFIED PUBLIC ACCOUNTANTS

INDIANA CPA SOCIETY

Leadership Cabinet Member Ethics Committee Member Education Task Force

INSTITUTE OF MANAGEMENT ACCOUNTANTS

Community Involvement

BLOOMINGTON HOSPITAL FINANCE COMMITTEE Public member

OPTIONS FOR BETTER LIVING

Board Member (treasurer)

CENTER FOR WOMEN'S MINISTRIES

Board Member (treasurer)

EVANGELICAL COMMUNITY CHURCH

Deacon Board Member

ANDREA M. GOLDEN
3780 Collins Drive
Bloomington, IN 47404
(812)876-7780

EDUCATION

1996 A.B.D., Art History, Indiana University
1991 M.F.A., Art History, Ohio University
1989 B.A., *Magna Cum Laude*, Art History, Mansfield University

WALDORF TRAINING/CONFERENCES

2013-present Applied Arts Program
Handwork Teacher Education
Fiber Arts Studio, Threefold Educational Center
Summer 2010 The Grade Four Online Intensive with Eugene Schwartz
Millennial Child
Summer 2009 *Bringing Waldorf Home: Meeting the Developmental Needs of Children*
Washington Waldorf School, Bethesda, MD
Summer 2008 *Inspiring your Child's Education* with David Darcy
Summer 2008 *Bringing Waldorf Home, Waldorf Essentials*
George Mason University Fairfax, VA
Summer 2007 *Waldorf Curriculum and Child Development* with Barbara Dewey
Summer 2006 Watercolor Painting Workshop
Susquehanna Waldorf School, Marietta, PA
Summer 2006 Christopherus Waldorf Homeschooling Conference with Donna Simmons

PROFESSIONAL EXPERIENCE RELATED TO WALDORF EDUCATION

2005 – present Yarns Unlimited Bloomington, IN
Handwork Instructor
2006 – present Waldorf-inspired Home Educator Bloomington, IN
2003-2005 Sycamore Spring Waldorf School Initiative Bloomington, IN
Co-founder
Board member
2002-2003 Children's Garden Waldorf-inspired Preschool Bloomington, IN
Classroom Assistant

TEACHING EXPERIENCE

Instructor at Indianapolis Museum of Art: Indianapolis, IN
February 2000 Introduction to Italian Old Masters
Adjunct Professor at Indiana State University: Terra Haute, IN
Fall 1998 Women and the Visual Arts
Honors Division Instructor at Indiana University: Bloomington, IN

Teaching Assistant at Indiana University: Bloomington, IN
1992-95 Survey of Art: Ancient to Medieval
Survey of Art: Renaissance through Modern
Art Appreciation
Survey of Twentieth-century Art

Teaching Assistant at Ohio University: Athens, OH
1990-92 Survey of Art: Ancient through Early Christian/Byzantine
Survey of Art: Medieval through Renaissance
Survey of Art: Baroque through Modern
Summer 1991 On-site instruction in Italy, Art History in Italy with Ohio University

OTHER PROFESSIONAL EXPERIENCE

1998-present Curatorial Assistant, Indianapolis Museum of Art
1995-1998 Research Assistant, Dr. Molly Faries, Indiana University
1995-1997 Academic Advisor, Honors Division, Indiana University
Summer 1988 Intern, Museum of Modern Art, New York, NY

ACADEMIC AWARDS

Norton Foundation Scholarship, 2013-2014
Allen W. Clowes Fellowship, 1999-2001
Friends of Art Dissertation Grant, 1997
Friends of Art Travel Grant, Spring 1994
Renaissance Studies Fellowship, Indiana University, Fall 1992
Outstanding Teaching Award, Ohio University, 1991

PUBLICATIONS

Golden, Andrea. (2004) Creating and Re-creating: The Practice of Replication in the Workshop of Giovanni Bellini. *Giovanni Bellini and the Art of Devotion*, Indianapolis Museum of Art, 91-127.

Biographical Entry on Alesso Baldovinetti, *Encyclopedia Americana*

Essay on a *Madonna and Child* attributed to Cenni di Francesco di Ser Cenni for the Birmingham Museum of Art Kress Collection Catalogue (forthcoming)

MARY BARR GORAL
2517 Country Club Road
Nashville, IN 47448
502-553-0614
drmarygoral@gmail.com

EDUCATION

Ph.D., Curriculum Studies and Mathematics Education, Indiana University, Bloomington, Indiana. February, 1997. Dissertation: *Transformational Possibilities of Schooling: A Study of Waldorf Education*. Director: Jesse Goodman

Endorsement in Gifted and Talented Education, Indiana University, Bloomington, Indiana, 1989.

M.S., Elementary Education, Indiana University, Bloomington, Indiana, 1985.

B.S., Elementary Education, Indiana University, Bloomington, Indiana, 1981.

PROFESSIONAL EXPERIENCE

Indiana University, Bloomington, IN, Adjunct Professor, 2011 -

Kentachten Teacher Training, Education Director, Louisville, KY, 2005-

Transformational Teaching, Educational Consultant, 2002 –

Bellarmino University, Louisville, KY, Associate Professor, 2007 – 2010.

Bellarmino University, Louisville, KY, Assistant Professor, 2003-2007.

Mount Mary College, Milwaukee, WI, Instructor & Director Great Lakes Teacher Training, December 2001 – 2004.

Prairie Hill Waldorf School, Pewaukee, WI, 7th and 8th Grade Teacher, 2000 - 2002.

Mount Mary College, Milwaukee, WI, Director of Early Childhood/Elementary/Middle Education, 1999-2001.

Mount Mary College, Milwaukee, WI, Assistant Professor, 1998-2001.

Hanover College, Hanover, IN, Assistant Professor, 1997-1998.

Hanover College, Hanover, IN, Instructor, 1995-1997.

Monroe County Community School Corporation, Bloomington, IN. Elementary School Teacher, 1984-1995.

Indiana University, Bloomington, IN. Associate Instructor, Student Teaching Supervisor, 1994-1995.

Indiana University, Bloomington, IN. Graduate Assistant, Javitz Grant for Rural Gifted Students, 1993-1994.

Indiana University, Bloomington, IN. Associate Instructor, Mathematics and Science Early Field Experience, 1992.

BOOKS PUBLISHED

Goral, M. (2009). *Transformational teaching: Waldorf-inspired methods in the public school*. NY: Steiner Books.

PEER REVIEWED PUBLICATIONS

Goral, M. (2010). Teacher support and revival of twelve case studies in Waldorf-inspired public schools. March 2010. *Encounter: Education for Meaning and Social Justice*.

Goral, M. (2009). From kinesthetic movement to algebraic functions. *Mathematics in the Middle School*. 14(7), 388-391.

Goral, M. (2009). Teaching sustainability through science: One method's class experience and journey. *Community Works Journal*.

Goral, M. & Gilderbloom, P. (2008). You couldn't find this in a store! Using measurement skills to make felt pencil cases. *Australian Primary Mathematics Classroom*. 13(7), 23-27.

Goral, M. & Wiest, L. (2007). An arts based approach to teaching fractions. *Teaching Children Mathematics*, 14(2), 74-80.

Goral, M. (2006). Education for a sustainable future: Creating environments where students can learn. *Democracy & Education*, 16(3), 25-28.

Goral, M., Bucalos, A., Gnadinger, C., & Norris, M. (2006). The courage to teach: Reflections on renewal. *Encounter: Education for Meaning and Social Justice*, 19(2), 45-51.

Goral, M. & Gnadinger, C. (2006). Using storytelling to teach mathematics concepts. *Australian Primary Mathematics Classroom*, 11(1), 4-8.

Goral, M. (2000). A connective pedagogy. *Paths of Learning*, 2 (6), 54-60.

Goral, M. & Chlebo, J. (2000). Where's Waldorf? *Encounter*, 13 (3), 43-52.

Wiest, L. & Sturbaum, M. (1996). Need problem solving ideas? Take a trip! *School, Science, & Mathematics*, 96(4), 187-191.

Sturbaum, M. (1994). From community service to social action: One fourth grade classroom's journey. *Democracy and Education*, 9 (2), 29-30.

Instructional Materials

Adair, D., Anderson, S., Carter, J., Hamilton, W., Nordmann, N., Shiffrin, S., Stuckey, K., Sturbaum, M., Svetcoff, P., Wischler, D., Wischler, M. Wood, R. (1987). *Teachers teaching teachers to implement "Minds-On" elementary science*. Prepared with support from the Indiana Department of Education and the Education for Economic Security Demonstration and Exemplary Programs.

FUNDED GRANTS

Goral, M. (2013). *Waldorf-inspired Project*. Proposal submitted to the Norton Foundation. Amount funded: \$60,000.00

Goral, M. (2012). *Waldorf-inspired Project*. Proposal submitted to the Norton Foundation. Amount funded: \$60,000.00

Goral, M. (2011). *Waldorf-inspired Project*. Proposal submitted to the Norton Foundation. Amount funded: \$65,000.00

Goral, M. (2010). *Waldorf-inspired Project*. Proposal submitted to The Norton Foundation. Amount funded: \$60,000.00.

Goral, M. (2009). *Waldorf-inspired Project*. Proposal submitted to The Norton Foundation. Amount funded: \$65,000.00.

Goral, M. (2008). *Waldorf-inspired Project*. Proposal submitted to The Norton Foundation. Amount funded: \$65,946.00.

Goral, M. (2007). *Waldorf-inspired Project*. Proposal submitted to The Norton Foundation. Amount funded: \$59,229.03.

Goral, M. (2006). *Waldorf-inspired Project*. Proposal submitted to The Norton Foundation. Amount funded: \$46,713. 03.

Goral, M. (2005). *JCPS Waldorf-inspired Project*. Proposal submitted to The Norton Foundation. Amount funded: \$39,508.00.

Imes, M. & Goral, M. (2003). *Great Lakes Teacher Training*. Proposal submitted to The Bader Foundation, Milwaukee, WI. Amount funded: \$20,000.00.

Goral, M. (2000). *Faculty Development Project*. Proposal submitted to Mount Mary College. Amount funded: \$2,000.00.

Goral, M. (1999). *Faculty Development Project*. Proposal submitted to Mount

Mary College. Amount funded: \$600.00.

Goral, M. (1998). *Scholarship and Travel Grant*. Proposal submitted to Faculty Hanover College. Amount funded: \$500.00

Sturbaum, M. (1997). Faculty International Study Trip. Proposal submitted to Hanover College. Amount funded: \$3,500.00.

PROGRAMS/TRAININGS/SCHOOLS CREATED

Green Meadows Charter School. A Waldorf-inspired charter school focusing on social justice and environmental sustainability. Founding member. School slated to open Fall, 2015.

Masters of Arts in Education with an Emphasis in Waldorf Education – A Masters Program at Bellarmine University. Created and implemented in 2005.

Kentahten Teacher Training – A teacher training inspired by Waldorf education. Created and implemented in 2005 for public school teachers.

Great Lakes Waldorf Teacher Training – A Waldorf Teacher Training with a Masters from Mount Mary College. Created and implemented in 2002.

PROFESSIONAL PRESENTATIONS

International and National Presentations

Goral, M. & Oberman, I. (2013). Learning Journey of Three Title I Waldorf-inspired Schools on the Road to Reading Opportunities and Challenges. A presentation made at the Alliance for Public Waldorf Education Conference. Sacramento, CA. January 2013.

Goral, M. (2011). Creating Curriculum for Farm and Garden-Based Education. A presentation made to the FBEBA (Farm-Based Education Based in Anthroposophy) group. Hawthorne Valley, NY: November, 2011.

Goral, M. (2009). Transformational Teaching: Waldorf-inspired Methods in the Public School. A presentation made to the WEA (Wisconsin Education Association) State Convention, Madison, Wisconsin, October, 2009.

Goral, M. (2009). Support and Revival of the Waldorf-inspired Cadre: Ten Case Studies. A presentation made to the American Education Research Association (AERA), San Diego, CA, April, 2009.

Goral, M. (2008). Teaching Environmental Sustainability in Math Class. A presentation made to the WEA (Wisconsin Education Association) State Convention, Madison, Wisconsin, October.

Goral, M. (2008). *Green Schools and Outdoor Classrooms*. A presentation made

at the Rouge Forum, Louisville, KY. March.

Goral, M. (2008). *Transformational Teaching: Using Waldorf-Inspired Methods in the Public Schools*. A presentation made to the AERA (American Educational Research Association) pre-session, March.

Goral, M. (2007). *Teaching Science for a Sustainable Future*. A presentation made to the WEA (Wisconsin Education Association) State Convention, Milwaukee, Wisconsin, October.

Goral, M. (2007). *A Waldorf-Inspired Approach to Teaching Mathematics*. A presentation made to the National Council of Teachers of Mathematics (NCTM) national convention. March.

Goral, M. (2007). *Teaching Sustainability Through Science*. Proposal accepted for Hawaii International Conference on Education, Honolulu, Hawaii. January.

Goral, M. (2006). *Creating Environments Where Students Can Learn*. A paper presented at the WEA (Wisconsin Education Association) State Convention, Madison, Wisconsin, October.

Goral, M. (2006). *Reverence and Respect for All*. A presentation made to the WEA State Convention, Madison, Wisconsin, October.

Goral, M. (2005). *Consciousness and Solidarity: One School of Education's Process and Journey*. A paper presented at the IERG (Imagination in Education Research Group) International Conference, Vancouver, British Columbia, July.

Goral, M. (2005). *Current Educational Research Supporting Waldorf Education*. A lecture presented at the Conference on Waldorf in the Public Sector, Rudolf Steiner College, Sacramento, CA, January.

Goral, M. (2003). *Teaching for a Sustainable Future*. A professional clinic presented at the Cardinal Stritch University Conference on Leadership for the 21st Century, Milwaukee, WI, March.

Goral, M. (2000). *Where's Waldorf? Waldorf Education in the Context of School Restructuring and Reform*. A paper presented at the annual meeting of the American Educational Research Association (AERA), New Orleans, April.

Goral, M. & Stacki, S. (2000). *Affective Objectives and the Preservice Teacher*. A paper presented at the annual meeting of the Association of Teacher Educators (ATE), Orlando, FL, February.

Goral, M. (1998). *A Healing Education For All: Waldorf Inspired Pedagogy for Early Childhood and Elementary Preservice Teachers*. A paper presented at the annual

meeting of the Journal of Curriculum Theorizing (JCT). Bloomington, IN, October.

Goral, M. (1998). *Mysticism in the Mainstream: A Study of Waldorf Schools in Scandinavia*. A paper presented at the annual meeting of the American Educational Research Association, San Diego, CA, April.

Goral, M. (1997). *Teachers and Teaching in a Waldorf School*. A paper presented at the annual meeting of the Journal of Curriculum Theorizing (JCT). Bloomington, IN, October.

Sturbaum, M. (1996). *Spirituality in Education: Themes of Learning for the 21st Century*. A paper presented at the annual meeting of the Journal of Curriculum Theorizing (JCT). Nashville, TN. October.

Sturbaum, M. (1994). *From Community Service to Social Action: One Fourth Grade Classroom's Journey*. A paper presented at the annual meeting of Democracy and Education. Athens, Ohio. June.

Sturbaum, M., Wiest, L., & Stacki, S. (1993). *Casing Out Case Studies*. A paper presented at the annual meeting of the Journal of Curriculum Theorizing (JCT). Dayton, Ohio. October.

Sturbaum, M. & Stacki, S. (1993). *Morality in the Middle: Teacher's Share Their Views on Roles and Training*. A paper presented at the annual meeting of the Journal of Curriculum Theorizing (JCT). Dayton, Ohio, October.

Sturbaum, M. & Treadway, E. (1993). *Unity and Diversity: A Global Education Workshop for Elementary Teachers*. A paper presented at the annual meeting of the Journal of Curriculum Theorizing (JCT). Dayton, Ohio. October.

Wiest, L. & Sturbaum, M. (1993). *Mathematics Education in Scottish Primary Schools*. A paper presented at the annual meeting of the Journal of Curriculum Theorizing. Dayton, Ohio. October.

Regional and Local Presentations

Goral, M. (2013). An Overview of Waldorf Education. Presented to faculty and staff at Tomorrow River Community Charter School. June, 2013.

Goral, M. (2013). Teaching Language Arts. Presented to faculty and staff at Tomorrow River Community Charter School. August, 2013.

Goral, M. (2013). Nature-based Education. Presented to faculty and staff at Tomorrow River Community Charter School. November, 2013.

Goral, M. (2013). Schooling for a Regenerative Future: Lessons from Waldorf Education. Public Meeting Presentation made to the community in Hailey, Idaho. November, 2013.

Goral, M. (2013). *Toward a Culture of Community*. A presentation made to the INDY Waldorf Group. Indianapolis, IN. 2013.

Goral, M. (2012). *Introduction to Waldorf Education*. A presentation made to teachers in Jefferson County Public Schools, Louisville, KY. November

Goral, M. (2012). *Integrating the curriculum: The 2012 election*. A presentation made to teachers at Meredith Dunn School. Louisville, KY. September.

Goral, M. (2010). *Introduction to Waldorf Education*. A presentation made for teachers in Jefferson County Public Schools, Louisville, KY. November.

Goral, M. (2010). *Teaching Storytelling*. A presentation made to teachers at Meredith Dunn School. Louisville, KY. October.

Goral, M. (2010). *What is Waldorf Education?* A presentation made for Art Administration majors at Indiana University. Bloomington, IN. April.

Goral, M. (2010). *Head, Hands, and Heart*. A presentation made for the Bellarmine Center for Teacher Excellence. Louisville, KY. January.

Goral, M. (2009). *Children and Play: Research behind the Practice*. A presentation made to the first annual Children at Play conference, Bernheim Forest, KY, October.

Goral, M. (2009). *Research Supporting Waldorf Education*. A presentation made to parents and teachers at the Waldorf School of Louisville, March.

Goral, M. (2008). *Integrating Waldorf-Inspired Methods*. Presentation made to Byck Elementary School Faculty. October.

Goral, M. (2006). *Waldorf Education: A Vision for the Future*. Lecture presented for Waldorf School of Louisville Fundraising Event. May.

Goral, M. (2005). *Education for a Sustainable Future: Current Research Supporting Waldorf Schools*. A paper presented to Shining Rivers Waldorf School, St. Louis, MO, November.

Goral, M. (2005). *Education for a Sustainable Future: Current Educational Research Supporting Waldorf Education*. A paper presented to Sycamore Springs Waldorf Initiative, Bloomington, IN, June.

Goral, M. (2004). *Waldorf Education in Today's World*. A lecture presented to the parents at Prairie Hill Waldorf School. Pewaukee, WI. March.

Goral, M. (2003). *Challenging our Best and Brightest*. A professional clinic

presented to Catholic School Principals. Louisville, KY. September.

Goral, M. (2002). *Waldorf Education in the Public School Setting*. A lecture presented to the Waukesha County Administrative Group. Prairie Hill Waldorf School. Pewaukee, WI. January.

Goral, M. (2001). *Spirituality in Education*. A lecture presented at the Unity Church, Bloomington, IN, June.

Goral, M. (1999). *How to Talk about Waldorf Education*. A professional clinic presented at Prairie Hill Waldorf School, Pewaukee, WI, November.

Goral, M. (1999). *Connective Pedagogy*. A paper presented at the annual meeting of the Midwest Regional Conference on Waldorf Education, Milwaukee, WI, October.

Goral, M. (1998). *An Introduction to Rudolf Steiner and Waldorf Education*. A lecture presented at the Faculty Forum. Hanover College, Hanover, IN. May.

Sturbaum, M. (1995). *A Kinesthetic Approach to Teaching Mathematics*. A lecture presented for Talk and Tea, Indiana University Department of Mathematics Education. Bloomington, IN. November.

Workshop Presentations

Goral, M. & Stottmann, D. (2013). An introduction to Waldorf Education. A workshop presentation made to teachers in Shelby County, KY. April.

Goral, M. & Stottmann, D. (2012). Teaching storytelling through the grades. A workshop presentation made to the Waldorf-inspired Cadre. Louisville, KY. September.

Goral, M. & Ruud, M. (2012). Teaching writing in a Waldorf-inspired charter school. A 4-day workshop presented to the teachers at Blue Oak Charter School. Chico, CA. August.

Goral, M. & Stottmann, D. (2010). The Extra Lesson. A workshop presentation made to the Waldorf-inspired Cadre. Louisville, KY. February.

Goral, M. (2010). Using the Arts to Teach Mathematics II. A presentation made to the faculty at Meredith Dunn School. Louisville, KY. January.

Goral, M. (2009). Using the Arts to Teach Mathematics. A presentation made to the faculty at Meredith Dunn School. Louisville, KY. October.

Goral, M. (2009). Teaching Math Through the Arts. A presentation made to the faculty at Klondike Elementary. Louisville, KY. July.

Goral, M. (2007). *Using Waldorf-Inspired Approaches to Teach Mathematics*. A workshop presented for the faculty at Heritage Elementary, Shelbyville, KY. November.

Goral, M. (2007). *Best Practices for Teaching Mathematics*. A workshop presented for the faculty of Dunn Elementary School, Louisville, KY. July.

Goral, M. (2006). *Teaching Mathematics Using Multiple Intelligences and Best Practice: A Waldorf Inspired Approach..* A workshop presented to the faculty at Dann C. Byck Elementary School. Louisville, KY. August.

Goral, M. (2005). *Teaching for All Learners: Using Movement, Music, and Story to Teach Mathematics and Science*. A workshop presented to the faculty at Shining Rivers Waldorf School. St. Louis, MO. November.

Goral, M., O’Laughlin, K., & Ruud, M. (2005). *Weaving Movement and the Arts into the Core Content*. A workshop presented to the JCPS Waldorf Inspired Cadre and friends. Louisville, KY. September.

Goral, M. (2005). *Education for a Sustainable Future: Thriving and Surviving in the 21st Century*. A workshop presented at the AWSNA (Association of Waldorf Schools of North America) Southwest Regional Teachers’ Conference. Boulder, CO. February.

Goral, M. & O’Laughlin, K. (2004). *Growth of Culture and Freedom in the United States: An African American Journey*. A workshop presented to the Waldorf Inspired Cadre. Louisville, KY. November.

Goral, M. (2004). *Weaving Literacy into the Social Studies*. A workshop presented to the JCPS Waldorf Inspired Cadre. Louisville, KY. September.

Goral, M., & Pullen, M.. (2004). *Teaching to Today’s Learners*. A week-long workshop presented to the faculty of Kentucky Country Day School. Louisville, KY. June.

Goral, M. & Pullen, M. (2004). *Transformational Teaching: Integrating the Arts into the Academic Subjects*. A week-long workshops presented to the JCPS Waldorf Inspired Cadre. Louisville, KY. June.

Goral, M. (2004). *Making Meaning through the Creation of Image*. A workshop presented to the JCPS Waldorf Inspired Cadre. Otter Creek State Park, KY. March 5.

Goral, M. (2004). *Teaching Mathematics Through Literature and the Arts II*. A workshop presented to the JCPS Waldorf Inspired Cadre. Louisville, KY. January.

Goral, M. (2003). *Teaching Mathematics Through Literature and the Arts I*. A workshop presented to the JCPS Waldorf Inspired Cadre. Louisville, KY. October.

Goral, M. (2003). *The Art of Ritual*. A workshop presented to the faculty of

Milwaukee's Expeditionary Learning Charter School. August.

Goral, M. (2003). *Transformational Teaching: Using Storytelling, Movement, and Music to Engage Learners*. A week-long workshop presented to public and private school teachers in Louisville, KY. June.

Goral, M. (2003). *Life Enhancement for Teachers*. A workshop presented to public and private school teachers at the Ommani Center, Pewaukee, WI, January.

Goral, M. (2002). *Life Enhancement for Teachers*. A workshop presented to public and private school teachers at the Ommani Center, Pewaukee, WI. March.

Goral, M. (2000). *The Art of Waldorf Education*. A workshop presented to the faculty at The Arts Academy. Robinsdale, MN. June.

Goral, M. (2000). *Problem/Project Based Learning*. A workshop presented to the faculty at Cornerstone Achievement Academy, Milwaukee, WI. May.

Goral, M. (1999) *Connecting Waldorf Education to Current Reform and Restructuring Efforts*. A lecture presented to parents at Prairie Hill Waldorf School, Pewaukee, WI. May.

Goral, M. (1999) *Teaching Mathematics Through Story, Movement and Music*. A workshop presented for the faculty of St. Paul Catholic School, Genesse Depot, WI. March.

Goral, M. (1997). *Research Topics in Waldorf Education*. A lecture presented to the faculty of the Rudolf Steiner School of Ann Arbor. Ann Arbor, MI. November.

Sturbaum, M. (1992). *Learning Styles and Brain Theory*. A workshop presented for Valparaiso Public Schools, Valparaiso, IN. October.

Sturbaum, M. (1992). *Learning Styles and Brain Theory*. A workshop presented for Plainfield Public Schools, Plainfield, IN. August.

Sturbaum, M. (1992). *Integrating Music into the Curriculum*. A workshop presented for Monroe County Community School Corporation, Bloomington, IN. May.

Sturbaum, M. (1990). *Mathematics Enrichment for Elementary Teachers*. A workshop presented for Monroe County Community School Corporation, Bloomington, IN. April.

Sturbaum, M. (1986). *Hands on Science for Elementary Teachers*. A series of workshops presented for Monroe County Community School Corporation, Bloomington, IN. Fall.

PROFESSIONAL MEMBERSHIPS

Member, National Council of Teachers of Mathematics. 1994-2010.

Member, National Science Teachers Association, 2009 – 2010.

Member, Association for Supervision and Curriculum Development. 1994- 1996.

Member, American Educational Research Association. 1996- 2010

Member of the Rudolf Steiner College Board of Trustees. July 2008 – 2011.

SERVICE

Professional

Board of Trustees Member for the Rudolf Steiner College, Fair Oaks, CA. 2008-2011.

Planning Committee Member for Pre-AERA Session, Waldorf education in the public school setting, 2008-2009.

St. Francis of Goshen Gardening Group, 2008-2009.

Steering Committee Member for the Waldorf Inspired Magnet Program at Dann C. Byck Elementary, Louisville, KY. 2006 – 2010.

Textbook Review: Kennedy, L., Tipps, S. & Johnson, A. (2006). *Guiding Children's Learning of Mathematics*, 11th, ed. Belmont, CA: Thomson & Wadsworth.

Articles Reviewed – *Teaching Children Mathematics*, 2006 - 2010.

Articles Reviewed – *Mathematics in the Middle School*, 2008 – 2010.

American Educational Research Association (AERA) - Wholistic Education Special Interest Group. Co-President, 2000-2001

American Educational Research Association (AERA) - Wholistic Education Special Interest Group. Treasurer, 1998-2000

Board Member – Prairie Hill Waldorf School, Pewaukee, WI, 2000-2001.

University Committees: Bellarmine University

Faculty Development Committee Member, 2009 – 2010

Bellarmino Farm Committee Member, 2009 - 2010

Thomas Merton Committee Member, 2008-2010

Wyatt Scholarship Committee Member, 2010

Graduate Educational Affairs, Committee Chair, 2007-2008

Faculty Council, 2007-2009
Faculty Council Coordinating Committee, 2007-2008
Wyatt Scholarship Committee, Committee Chair, 2007 – 2009
School of Education Search Committee, Committee Chair, 2007
Faculty Affairs Subcommittee, Chapter 7, 2003-2007.
School of Education NCATE Committees, 2003 – 2006
School of Education Scholarship and Collegiality Committee Chair, 2004-2006
Teacher Education Advisory Board, 2003 – 2010
Faculty Search Committee, 2005
Faculty Council, 2004-2005
Wyatt Scholarship Committee, 2004-2006
Freshman Focus Instructor. 2004-2007

University Committees: Mount Mary College

Faculty Senate Secretary, 1999-2000
Teacher Education Advisory Board, 1998 – 2000
Faculty Search Committees, 1998 - 2000

University Committees: Hanover College

Teacher Education Subcommittee, 1995 – 1998
Merit Scholarship Committee, 1996 – 1998
Faculty Search Committees, 1996-1998

REFERENCES

Available upon request

WILLIAM W. GORAL
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Nashville, IN 47448
(502) 599-6356

EDUCATION

Master of Arts in Teacher Education
Aurora University, Aurora, Illinois. 1992
45+ additional graduate credits in
Teacher Education, 1993-2004

B.S., Physical Education/Coaching Certificate
University of Wisconsin, Madison, WI 1978

PROFESSIONAL EXPERIENCE

Bellarmino University, Louisville, KY
Student Teaching Supervisor, August 2004–2007

Bellarmino University, Louisville, KY
Adjunct Professor, August 2005 – 2011
Education, Exercise Science and Freshman Focus (2009)

Muskego-Norway Public Schools, Muskego, WI
Physical Education Teacher, grades K-12
1979-1997 and 1998 – 2004.

Muskego-Norway Public Schools, Muskego, WI
Middle School Department Contact, 1999-2004.

Indiana University, Bloomington, IN
Student Teaching Supervisor, August 1997-May 1998.
Instructor for Student Teaching Seminar,
August 1997-May 1998.

Prairie Hill Waldorf School, Pewaukee, WI
Boys' Basketball Coach, 7th and 8th Grade, 2000-2002.
Girls' Basketball Coach, 6th Grade, 2002-2003.

Muskego-Norway Public Schools, Muskego, WI
Girls' Volleyball Coach, 8th Grade, 1983-1989.
Girls' Basketball Coach, 7th and 8th Grade, 1988-1991.
Boys' Basketball Coach, 7th and 8th Grade, 1986-1993.

Brookfield Recreation Department, Muskego, WI
Director of Little League Program, 1979-1982.
Acting Director, June 1982-May 1983.

Bay Lane Middle School, Muskego, WI
Building Liaison for Student Assistance Program, 1990-1996
Student Assistance Group Facilitator, 1990-1996, 1999.

PRESENTATIONS Games That Teach – Week-long Workshop presented to Waldorf-Inspired Cadre, Louisville, KY – July 2007 and July 2008 and July 2010.

Rethinking Physical Education – Workshop presented to Jefferson County Public School Practical Living Teachers, Louisville, KY – November 2005.

Transformational Teaching – Bringing Movement and Physical Activities into the Elementary Classroom, Louisville, KY – June 2003.

Hanover College Department of Education – Integrating Physical Education into the Elementary Classroom, Hanover, IN – May 1998.

CONFERENCES American Educational Research Association (AERA) National Convention, San Diego, CA, April 2004.

Wisconsin Education Association State Convention, LaCrosse, WI, Summer 2002.

Rudolf Steiner College/Waldorf Institute, Sacramento, CA, Summer 1998.

Journal of Curriculum Theorizing (JCT), National Conference, Bloomington, IN, October 1997.

AERA National Convention, Chicago, IL, April 1997.

AERA National Convention, New York, NY, April 1996

PROFESSIONAL MEMBERSHIPS Member, AAHPERD – American Association for Health, Physical Education, Recreation, and Dance, 1996- 2000.

Member, AERA – American Educational Research Association, 1996-1998.

REFERENCES AVAILABLE UPON REQUEST

Donald C. Griffin, Jr.

115 S. Bryan Ave., Bloomington, IN 47408

812-327-9232, griffin@homemfinder.org

Highlight of Qualifications:

- Twenty years of experience as a real estate professional
- Marketing

Areas of Expertise:

- Residential
- Commercial
- Investment
- Land and Condominium Sales

Professional Experience and Accomplishments

- FC Tucker
- Sabbagh Pickens
- Remax
- Griffin Realty

Education and Professional Development

- Hampton University
- Real Estate Sales Course
- Real Estate Broker Course
- Professional Development

Community Service

- Habitat for Humanity of Monroe County
- Windfall Dancers, Inc.
- Redevelopment Commisioner

MICHELLE ALLISON HENDERSON

1121 E. Calloway Street
Bloomington, IN 47401
mhenders@indiana.edu
(812)391-3233 (cell)

ACADEMIC DEGREES

Indiana University: Ph.D. in Curriculum Studies with focus on social education in primary grades. Graduation: December 2009. Recipient of Scrivner Award for Leadership in Elementary Education. GPA: 3.85.

Indiana University Purdue University: Indianapolis, Indiana. Master of Science degree in Social Psychology. Graduation: December 1987, GPA: 5.6.

Purdue University: Lafayette, Indiana. Bachelor of Arts degree, double-majoring in Psychology and in French. Graduation: May 1984, GPA: 5.4.

RELATED PROFESSIONAL EXPERIENCE

Project Coordinator: Global Learning Across Indiana; Ivy Tech Community College; January 2013 to present.

- Working with Ivy Tech faculty to internationalize courses through workshops and collaboration on development of a Global Learning Certificate

Extension Assistant Educator: Purdue Cooperative Extension. November 2011 to November 2012.

- Working with low income families in both individual and group settings for basic life skills instruction and consultation, primarily in the areas of nutrition and budgeting

Student Teacher Supervisor: Indiana University School of Education; January 2008 to present.

- Supervising student teachers placed in local schools and in surrounding counties

Co-Director: Writing Unlimited and Sisters of the Flying Fountain Pen, September 2005 to present

- Working with girls ages 8-15 to develop writing and leadership skills through writing circles, workshops, retreats, and summer camps

Family Literacy Coordinator: Clear Creek Elementary School; December 2002 to May 2005.

- Worked with administrators and teachers to increase parent involvement at Clear Creek
- Worked directly with students and parents to plan and implement service projects

Associate Instructor: Cultural Immersion Projects, Indiana University; January 2000 to December 2002.

- Worked with team to design curriculum and teach classes promoting cross-cultural understanding and communication for pre-service teachers preparing to student teach overseas for ten weeks

Workshop Administrator and Facilitator: First United Methodist Church; January 1999 to May 2000.

- Attended training workshop, coordinated and facilitated 12-week life skills course (Survival Skills For Women) for clients of local social service agencies.

Preschool Teacher: First United Methodist Church Preschool Program; August 1995 to December 1998.

- Worked with co-teacher to develop curriculum and programs for three and four year olds
- Planned and held parenting support/discussion classes for parents of preschool children

English Instructor: International English Center, University of Colorado; January 1991 to January 1993.

- Taught ESL classes (reading/writing/grammar) to international students (young adults)

Elementary School Teacher: Le Lycee Francais de Los Angeles, CA; August 1987 to June 1990.

- Taught English to second, third, and fourth grade international students
- Developed curriculum for all classes including reading programs, assessment, and ESL lessons

VITAE

Theresa A. Ochoa, Ph.D.
tochoa@indiana.edu
Phone: 812. 856.8135

School of Education
W.W. Wright Education Building Room 3268
201 North Rose Avenue
Bloomington, IN 47405-1006

EDUCATION

Ph. D. in Special Education University of California Santa Barbara	1999
BA in Psychology University of California Santa Barbara	1993

ACADEMIC APPOINTMENTS

Visiting Scholar Leiden University, Netherlands	Spring 2008
Visiting Scholar University of California Santa Barbara	Fall 2006
Associate Professor Indiana University	2006-Present
Assistant Professor Indiana University	2000-2006
Assistant Professor University of Wisconsin Whitewater	1999-2000

RELATED PROFESSIONAL EXPERIENCE

Multimedia Developer & Researcher CASELINK Project University of California Santa Barbara	1997-1999
K-8 Resource Specialist & Testing Director Crane School, Santa Barbara, CA	1997-1999
K-6 Elementary School Instructor Students with English Language Limitations and at-risk for academic failure Brandon Elementary School, Santa Barbara, CA	1994-1997
Child and Adult Behavior Specialist Holdsambeck & Associates, Santa Barbara, CA	1991-1994

UNIVERSITY TEACHING EXPERIENCE

K205: Introduction to Exceptional Learners, undergraduate

K305: Teaching the Exceptional Learner in the Elementary School, undergraduate
 K343: Education of the Socially and Emotionally Disturbed, undergraduate
 K361: Assistive Technology for Elementary School Students, undergraduate
 K520: Survey of Behavioral Disorders, graduate
 K505: Introduction to Special Education, graduate
 K780: Emotional and Behavioral Disorders Topical Seminar, doctoral
 K780: Paradigms & Policy in Special Education in the United States

DISSERTATION COMMITTEES

Tiffany Otero, Educational Psychology (Minor Advisor)	2011-Present
Maryellen McClain, Educational Psychology (Minor Advisor)	2011 – Present
Nantanoot Suwannawut, Information Science (Minor Advisor)	2009-Present
Barbara Bari, Special Education (Program Chair)	2009-Present
Lawrence Ruich, Special Education (Program Chair)	2008-2012
Jesse Rome-Stephens, Special Education (Member)	2008-Present
Robin Adair Johnson, Art Education (Member)	2007-2011
Holli Gottschall, Instructional Technology Systems (Member)	2004 – 2006
Herb Fiester, Instructional Technology Systems (Member)	2004 2010
Mary Kelly, Special Education (Program Chair)	2002 – 2008

PUBLICATIONS (in chronological order)

Ochoa, T. A. & Vaouli, P. (in press). Should Educators Have More Training in the Identification and Treatment of Internalizing Maladaptive Disorders? In Eckes, S. & C. J. Russo (Ed.), *Encyclopedia of Education Law*. Thousand Oaks, California: Sage Publications.

Ochoa, T. A. & Rogers-Adkinson, D. (in press). Are Positive Behavioral Interventions and Supports Effective at Reducing Misbehavior in Students with Behavior Disorders? In Eckes, S. & C. J. Russo (Ed.), *Encyclopedia of Education Law*. Thousand Oaks, California: Sage Publications.

Rogers-Adkinson, D. L., Ochoa, T.A., Weiss, S. L. (2012). English language learners and emotional behavioral disorders. In Jeffrey P. Bakken, Festus E. Obiakor, Anthony F. Rotatori (eds.) *Behavioral Disorders: Identification, Assessment, and Instruction of Students with EBD (Advances in Special Education, Volume 22)*, Emerald Group Publishing Limited, pp.151-171

Tan, P., Vaouli, P., & Ochoa, T.A. (fall 2011). Emotional and behavioral disorders: Promoting prevention and positive interventions in school settings. Center for Evaluation and Education Policy, Indiana University, 9(5), 1-12.

Ochoa, T.A. (2011). Bilingual special education. In C.J. Ovando, & M.C. Combs (Eds.), *Bilingual and ESL classrooms* (5th ed., pp. 367-395). Boston: McGraw Hill.

Ochoa, T.A., & Rome, J. (2009). Considerations for arrests and interrogations of suspects with hearing, cognitive, and behavioral disorders. *Law Enforcement Executive Forum*, 9(5), 127-134.

Strijbos, J., Ochoa, T.A., Sluijsmans, D.M.A, Segers, M.S.R, & Tillema, H.H. (2009). Fostering interactivity through formative peer assessment in web-based collaborative learning environments. In Constantinos Mourlas, Nikos Tsiamos, & Panagiotis Germanakos, *Cognitive and Emotional Processes in Web-based Education: Integrating Human Factors and Personalization*.

Ochoa, T.A. (2008). Assistive Technology; Individualized Education Program; Manifestation Determination. In C. J. Russo (Ed.), *Encyclopedia of Education Law*. Thousand Oaks, California: Sage Publications.

Ochoa, T.A. (2006). A special kind of diversity: Students with disabilities in higher education. In G. Brown & M. Howard-Hamilton (Eds.), *Unleashing suppressed voices on college campuses: Diversity issues in higher education and student affairs* (pp. 191-197). New York: Peter Lang Publishing USA.

Ochoa, T.A., & Leafstedt, J.M. (2006). Computer-supported problem-based learning for the preparation of teachers of students with disabilities. In M. Girod & J. Steed (Eds.), *Special series on technology in the college classroom* (pp. 129-149). New Forum Press.

Ochoa, T.A. (2005). Bilingual special education. In C.J. Ovando, M.C. Combs, & V.P. Collier (Eds.), *Bilingual and ESL classrooms* (4th ed., pp. 358-384). Boston: McGraw Hill.

Ochoa, T.A., & Eckes, S. (2005). Urban youth in correctional facilities: Segregation based on disability and race. *Education and Urban Society*, 38(1), 21-34.

Eckes, S., & Ochoa, T.A. (2005). Students with disabilities: Transitioning from high school to higher education. *Journal of American Secondary Education*, 33(3), 6-20.

Ochoa, T.A., & Robinson, J. (2005). Revisiting group consensus: Collaborative learning dynamics during a problem-based learning activity in education. *Teacher Education and Special Education*, 28(1), 10-20.

Ochoa, T.A., Kelly, M.L., Stuart, S., & Rogers-Adkinson, D. (2004). The impact of PBL technology on the preparation of teachers of English language learners. *Journal of Special Education Technology*, 19(3), 35-45.

Ochoa, T.A., Gottschall, H., & Stuart S. (2004). Group participation and satisfaction: Results from a PBL computer-supported module. *Journal of Educational Multimedia and*

Hypermedia, 13(1), 73-91.

Ochoa, T.A. (2003). Bilingual special education. In C.J. Ovando, V.P. Collier, & M.C. Combs (Eds.) *Bilingual and ESL Classrooms* (3rd ed., pp. 358-378). Boston: McGraw Hill.

Polsgrove, L., & Ochoa, T.A. (2003). Trends and issues in behavioral interventions. In A.M. Sorrells, H.J. Rieth, & P.T. Sindelar (Eds.), *Critical issues in special education: Access, diversity, and accountability* (pp. 154-179). Pearson Allyn & Bacon.

Rogers-Adkinson, D., Ochoa, T.A., & Delgado, B. (2003). Developing cross cultural competence in serving families with children with significant developmental needs. *Journal of Autism and Developmental Disorders*, 18, 4-8.

Ochoa, T.A. (2002). An interactive multimedia problem-based learning CD ROM for teacher preparation: IDEA-97 guidelines for disciplining students with disabilities. *Journal of Special Education Technology*, 17(2), 39-45.

Ochoa, T.A., Gerber, M.M., Leafstedt, J.M., Hough, S., Kyle, S., Rogers-Adkinson, D., & Koomar, P. (2001). Web technology as a teaching tool: A multicultural special education case. *Journal of International Forum of Educational Technology & Society*, 4(1), 50-60.

Ochoa, T.A., Vasquez, L.R., & Gerber, M. M. (1999). New generation of computer-assisted learning tools for students with disabilities. *Intervention in School and Clinic*, 32(4), 251-254.

RESEARCH REPORTS

Plucker, J., Spradlin, T., Eckes, S., Ochoa, T.A., Toutkoushian, R., Michael, B., Williamson, G., Hansen, J., Trotter, A., Zaph, J., Chien, R., & Jackson, R. (2006). *Special education service delivery in Indiana: Final report*. Center for Evaluation and Education Policy, Indiana University.

Ochoa, T.A. & Exter, M. (2006). *DyKnow Vision in an assistive technology special education teacher preparation course: Final report*. Indiana University School of Education.

Ochoa, T.A., Kelly, M., & Londergan, M. (2005). Kurzweil 3000 as a tool to improve self-concept, reading fluency, and comprehension skills of students with reading related disabilities or at-risk for reading problems. (Tech. Rep. No. 1). Indiana University School of Education.

MULTIMEDIA DEVELOPMENTS

Ochoa, T.A. (in progress). Special education in correctional facilities. Introductory level

videotape for educators.

Ochoa, T.A. (in progress). Special education in correctional facilities: Interactive multimedia program for educators. Indiana University.

Ochoa, T.A. (2005). Law & Disorder: An Undergraduate Special Education Law Journal. <https://scholarworks.iu.edu/dspace/handle/2022/186>

Ochoa, T.A. (2005). Collaborative decision-making in PBL simulations. Electronic Portfolio. <http://www.courseportfolio.org/peer/pages/index.jsp> (login: portfolio, password: pfolpass)

Ochoa, T.A. (2003). Disabilities and school discipline. Interactive, multimedia program for teachers. Indiana University. <http://www.indiana.edu/~k305to/intro.html>

Ochoa, T.A. (2002). Welcome home: Designing for universal access. Introductory level videotape for teachers. Distributed by Indiana Institute on Disability and Community.

Leafstedt, J., Ochoa, T.A., & Gerber, M.M. (2000) Case III: Story of Andres. *CASELINK - web-based interactive, multi-media programs for teachers*, University of California Santa Barbara <http://www.caselinks.education.ucsb.edu/caselink>

RESEARCH PROJECT, GRANTS OBTAINED FOR RESEARCH, & DEVELOPMENT ACTIVITIES

(in chronological order, * = with graduate student, ** with undergraduate student)

Ochoa, T.A. (December 2011). Helping offenders prosper in employment (HOPE). Research grant proposal submitted to the Proffitt Internal Grant Competition. Decision pending.

Ochoa, T.A., Fontaine, N., & Mank D. (June 2011). Exploring the brains, needs, and potential of incarcerated youth with disabilities. Research grant proposal submitted to the Faculty Research Support Program. Not funded.

Ochoa, T.A. (2006). Law & Disorder. *Lazerwitz Special Education Enrichment Fund*.

Robinson, J., Schlegel, W., Ochoa, T.A., Pescosolido, B., & Hamburger, M. (2006). Building the commons: Scholarship of teaching & learning inquiry communities. *Carnegie Academy for the Scholarship of Teaching and Learning Leadership Program*.

Ochoa, T.A. & Rosenbaum, H. (2006). Cross-disciplinary research on collaborative learning: A critical examination of group instructional approaches. *Indiana University Scholarship of Teaching & Learning Leadership Award Competition*.

** Bier, A., Doddridge, J., Fuda, K., & Reinking, J. & Ochoa, T.A. (2004). Law & Disorder Journal. *Undergraduate Research and Creative Partnerships*.

Butera, G., Ochoa, T.A., & Eckes, S. (2004). At the crossroads: NCLB and IDEA's impact on Indiana's children. *Indiana University School of Education Committee on Teacher Education Research on Standards and Assessment*.

- ** Fish, A., & Ochoa, T.A. (2003). Exploring children's cultural awareness. *Undergraduate Research and Creative Partnerships*. (Faculty Mentor).
- * Ochoa, T.A. (2003). Project SAMMY (Self-authoring Multimedia for Youth). *United States Department of Education Research and Innovation to Improve Services and Results for Children with Disabilities Student-Initiated Research Projects*. (Official Project Director).

This competition requires that I be the official person of record. The grant was awarded to Mary Kelly, one of my doctoral students.

Ochoa, T.A. (2002). Research in professional preparation: Assessing problem-based learning's impact on undergraduate teaching and learning. *Indiana University Scholarship of Teaching and Learning Academy*.

Ochoa, T.A. (2002). Development of disabilities and school discipline module. *Indiana Higher Education Telecommunications System*.

Ochoa, T.A. (2001). Improving the educational outcomes for students with disabilities and diverse learning and behavioral characteristics through research in teacher preparation. *Indiana University School of Education Proffitt Grant*.

Ochoa, T.A. (2001). Dissemination of the results of and refinement of the measuring tool used to determine the effectiveness of a multicultural special education case CD ROM for teaching pre-service teachers about the referral to special education process for Hispanic students who are limited in English proficiency. *Indiana University School of Education Proffitt Grant*.

- * Ochoa, T.A., Sheu, F. (2001). Improving the preparation of teachers for limited English proficient students through a multicultural special education CD ROM: A collaborative IU faculty/student research. *Indiana University Scholarship of Teaching and Learning Grants Competition*.

Ochoa, T.A. (2000). Development of an interactive multidisciplinary problem-based learning CD ROM to increase preservice teachers' knowledge acquisition of behavior disorder content and improve instruction of students with behavior disorders. *Ameritech Fellows Program*.

Ochoa, T.A. (2000). Empirical evaluation of the efficacy of a multicultural special education case CD ROM for teaching preservice teachers about the referral to special education process for Hispanic students who are limited in English proficiency. *Indiana University Department of Education Proffitt Grant Competition*.

Ochoa, T.A., & Rogers-Adkinson, D. (1999). Portable Reflective-Teaching Project Faculty Research Grant. *University of Wisconsin Whitewater*.

- * Ochoa, T.A., Constein, D., & Anderson, K. (1999). Portable Reflective-Teaching Project Undergraduate Student Research Grant. University of Wisconsin Whitewater.

Ochoa, T.A. (1998). The effects of a cognitive behavior intervention on perceptions of disruptive students' teachability. *University of California, Santa Barbara Pregraduate Mentorship Funding Program*.

PROFESSIONAL PRESENTATIONS

(* = with graduate student, ** = with undergraduate student)

Vaiouli, P., & Ochoa, T. (2011, March). *School based treatments for students with depression*. Conference presentation presented at Special Education Research Seminar. Bloomington, IN.

Ochoa, T.A. (2007, July). *Considerations for arrests and interrogations of suspects with cognitive, psychological, and behavioral disabilities in the United States*. Paper presented to the Charles Sturt New South Wales Police College. Sydney, Australia.

Ochoa, T.A. (2007, July). *Considerations for arrests and interrogations of suspects with cognitive, psychological, and behavioral disabilities in the United States*. Paper presented to the Parramatta New South Wales Police Headquarters. Sydney Australia.

Ochoa, T.A. & Robinson, J. (2007, July). *Potential and Challenges of Peer Assessment in Collaborative Learning Contexts*. Paper presented at the International Society for the Scholarship of Teaching and Learning. Sydney, Australia.

- * Exter, M. & Ochoa, T.A. (2007, April). *The use of an interactive note-taking system: A pilot study in a teacher education course*. Poster session presented at the annual meeting of the American Educational Research Association: The World of Educational Quality. Chicago, Illinois.

- * Ochoa, T.A. Steinmetz, J., & Rome, J. (2007, April). *Increasing police officers' understanding of disabilities and the laws that govern arrests and interrogations of individuals with cognitive, mental, and behavioral disorders*. Paper presented at the annual meeting of the Police Executive Symposium: Urbanization and Security. Dubai, United Arab Emirates.

Ochoa, T.A. (2006, November). *The changing role of the instructor and the student in the context of PBL Learning*. Symposium presented at the annual meeting of Council for Exceptional Children Teacher Education Division. San Diego, California.

Ochoa, T.A. (2006, November). *Discipline and IDEA 2004: Potential impact of new regulations*. Presentation at the annual meeting of the Teacher Educators of Children with Emotional and Behavioral Disorders. Tempe Arizona.

Ochoa, T.A., & Eckes, S. (2005, August). *Including students with disabilities in higher education: Understanding students, their educational needs, and the law*. Poster session presented at the annual meeting of the Inclusive & Supportive Education Conference, Glasgow, Scotland.

Eckes, S., Mirksch, K., Daniel, TK., Gooden, M., Brown, L., & Ochoa, T.A. (2005, April). *The overrepresentation and under representation of minorities: We are still segregated beyond the K-12 public schools*. Paper presented at the meeting of the American Educational Research Association, Montreal, Canada.

** Ochoa, T.A., & Eckes, S., & Kerkoff, E. (2004, November). *Legal issues and special education in correctional facilities: A perspective from within*. Paper presented at the annual meeting of the Education Law Association, Tucson, AZ.

Ochoa, T.A., & Eckes, S. (2004, November). *One, two, three strikes, you're out: Impact of NCLB, IDEA reauthorization, & zero tolerance on suspension and expulsion of students with behavior disorders*. Paper presented at the annual meeting of the Teacher Educators of Children with Behavior Disorders Conference, Tempe, AZ.

Ochoa, T.A., & Robinson, J. (2004, October). *Rethinking consensus: Group work and the dynamics of decision-making*. Paper presented at the annual meeting of the International Society for the Scholarship of Teaching and Learning, Bloomington, IN.

** Ochoa, T.A., & Allen, M. (2003, October). *What type of bruises do abuse and neglect leave on children with disabilities?* In-service presented to Case Appointed Special Advocate (CASA), Bloomington, IN.

* Ochoa, T.A., Duffy, T., & Gottschall, H. (2003, December). *Problem-based learning technology in teacher preparation*. Paper presented at the annual meeting of the Multimedia & Information & Communication Technologies in Education, Badajoz, Spain.

Ochoa, T.A. (2003, January). *Problem-based learning technology in teacher preparation: How to measure its impact on learning?* Unpublished manuscript, School of Education Research Colloquium, Indiana University.

Ochoa, T.A. (2003, February). *Preparing preservice teachers to conduct a manifestation determination*. Paper presented at the annual meeting of the Midwest Symposium for Leadership in Behavior Disorders, Kansas City, MO.

Ochoa, T.A. (2003, February). *Disabilities & school discipline: A PBL computer-assisted module*. Paper presented at the annual meeting of the Midwest Symposium for Leadership in Behavior Disorders, Kansas City, MO.

Ochoa, T.A. (2003, April). *Manifestation determination: A problem-based learning simulation for pre-service teachers*. Paper presented at the annual meeting of the Council

for Exceptional Children, Seattle, WA.

Ochoa, T.A., & Leone, P. (2002, November). *Special education in correctional facilities: A perspective from within*. Paper presented at the annual meeting of the Teacher Educators of Children with Behavior Disorders, Tempe AZ.

Polsgrove, L., & Ochoa, T.A. (2002, November). *The state of teacher training in EBD and recommendations for the future*. Paper presented at the annual meeting of the Teacher Educators of Children with Behavior Disorders, Tempe AZ.

Ochoa, T.A. (2002, October). *Preparing teachers for real-life problems: Potential and challenges of the problem-based learning approach*. Unpublished manuscript, School of Education Curriculum & Instruction Collaborative, Indiana University.

- * Ochoa, T.A., Sheu, F., & Shih, M. (2002, January). *An interactive multimedia problem-based learning CD ROM: Providing knowledge and simulation of the IDEA 97 manifestation determination process to student teachers*. Paper presented at the annual meeting of the Educational Media World Conference on Educational Multimedia, Hypermedia & Telecommunications Systems and Resources, Denver, CO.
- * Sheu, F., Shih, M. Weng, A., & Ochoa, T.A., (2002, January). *Users' interface satisfaction of an interactive multimedia problem-based-learning module*. Educational Media World Conference on Educational Multimedia, Hypermedia & Telecommunications Systems and Resources, Denver, CO.
- * Ochoa, T.A., & Sheu, F. (2002, March). *Bridging the research to practice divide in teacher preparation through problem-based learning multimedia CD ROM technology*. Unpublished manuscript, Scholarship of Teaching and Learning Program, Indiana University.

Ochoa, T.A. (2001, November). *IDEA-97 discipline guidelines: Providing knowledge and simulation of the manifestation determination process to student teachers through an interactive multimedia problem-based learning CD ROM*. Paper presented at the annual meeting of the Teacher Educators of Children with Behavior Disorders, Tempe, AZ.

Ochoa, T.A., (2001, February). *Improving teachers' perceptions of student teachability through bias awareness and teaching opportunities*. Paper presented at the annual meeting of the Midwest Symposium for Leadership in Behavior Disorders, Kansas City, MO.

Gerber, M.M., Leafstedt, J. & Ochoa, T.A. (2001, February). *Using web-based hypermedia to deliver just-in-time training resources to teachers of students with behavior disorders*. Paper presented at the annual meeting of the Midwest Symposium for Leadership in Behavior Disorders, Kansas City, MO.

Ochoa, T.A. (2000, February). *Portable Reflective-Teaching Project (PREP): Web-based pre and in-service training for teachers of students with behavior problems*. Paper presented

at the annual meeting of the Midwest Symposium for Leadership in Behavior Disorders, Kansas City, MO.

** Ochoa, T.A., Gorman, R. & Tapia, J. (1998, September). *The effects of a cognitive behavior intervention on perceptions of disruptive students' teachability*. Paper presented at the annual meeting of the Virginia Beach Conference of the Commonwealth Institute for Child and Family Studies, Norfolk, VA.

Ochoa, T.A. (1997, November). *The effects of cognitive behavior interventions on teachers' perceptions of and academic expectations for students nominated as disruptive*. Paper presented at the annual meeting of the Teacher Educators of Children with Behavior Disorders, Scottsdale, AZ.

Ochoa, T.A. (1997, October). *Can cognitive behavior interventions unmask true potential in bright students with learning disabilities?* Paper presented at the annual meeting of the International Conference of the Council for Children with Behavioral Disorders, Irving, TX.

SERVICE

INDIANA UNIVERSITY

School of Education Agenda Committee	2009-Present
School of Education Policy Council	2009-Present
School of education Faculty Affairs and Budgetary Affairs Committee	2009-Present
School of Education Elementary Education Council	2008-Present
Coordinator Special Education Program	2008-Present
K205/K305/K306 Course Coordinator	2006-Present
Director of Teaching All Learners Program	2006-2008
School of Education Dissertation Award Committee	2007
Special Education Program Clinical Search Committee	2007
School of Education Policy Council	2005-2006
Indiana University Faculty Policy Council	2005-2007
IUPUI Special Education Faculty Search Committee	2004
School of Education Research, Development & Equipment Committee	2004
School of Education Electronic Annual Review Ad Hoc Committee	2004
Indiana University School of Education Policy Council	2002-2004
Ameritech Fellows 4 th Round Grant Reviewer.	2002-2003

School of Education Dean's Survey Committee	2002
School of Education Language Education Faculty Search Committee Member	2002
School of Education Special Education Faculty Search Committee Member	2002
School of Education Science Faculty Search Committee Member	2002
School of Education Laptop Program Committee	2002-2004
Distinguished Alumni Awards Committee Member	2001-2004
School of Education Teaching All Learners Program Committee Member	2000-2008
 <u>NATIONAL & INTERNATIONAL</u>	
Reviewer for <i>Journal of Special Education Technology</i>	2004-Present
Reviewer for <i>Exceptional Children</i>	2004-Present
Reviewer for <i>Behavioral Disorders</i>	1999 - Present
Division for Research Council for Exceptional Children Website Committee	2004
Division for Research Secretary Council for Exceptional Children	2002-2004
Midwest Symposium for Leadership in Behavioral Disorders	1999-Present
Swiss Parliament EXCHANGE FOR PEACE Program. United States Delegation Leader and Coordinator	1999

PROFESSIONAL ASSOCIATIONS

Council for Exceptional Children
 Division of Teacher Education
 Division for Research
 Division of Emotional and Behavioral Disorders

Biography

Theresa A. Ochoa, Ph.D is an Associate Professor at the Indiana University School of Education where she has taught and conducted research for 13 years in the areas of behavioral disorders, technology, and teacher preparation. She teaches courses at the undergraduate, masters, and doctoral level, focusing primarily on introducing special education majors to disability laws that govern the education and treatment of learners with cognitive and behavioral exceptionalities. She currently coordinates all introductory

courses in the special education program for all education majors and she acted as Director of the Teaching All Learners Program, a dual certification program in the school of education. Her current research takes places in correctional facilities and assesses the number and quality of differentiated services provided to youth with disabilities while in confined settings and seeks to increase the transition to work programs for incarcerated youth. Her main contribution in the charter school proposal sought in this application is to provide consultation in the special education realm.

Brandi L. Smith

1314 E. Fairwood Drive
Bloomington, IN 47408
blsmith2@indiana.edu
(812) 272-6358

WORK EXPERIENCE

Adjunct Lecturer, Human Development and Family Studies, December 2013-present

Department of Applied Health Sciences, School of Public Health, Indiana University, Bloomington IN

- “Marriage and Family Interaction” lecture and discussion format class of 100 undergraduates
- Write class lectures, organize and implement small group activities, oversee undergraduate discussion leaders

Internship in Human Development and Family Studies, Indiana University, January-April, 2012

Circles Initiative, South Central Community Action Program, Bloomington, IN

- Youth Community Coordinator
- Design personal and family food resources for individuals and families living in poverty
- Case management support

Essential Balance, Bloomington, IN, May 2002- October 2011

Certified Massage Therapist

- Part time massage therapist practicing in-home therapy
- Small business duties such as maintaining accounting records, marketing, and clinical massage treatment

Hoosier Hills Food Bank Garden and Gleaning Program, September 2010- August 2011

Program Assistant

- Volunteer Recruitment and donation solicitation
- Public Speaking to promote program within Bloomington community
- Garden maintenance

Nature’s Crossroads Earth Friendly Seeds, January-April 2011

Freelance Curriculum Design

- Designed “Pioneer Gardens” curriculum unit for school seed sale fundraiser
- Presentation of fundraiser in school classrooms

Work at Home Mother and Mini-Farmer, July 2000- October 2010

Four Fawns Hill, Bloomington, IN

- Maintain household according to holistic and sustainable principles
- Renovated 1.5 acres forest land into mini farm to supply our family’s produce and eggs
- Homeschooled eldest child for two years while participating in a cooperative group that grew out of Sycamore Spring Waldorf School (see below)

- Organized Practical Waldorf At Home, a parenting and homeschooling workshop, on behalf of workshop facilitator, Donna Simmons of Christopherus Homeschooling Resources

John Waldron Arts Center, Bloomington, IN, 1997-2001

Ceramics Teacher for Adults and Children

- Taught adult and children fundamental skills in ceramics
- Designed projects for individuals and coordinated class curriculum

Tina's Catering and Cuisine, Bloomington, IN, July 1999- 2000

Baker and Cook

- Commercial kitchen food preparation

Hamilton Southeastern Schools, Fishers, IN, January 1999- June 1999

English as a Second Language Assistant

- Worked with high school students individually and in classroom to develop English skills

Indiana University, Fundamentals of Three Dimensional Design, January 1998- May 1998

Teaching Assistant

- Shadowed Professor Georgia Strange, teaching college level art course for undergraduates

VOLUNTEER EXPERIENCE

The Green School, formerly known as Green Meadows Charter School, April 2012- Present

Founders Group Member

- Co-write Proposal Document for progressive holistic education model
- Parent and community outreach
- Education for Sustainability curriculum design

Bloomington Food Policy Council, January 2010- May 2012

Education Working Group Co-Chair

- Manage agendas, run group meetings
- Organize educational events and projects on behalf of council at large

Bloomington Winter Farmers Market, Bloomington, IN, March 2008 to December 2009

Consumer Advisory Council Member

- Steer and promote the Winter Market via monthly council meetings
- Participation in writing grant application for USDA Farmers Market Promotion Program, taking customer surveys, and workshop panels

Sycamore Spring Waldorf School, Bloomington, IN, September 2003- May 2006

Founding Family and Council Member

- 1 of 5 founding families that ran a cooperative Waldorf Preschool
- Volunteer position included service on administrative parent council for 3 years
- Organized fundraising events such as creating, making and selling goods annually for Holiday Market, and a May Day Festival

Free Lance Workshop Facilitator and Coordinator

- *Eating Healthy on a Budget, and Pantry Primer*; a food choice series presented at Mother Hubbard's Cupboard, October 2010
- *Healthier Eating*, food education class presented at St. Mark's Nursery School, October 2009
- *Practical Waldorf At Home*, coordinated workshop facilitated by Donna Simmons of Christopherus Homeschool Resources, August 2006
- *Body Awareness Movement*, series of classes at Associates of Integrative Health, Fall 2002
- *Birth Art*; art class for postpartum mothers processing birth experiences, Spring 2001

Formal Education

M.S. in Human Development and Family Studies, August 2012

Department of Applied Health Sciences; School of Public Health; Indiana University, Bloomington

- Research on the overlaps of systems thinking and human development in a Human Ecological Systems Theory with program design for sustainable personal, family, and community health promotion

500 hours Massage Therapy training, May 2002, *Associates of Integrative Health, Bloomington, IN*

B.A. Spanish and Studio Art, December 1998, *Indiana University, Bloomington, IN*

- Spanish Honors Student, wrote and researched thesis on "Feminine Psychology in the Trilogy of Francisco Garcia Lorca," 1998

Informal Education

- Grow Organic Educator, City of Bloomington People's University, 2007
- Polarity Therapy, 250 contact hours training with Donna Cooney, RPP, NCTMB, 2004

Affiliations, Awards, and Activities

Affiliations

- Member of the National Council on Family Relations
- Member of Local Growers Guild, Bloomington, IN

Awards

- Graduated Cum Laude, honors in Spanish, Indiana University, 1998
- Founders Day Scholar, Indiana University, consecutive fall and spring semesters 1995-1998
- "High Academic Achievement" University of Illinois, Chicago, Summer 1997, in conjunction with Universidad de Guanajuato and Indiana University Department of Overseas Study

Activities

- Travel, immersion, and Spanish language and Mexican Art History study, Universidad de Guanajuato, Guanajuato, Mexico, summer 1997
- Sustainable Home Economist, specializing in home food production employing sustainable methods

References

Available upon request

RESUME

Deborah C. Wilkin, LCSW
455 Wylie Farm Rd.
Bloomington, IN. 47401
dcwilkin3@yahoo.com

Experience

2006-Current Full-time: PhD student in Clinical Psychology; **Part-time:** private psychotherapy, consulting

1997-2006 Therapist, Bloomington Meadows Psychiatric Hospital, Bloomington, IN. (PRN/part-time) A 75 bed Acute Care and RTC Psychiatric Hospital. Performed intake assessments and direct psychotherapy, both individual and group, with children, adolescence and adults.

1994-2004 Director, Positive-Link, Public Health Nursing Association Inc. and Bloomington Hospital, Bloomington, IN. Responsible for development and administration of the HIV Case Management and Health Education/Risk Reduction Educational Program. Responsibility included, grant writing and maintenance, quality assurance, program and policy development and planning and fiscal management, and staff supervision and development. Prior to 1999, also supervised the LCSW social workers in the agency's home health care program.

1996-2003 Field Instructor, and Adjunct Faculty IUPUI and Indiana University, Bloomington, IN. Supervised MSW students in their first and second year field placement experiences. Monitored individual learning plans and trained students in specific social work skills, and evaluated progress and performance. Also, taught two master level academic courses.

1992-1994 Therapist and Partner, Professional Weight Management Inc., Fort Myers, FL. Owner, partner and responsibilities included providing individual psychotherapy for medically-complicated patients involved in a physician directed weight loss program.

1987-1992 Director, Medical Social Work, Southwest Florida Regional Medical Center, Fort Myers, FL. A 400 bed acute care medical-surgery hospital. Responsible for: planning, policy, procedure and program development, fiscal management, quality assurance and administration for the Medical Social Work Department. Provided supervision of the Social Work staff for acute care hospital and outpatient Kidney Dialysis and Renal Transplant programs. Developed state of the art quality assurance program. Prepared department for JCAHO accreditation examination. Consulted with area hospitals to improve their quality assurance programs in preparation for JCAHO and or CARF certification.

1987-1993 Adjunct Faculty, Barry University, Miami FL. Supervised MSW students in their first and second year field placements. Developed individual learning plans and trained students in specific medical social work skills, and evaluated their progress and performance

1987-1989 Supervisor, Rehabilitation Social Work, Lee Memorial Hospital Rehabilitation Center, Ft. Myers, Fl. Responsible for the social work program start-up including development of policy and procedure and Quality Assurance program. Duties included assessment, treatment planning, individual, and family and group counseling, family team facilitation, case management and discharge planning. Prepared department for CARF certification.

1986-1987 Medical Social Worker, Lee Memorial Hospital, Fort Myers, Fl. Responsible for psychosocial assessment and treatment planning, case management, crisis intervention, individual and group counseling (cardiac, neuro and ortho education and support groups), education and consultation referral and discharge planning.

1982-1985 Child Protective Services Specialist II, Texas Department of Human Services, Denton, TX. Position based on generic-county model. Was responsible for intake/investigation and on-going case management and clinical treatment planning services. Duties included assessment, treatment planning, individual and group therapy with sexual abuse perpetrators, their victims and families when reunification was the treatment goal. Significant involvement with both medical and judicial processes.

Education

2007- Current: PhD., Walden University, Minneapolis, MN. Performing course and field work toward a PhD in Clinical Psychology.

1977-1979 M. S. W., The Ohio State University, Columbus, Ohio. Administrative and direct service field placement experience. Lacked 3 credit hours for a dual degree in Public Administration.

1975-1977 B.A., The Ohio State University, Columbus Ohio.

1974-1975 Hunter College of the City of New York, New York City, New York. Performed course work toward the BA degree

1973-1974 Hanover College, Hanover, Indiana. Performed course work toward a Liberal Arts degree

1972-1973 Oklahoma College of Liberal Arts, Chickasha, Oklahoma. Performed course work toward a Liberal Arts degree. Honor Role.

Professional Affiliations

Licensed Clinical Social Worker, State of Indiana; Member (elected) of the State Board of Directors, Florida Chapter, National Association of Social Workers; Past Chair (elected) and Member Southwest Region, Florida Chapter, NASW; Member, Society of Hospital Social Work Directors

Community Involvement

Indiana State Department of Human Resources HIV/AIDS Advisory Board; Monroe County Community School Corporation, AIDS Advisory Board; National Association of Social Workers, Board of Directors, Florida Chapter as well as the NASW Southwest Region Chair; NASW Community liaison for Florida State Department of Health and Human Resources, Mentor Committee; AGELINK Board of Directors; Advisory Boards for Lutheran Ministries, Upjohn and ABC Home Health Agencies; Co-Founder Guardianship Association of Southwest Florida.

MARY BARR GORAL
2517 Country Club Road
Nashville, IN 47448
502-553-0614
drmarygoral@gmail.com

EDUCATION

Ph.D., Curriculum Studies and Mathematics Education, Indiana University, Bloomington, Indiana. February, 1997. Dissertation: *Transformational Possibilities of Schooling: A Study of Waldorf Education*. Director: Jesse Goodman

Endorsement in Gifted and Talented Education, Indiana University, Bloomington, Indiana, 1989.

M.S., Elementary Education, Indiana University, Bloomington, Indiana, 1985.

B.S., Elementary Education, Indiana University, Bloomington, Indiana, 1981.

PROFESSIONAL EXPERIENCE

Indiana University, Bloomington, IN, Adjunct Professor, 2011 -

Kentahen Teacher Training, Education Director, Louisville, KY, 2005-

Transformational Teaching, Educational Consultant, 2002 –

Bellarmino University, Louisville, KY, Associate Professor, 2007 – 2010.

Bellarmino University, Louisville, KY, Assistant Professor, 2003-2007.

Mount Mary College, Milwaukee, WI, Instructor & Director Great Lakes Teacher Training, December 2001 – 2004.

Prairie Hill Waldorf School, Pewaukee, WI, 7th and 8th Grade Teacher, 2000 - 2002.

Mount Mary College, Milwaukee, WI, Director of Early Childhood/Elementary/Middle Education, 1999-2001.

Mount Mary College, Milwaukee, WI, Assistant Professor, 1998-2001.

Hanover College, Hanover, IN, Assistant Professor, 1997-1998.

Hanover College, Hanover, IN, Instructor, 1995-1997.

Monroe County Community School Corporation, Bloomington, IN. Elementary School Teacher, 1984-1995.

Indiana University, Bloomington, IN. Associate Instructor, Student Teaching Supervisor, 1994-1995.

Indiana University, Bloomington, IN. Graduate Assistant, Javitz Grant for Rural Gifted Students, 1993-1994.

Indiana University, Bloomington, IN. Associate Instructor, Mathematics and Science Early Field Experience, 1992.

BOOKS PUBLISHED

Goral, M. (2009). *Transformational teaching: Waldorf-inspired methods in the public school*. NY: Steiner Books.

PEER REVIEWED PUBLICATIONS

Goral, M. (2010). Teacher support and revival of twelve case studies in Waldorf-inspired public schools. March 2010. *Encounter: Education for Meaning and Social Justice*.

Goral, M. (2009). From kinesthetic movement to algebraic functions. *Mathematics in the Middle School*. 14(7), 388-391.

Goral, M. (2009). Teaching sustainability through science: One method's class experience and journey. *Community Works Journal*.

Goral, M. & Gilderbloom, P. (2008). You couldn't find this in a store! Using measurement skills to make felt pencil cases. *Australian Primary Mathematics Classroom*. 13(7), 23-27.

Goral, M. & Wiest, L. (2007). An arts based approach to teaching fractions. *Teaching Children Mathematics*, 14(2), 74-80.

Goral, M. (2006). Education for a sustainable future: Creating environments where students can learn. *Democracy & Education*, 16(3), 25-28.

Goral, M., Bucalos, A., Gnadinger, C., & Norris, M. (2006). The courage to teach: Reflections on renewal. *Encounter: Education for Meaning and Social Justice*, 19(2), 45-51.

Goral, M. & Gnadinger, C. (2006). Using storytelling to teach mathematics concepts. *Australian Primary Mathematics Classroom*, 11(1), 4-8.

Goral, M. (2000). A connective pedagogy. *Paths of Learning*, 2 (6), 54-60.

Goral, M. & Chlebo, J. (2000). Where's Waldorf? *Encounter*, 13 (3), 43-52.

Wiest, L. & Sturbaum, M. (1996). Need problem solving ideas? Take a trip! *School, Science, & Mathematics*, 96(4), 187-191.

Sturbaum, M. (1994). From community service to social action: One fourth grade classroom's journey. *Democracy and Education*, 9 (2), 29-30.

Instructional Materials

Adair, D., Anderson, S., Carter, J., Hamilton, W., Nordmann, N., Shiffrin, S., Stuckey, K., Sturbaum, M., Svetcoff, P., Wischler, D., Wischler, M. Wood, R. (1987). *Teachers teaching teachers to implement "Minds-On" elementary science*. Prepared with support from the Indiana Department of Education and the Education for Economic Security Demonstration and Exemplary Programs.

FUNDED GRANTS

Goral, M. (2013). *Waldorf-inspired Project*. Proposal submitted to the Norton Foundation. Amount funded: \$60,000.00

Goral, M. (2012). *Waldorf-inspired Project*. Proposal submitted to the Norton Foundation. Amount funded: \$60,000.00

Goral, M. (2011). *Waldorf-inspired Project*. Proposal submitted to the Norton Foundation. Amount funded: \$65,000.00

Goral, M. (2010). *Waldorf-inspired Project*. Proposal submitted to The Norton Foundation. Amount funded: \$60,000.00.

Goral, M. (2009). *Waldorf-inspired Project*. Proposal submitted to The Norton Foundation. Amount funded: \$65,000.00.

Goral, M. (2008). *Waldorf-inspired Project*. Proposal submitted to The Norton Foundation. Amount funded: \$65,946.00.

Goral, M. (2007). *Waldorf-inspired Project*. Proposal submitted to The Norton Foundation. Amount funded: \$59,229.03.

Goral, M. (2006). *Waldorf-inspired Project*. Proposal submitted to The Norton Foundation. Amount funded: \$46,713. 03.

Goral, M. (2005). *JCPS Waldorf-inspired Project*. Proposal submitted to The Norton Foundation. Amount funded: \$39,508.00.

Imes, M. & Goral, M. (2003). *Great Lakes Teacher Training*. Proposal submitted to The Bader Foundation, Milwaukee, WI. Amount funded: \$20,000.00.

Goral, M. (2000). *Faculty Development Project*. Proposal submitted to Mount Mary College. Amount funded: \$2,000.00.

Goral, M. (1999). *Faculty Development Project*. Proposal submitted to Mount

Mary College. Amount funded: \$600.00.

Goral, M. (1998). *Scholarship and Travel Grant*. Proposal submitted to Faculty Hanover College. Amount funded: \$500.00

Sturbaum, M. (1997). Faculty International Study Trip. Proposal submitted to Hanover College. Amount funded: \$3,500.00.

PROGRAMS/TRAININGS/SCHOOLS CREATED

Green Meadows Charter School. A Waldorf-inspired charter school focusing on social justice and environmental sustainability. Founding member. School slated to open Fall, 2015.

Masters of Arts in Education with an Emphasis in Waldorf Education – A Masters Program at Bellarmine University. Created and implemented in 2005.

Kentahten Teacher Training – A teacher training inspired by Waldorf education. Created and implemented in 2005 for public school teachers.

Great Lakes Waldorf Teacher Training – A Waldorf Teacher Training with a Masters from Mount Mary College. Created and implemented in 2002.

PROFESSIONAL PRESENTATIONS

International and National Presentations

Goral, M. & Oberman, I. (2013). Learning Journey of Three Title I Waldorf-inspired Schools on the Road to Reading Opportunities and Challenges. A presentation made at the Alliance for Public Waldorf Education Conference. Sacramento, CA. January 2013.

Goral, M. (2011). Creating Curriculum for Farm and Garden-Based Education. A presentation made to the FBEBA (Farm-Based Education Based in Anthroposophy) group. Hawthorne Valley, NY: November, 2011.

Goral, M. (2009). Transformational Teaching: Waldorf-inspired Methods in the Public School. A presentation made to the WEA (Wisconsin Education Association) State Convention, Madison, Wisconsin, October, 2009.

Goral, M. (2009). Support and Revival of the Waldorf-inspired Cadre: Ten Case Studies. A presentation made to the American Education Research Association (AERA), San Diego, CA, April, 2009.

Goral, M. (2008). Teaching Environmental Sustainability in Math Class. A presentation made to the WEA (Wisconsin Education Association) State Convention, Madison, Wisconsin, October.

Goral, M. (2008). *Green Schools and Outdoor Classrooms*. A presentation made

at the Rouge Forum, Louisville, KY. March.

Goral, M. (2008). *Transformational Teaching: Using Waldorf-Inspired Methods in the Public Schools*. A presentation made to the AERA (American Educational Research Association) pre-session, March.

Goral, M. (2007). *Teaching Science for a Sustainable Future*. A presentation made to the WEA (Wisconsin Education Association) State Convention, Milwaukee, Wisconsin, October.

Goral, M. (2007). *A Waldorf-Inspired Approach to Teaching Mathematics*. A presentation made to the National Council of Teachers of Mathematics (NCTM) national convention. March.

Goral, M. (2007). *Teaching Sustainability Through Science*. Proposal accepted for Hawaii International Conference on Education, Honolulu, Hawaii. January.

Goral, M. (2006). *Creating Environments Where Students Can Learn*. A paper presented at the WEA (Wisconsin Education Association) State Convention, Madison, Wisconsin, October.

Goral, M. (2006). *Reverence and Respect for All*. A presentation made to the WEA State Convention, Madison, Wisconsin, October.

Goral, M. (2005). *Consciousness and Solidarity: One School of Education's Process and Journey*. A paper presented at the IERG (Imagination in Education Research Group) International Conference, Vancouver, British Columbia, July.

Goral, M. (2005). *Current Educational Research Supporting Waldorf Education*. A lecture presented at the Conference on Waldorf in the Public Sector, Rudolf Steiner College, Sacramento, CA, January.

Goral, M. (2003). *Teaching for a Sustainable Future*. A professional clinic presented at the Cardinal Stritch University Conference on Leadership for the 21st Century, Milwaukee, WI, March.

Goral, M. (2000). *Where's Waldorf? Waldorf Education in the Context of School Restructuring and Reform*. A paper presented at the annual meeting of the American Educational Research Association (AERA), New Orleans, April.

Goral, M. & Stacki, S. (2000). *Affective Objectives and the Preservice Teacher*. A paper presented at the annual meeting of the Association of Teacher Educators (ATE), Orlando, FL, February.

Goral, M. (1998). *A Healing Education For All: Waldorf Inspired Pedagogy for Early Childhood and Elementary Preservice Teachers*. A paper presented at the annual

meeting of the Journal of Curriculum Theorizing (JCT). Bloomington, IN, October.

Goral, M. (1998). *Mysticism in the Mainstream: A Study of Waldorf Schools in Scandinavia*. A paper presented at the annual meeting of the American Educational Research Association, San Diego, CA, April.

Goral, M. (1997). *Teachers and Teaching in a Waldorf School*. A paper presented at the annual meeting of the Journal of Curriculum Theorizing (JCT). Bloomington, IN, October.

Sturbaum, M. (1996). *Spirituality in Education: Themes of Learning for the 21st Century*. A paper presented at the annual meeting of the Journal of Curriculum Theorizing (JCT). Nashville, TN. October.

Sturbaum, M. (1994). *From Community Service to Social Action: One Fourth Grade Classroom's Journey*. A paper presented at the annual meeting of Democracy and Education. Athens, Ohio. June.

Sturbaum, M., Wiest, L., & Stacki, S. (1993). *Casing Out Case Studies*. A paper presented at the annual meeting of the Journal of Curriculum Theorizing (JCT). Dayton, Ohio. October.

Sturbaum, M. & Stacki, S. (1993). *Morality in the Middle: Teacher's Share Their Views on Roles and Training*. A paper presented at the annual meeting of the Journal of Curriculum Theorizing (JCT). Dayton, Ohio, October.

Sturbaum, M. & Treadway, E. (1993). *Unity and Diversity: A Global Education Workshop for Elementary Teachers*. A paper presented at the annual meeting of the Journal of Curriculum Theorizing (JCT). Dayton, Ohio. October.

Wiest, L. & Sturbaum, M. (1993). *Mathematics Education in Scottish Primary Schools*. A paper presented at the annual meeting of the Journal of Curriculum Theorizing. Dayton, Ohio. October.

Regional and Local Presentations

Goral, M. (2013). An Overview of Waldorf Education. Presented to faculty and staff at Tomorrow River Community Charter School. June, 2013.

Goral, M. (2013). Teaching Language Arts. Presented to faculty and staff at Tomorrow River Community Charter School. August, 2013.

Goral, M. (2013). Nature-based Education. Presented to faculty and staff at Tomorrow River Community Charter School. November, 2013.

Goral, M. (2013). Schooling for a Regenerative Future: Lessons from Waldorf Education. Public Meeting Presentation made to the community in Hailey, Idaho. November, 2013.

Goral, M. (2013). *Toward a Culture of Community*. A presentation made to the INDY Waldorf Group. Indianapolis, IN. 2013.

Goral, M. (2012). *Introduction to Waldorf Education*. A presentation made to teachers in Jefferson County Public Schools, Louisville, KY. November

Goral, M. (2012). *Integrating the curriculum: The 2012 election*. A presentation made to teachers at Meredith Dunn School. Louisville, KY. September.

Goral, M. (2010). *Introduction to Waldorf Education*. A presentation made for teachers in Jefferson County Public Schools, Louisville, KY. November.

Goral, M. (2010). *Teaching Storytelling*. A presentation made to teachers at Meredith Dunn School. Louisville, KY. October.

Goral, M. (2010). *What is Waldorf Education?* A presentation made for Art Administration majors at Indiana University. Bloomington, IN. April.

Goral, M. (2010). *Head, Hands, and Heart*. A presentation made for the Bellarmine Center for Teacher Excellence. Louisville, KY. January.

Goral, M. (2009). *Children and Play: Research behind the Practice*. A presentation made to the first annual Children at Play conference, Bernheim Forest, KY, October.

Goral, M. (2009). *Research Supporting Waldorf Education*. A presentation made to parents and teachers at the Waldorf School of Louisville, March.

Goral, M. (2008). *Integrating Waldorf-Inspired Methods*. Presentation made to Byck Elementary School Faculty. October.

Goral, M. (2006). *Waldorf Education: A Vision for the Future*. Lecture presented for Waldorf School of Louisville Fundraising Event. May.

Goral, M. (2005). *Education for a Sustainable Future: Current Research Supporting Waldorf Schools*. A paper presented to Shining Rivers Waldorf School, St. Louis, MO, November.

Goral, M. (2005). *Education for a Sustainable Future: Current Educational Research Supporting Waldorf Education*. A paper presented to Sycamore Springs Waldorf Initiative, Bloomington, IN, June.

Goral, M. (2004). *Waldorf Education in Today's World*. A lecture presented to the parents at Prairie Hill Waldorf School. Pewaukee, WI. March.

Goral, M. (2003). *Challenging our Best and Brightest*. A professional clinic

presented to Catholic School Principals. Louisville, KY. September.

Goral, M. (2002). *Waldorf Education in the Public School Setting*. A lecture presented to the Waukesha County Administrative Group. Prairie Hill Waldorf School. Pewaukee, WI. January.

Goral, M. (2001). *Spirituality in Education*. A lecture presented at the Unity Church, Bloomington, IN, June.

Goral, M. (1999). *How to Talk about Waldorf Education*. A professional clinic presented at Prairie Hill Waldorf School, Pewaukee, WI, November.

Goral, M. (1999). *Connective Pedagogy*. A paper presented at the annual meeting of the Midwest Regional Conference on Waldorf Education, Milwaukee, WI, October.

Goral, M. (1998). *An Introduction to Rudolf Steiner and Waldorf Education*. A lecture presented at the Faculty Forum. Hanover College, Hanover, IN. May.

Sturbaum, M. (1995). *A Kinesthetic Approach to Teaching Mathematics*. A lecture presented for Talk and Tea, Indiana University Department of Mathematics Education. Bloomington, IN. November.

Workshop Presentations

Goral, M. & Stottmann, D. (2013). An introduction to Waldorf Education. A workshop presentation made to teachers in Shelby County, KY. April.

Goral, M. & Stottmann, D. (2012). Teaching storytelling through the grades. A workshop presentation made to the Waldorf-inspired Cadre. Louisville, KY. September.

Goral, M. & Ruud, M. (2012). Teaching writing in a Waldorf-inspired charter school. A 4-day workshop presented to the teachers at Blue Oak Charter School. Chico, CA. August.

Goral, M. & Stottmann, D. (2010). The Extra Lesson. A workshop presentation made to the Waldorf-inspired Cadre. Louisville, KY. February.

Goral, M. (2010). Using the Arts to Teach Mathematics II. A presentation made to the faculty at Meredith Dunn School. Louisville, KY. January.

Goral, M. (2009). Using the Arts to Teach Mathematics. A presentation made to the faculty at Meredith Dunn School. Louisville, KY. October.

Goral, M. (2009). Teaching Math Through the Arts. A presentation made to the faculty at Klondike Elementary. Louisville, KY. July.

Goral, M. (2007). *Using Waldorf-Inspired Approaches to Teach Mathematics*. A workshop presented for the faculty at Heritage Elementary, Shelbyville, KY. November.

Goral, M. (2007). *Best Practices for Teaching Mathematics*. A workshop presented for the faculty of Dunn Elementary School, Louisville, KY. July.

Goral, M. (2006). *Teaching Mathematics Using Multiple Intelligences and Best Practice: A Waldorf Inspired Approach..* A workshop presented to the faculty at Dann C. Byck Elementary School. Louisville, KY. August.

Goral, M. (2005). *Teaching for All Learners: Using Movement, Music, and Story to Teach Mathematics and Science*. A workshop presented to the faculty at Shining Rivers Waldorf School. St. Louis, MO. November.

Goral, M., O’Laughlin, K., & Ruud, M. (2005). *Weaving Movement and the Arts into the Core Content*. A workshop presented to the JCPS Waldorf Inspired Cadre and friends. Louisville, KY. September.

Goral, M. (2005). *Education for a Sustainable Future: Thriving and Surviving in the 21st Century*. A workshop presented at the AWSNA (Association of Waldorf Schools of North America) Southwest Regional Teachers’ Conference. Boulder, CO. February.

Goral, M. & O’Laughlin, K. (2004). *Growth of Culture and Freedom in the United States: An African American Journey*. A workshop presented to the Waldorf Inspired Cadre. Louisville, KY. November.

Goral, M. (2004). *Weaving Literacy into the Social Studies*. A workshop presented to the JCPS Waldorf Inspired Cadre. Louisville, KY. September.

Goral, M., & Pullen, M.. (2004). *Teaching to Today’s Learners*. A week-long workshop presented to the faculty of Kentucky Country Day School. Louisville, KY. June.

Goral, M. & Pullen, M. (2004). *Transformational Teaching: Integrating the Arts into the Academic Subjects*. A week-long workshops presented to the JCPS Waldorf Inspired Cadre. Louisville, KY. June.

Goral, M. (2004). *Making Meaning through the Creation of Image*. A workshop presented to the JCPS Waldorf Inspired Cadre. Otter Creek State Park, KY. March 5.

Goral, M. (2004). *Teaching Mathematics Through Literature and the Arts II*. A workshop presented to the JCPS Waldorf Inspired Cadre. Louisville, KY. January.

Goral, M. (2003). *Teaching Mathematics Through Literature and the Arts I*. A workshop presented to the JCPS Waldorf Inspired Cadre. Louisville, KY. October.

Goral, M. (2003). *The Art of Ritual*. A workshop presented to the faculty of

Milwaukee's Expeditionary Learning Charter School. August.

Goral, M. (2003). *Transformational Teaching: Using Storytelling, Movement, and Music to Engage Learners*. A week-long workshop presented to public and private school teachers in Louisville, KY. June.

Goral, M. (2003). *Life Enhancement for Teachers*. A workshop presented to public and private school teachers at the Ommani Center, Pewaukee, WI, January.

Goral, M. (2002). *Life Enhancement for Teachers*. A workshop presented to public and private school teachers at the Ommani Center, Pewaukee, WI. March.

Goral, M. (2000). *The Art of Waldorf Education*. A workshop presented to the faculty at The Arts Academy. Robinsdale, MN. June.

Goral, M. (2000). *Problem/Project Based Learning*. A workshop presented to the faculty at Cornerstone Achievement Academy, Milwaukee, WI. May.

Goral, M. (1999) *Connecting Waldorf Education to Current Reform and Restructuring Efforts*. A lecture presented to parents at Prairie Hill Waldorf School, Pewaukee, WI. May.

Goral, M. (1999) *Teaching Mathematics Through Story, Movement and Music*. A workshop presented for the faculty of St. Paul Catholic School, Genesse Depot, WI. March.

Goral, M. (1997). *Research Topics in Waldorf Education*. A lecture presented to the faculty of the Rudolf Steiner School of Ann Arbor. Ann Arbor, MI. November.

Sturbaum, M. (1992). *Learning Styles and Brain Theory*. A workshop presented for Valparaiso Public Schools, Valparaiso, IN. October.

Sturbaum, M. (1992). *Learning Styles and Brain Theory*. A workshop presented for Plainfield Public Schools, Plainfield, IN. August.

Sturbaum, M. (1992). *Integrating Music into the Curriculum*. A workshop presented for Monroe County Community School Corporation, Bloomington, IN. May.

Sturbaum, M. (1990). *Mathematics Enrichment for Elementary Teachers*. A workshop presented for Monroe County Community School Corporation, Bloomington, IN. April.

Sturbaum, M. (1986). *Hands on Science for Elementary Teachers*. A series of workshops presented for Monroe County Community School Corporation, Bloomington, IN. Fall.

PROFESSIONAL MEMBERSHIPS

Member, National Council of Teachers of Mathematics. 1994-2010.

Member, National Science Teachers Association, 2009 – 2010.

Member, Association for Supervision and Curriculum Development. 1994- 1996.

Member, American Educational Research Association. 1996- 2010

Member of the Rudolf Steiner College Board of Trustees. July 2008 – 2011.

SERVICE

Professional

Board of Trustees Member for the Rudolf Steiner College, Fair Oaks, CA. 2008-2011.

Planning Committee Member for Pre-AERA Session, Waldorf education in the public school setting, 2008-2009.

St. Francis of Goshen Gardening Group, 2008-2009.

Steering Committee Member for the Waldorf Inspired Magnet Program at Dann C. Byck Elementary, Louisville, KY. 2006 – 2010.

Textbook Review: Kennedy, L., Tipps, S. & Johnson, A. (2006). *Guiding Children's Learning of Mathematics*, 11th, ed. Belmont, CA: Thomson & Wadsworth.

Articles Reviewed – *Teaching Children Mathematics*, 2006 - 2010.

Articles Reviewed – *Mathematics in the Middle School*, 2008 – 2010.

American Educational Research Association (AERA) - Wholistic Education Special Interest Group. Co-President, 2000-2001

American Educational Research Association (AERA) - Wholistic Education Special Interest Group. Treasurer, 1998-2000

Board Member – Prairie Hill Waldorf School, Pewaukee, WI, 2000-2001.

University Committees: Bellarmine University

Faculty Development Committee Member, 2009 – 2010

Bellarmino Farm Committee Member, 2009 - 2010

Thomas Merton Committee Member, 2008-2010

Wyatt Scholarship Committee Member, 2010

Graduate Educational Affairs, Committee Chair, 2007-2008

Faculty Council, 2007-2009
Faculty Council Coordinating Committee, 2007-2008
Wyatt Scholarship Committee, Committee Chair, 2007 – 2009
School of Education Search Committee, Committee Chair, 2007
Faculty Affairs Subcommittee, Chapter 7, 2003-2007.
School of Education NCATE Committees, 2003 – 2006
School of Education Scholarship and Collegiality Committee Chair, 2004-2006
Teacher Education Advisory Board, 2003 – 2010
Faculty Search Committee, 2005
Faculty Council, 2004-2005
Wyatt Scholarship Committee, 2004-2006
Freshman Focus Instructor. 2004-2007

University Committees: Mount Mary College

Faculty Senate Secretary, 1999-2000
Teacher Education Advisory Board, 1998 – 2000
Faculty Search Committees, 1998 - 2000

University Committees: Hanover College

Teacher Education Subcommittee, 1995 – 1998
Merit Scholarship Committee, 1996 – 1998
Faculty Search Committees, 1996-1998

REFERENCES

Available upon request

MICHELLE ALLISON HENDERSON

1121 E. Calloway Street
Bloomington, IN 47401
mhenders@indiana.edu
(812)391-3233 (cell)

ACADEMIC DEGREES

Indiana University: Ph.D. in Curriculum Studies with focus on social education in primary grades. Graduation: December 2009. Recipient of Scrivner Award for Leadership in Elementary Education. GPA: 3.85.

Indiana University Purdue University: Indianapolis, Indiana. Master of Science degree in Social Psychology. Graduation: December 1987, GPA: 5.6.

Purdue University: Lafayette, Indiana. Bachelor of Arts degree, double-majoring in Psychology and in French. Graduation: May 1984, GPA: 5.4.

RELATED PROFESSIONAL EXPERIENCE

Project Coordinator: Global Learning Across Indiana; Ivy Tech Community College; January 2013 to present.

- Working with Ivy Tech faculty to internationalize courses through workshops and collaboration on development of a Global Learning Certificate

Extension Assistant Educator: Purdue Cooperative Extension. November 2011 to November 2012.

- Working with low income families in both individual and group settings for basic life skills instruction and consultation, primarily in the areas of nutrition and budgeting

Student Teacher Supervisor: Indiana University School of Education; January 2008 to present.

- Supervising student teachers placed in local schools and in surrounding counties

Co-Director: Writing Unlimited and Sisters of the Flying Fountain Pen, September 2005 to present

- Working with girls ages 8-15 to develop writing and leadership skills through writing circles, workshops, retreats, and summer camps

Family Literacy Coordinator: Clear Creek Elementary School; December 2002 to May 2005.

- Worked with administrators and teachers to increase parent involvement at Clear Creek
- Worked directly with students and parents to plan and implement service projects

Associate Instructor: Cultural Immersion Projects, Indiana University; January 2000 to December 2002.

- Worked with team to design curriculum and teach classes promoting cross-cultural understanding and communication for pre-service teachers preparing to student teach overseas for ten weeks

Workshop Administrator and Facilitator: First United Methodist Church; January 1999 to May 2000.

- Attended training workshop, coordinated and facilitated 12-week life skills course (Survival Skills For Women) for clients of local social service agencies.

Preschool Teacher: First United Methodist Church Preschool Program; August 1995 to December 1998.

- Worked with co-teacher to develop curriculum and programs for three and four year olds
- Planned and held parenting support/discussion classes for parents of preschool children

English Instructor: International English Center, University of Colorado; January 1991 to January 1993.

- Taught ESL classes (reading/writing/grammar) to international students (young adults)

Elementary School Teacher: Le Lycee Francais de Los Angeles, CA; August 1987 to June 1990.

- Taught English to second, third, and fourth grade international students
- Developed curriculum for all classes including reading programs, assessment, and ESL lessons

Brandi L. Smith

1314 E. Fairwood Drive
Bloomington, IN 47408
blsmith2@indiana.edu
(812) 272-6358

WORK EXPERIENCE

Adjunct Lecturer, Human Development and Family Studies, December 2013-present

Department of Applied Health Sciences, School of Public Health, Indiana University, Bloomington IN

- “Marriage and Family Interaction” lecture and discussion format class of 100 undergraduates
- Write class lectures, organize and implement small group activities, oversee undergraduate discussion leaders

Internship in Human Development and Family Studies, Indiana University, January-April, 2012

Circles Initiative, South Central Community Action Program, Bloomington, IN

- Youth Community Coordinator
- Design personal and family food resources for individuals and families living in poverty
- Case management support

Essential Balance, Bloomington, IN, May 2002- October 2011

Certified Massage Therapist

- Part time massage therapist practicing in-home therapy
- Small business duties such as maintaining accounting records, marketing, and clinical massage treatment

Hoosier Hills Food Bank Garden and Gleaning Program, September 2010- August 2011

Program Assistant

- Volunteer Recruitment and donation solicitation
- Public Speaking to promote program within Bloomington community
- Garden maintenance

Nature’s Crossroads Earth Friendly Seeds, January-April 2011

Freelance Curriculum Design

- Designed “Pioneer Gardens” curriculum unit for school seed sale fundraiser
- Presentation of fundraiser in school classrooms

Work at Home Mother and Mini-Farmer, July 2000- October 2010

Four Fawns Hill, Bloomington, IN

- Maintain household according to holistic and sustainable principles
- Renovated 1.5 acres forest land into mini farm to supply our family’s produce and eggs
- Homeschooled eldest child for two years while participating in a cooperative group that grew out of Sycamore Spring Waldorf School (see below)

- Organized Practical Waldorf At Home, a parenting and homeschooling workshop, on behalf of workshop facilitator, Donna Simmons of Christopherus Homeschooling Resources

John Waldron Arts Center, Bloomington, IN, 1997-2001

Ceramics Teacher for Adults and Children

- Taught adult and children fundamental skills in ceramics
- Designed projects for individuals and coordinated class curriculum

Tina's Catering and Cuisine, Bloomington, IN, July 1999- 2000

Baker and Cook

- Commercial kitchen food preparation

Hamilton Southeastern Schools, Fishers, IN, January 1999- June 1999

English as a Second Language Assistant

- Worked with high school students individually and in classroom to develop English skills

Indiana University, Fundamentals of Three Dimensional Design, January 1998- May 1998

Teaching Assistant

- Shadowed Professor Georgia Strange, teaching college level art course for undergraduates

VOLUNTEER EXPERIENCE

The Green School, formerly known as Green Meadows Charter School, April 2012- Present

Founders Group Member

- Co-write Proposal Document for progressive holistic education model
- Parent and community outreach
- Education for Sustainability curriculum design

Bloomington Food Policy Council, January 2010- May 2012

Education Working Group Co-Chair

- Manage agendas, run group meetings
- Organize educational events and projects on behalf of council at large

Bloomington Winter Farmers Market, Bloomington, IN, March 2008 to December 2009

Consumer Advisory Council Member

- Steer and promote the Winter Market via monthly council meetings
- Participation in writing grant application for USDA Farmers Market Promotion Program, taking customer surveys, and workshop panels

Sycamore Spring Waldorf School, Bloomington, IN, September 2003- May 2006

Founding Family and Council Member

- 1 of 5 founding families that ran a cooperative Waldorf Preschool
- Volunteer position included service on administrative parent council for 3 years
- Organized fundraising events such as creating, making and selling goods annually for Holiday Market, and a May Day Festival

Free Lance Workshop Facilitator and Coordinator

- *Eating Healthy on a Budget, and Pantry Primer*; a food choice series presented at Mother Hubbard's Cupboard, October 2010
- *Healthier Eating*, food education class presented at St. Mark's Nursery School, October 2009
- *Practical Waldorf At Home*, coordinated workshop facilitated by Donna Simmons of Christopherus Homeschool Resources, August 2006
- *Body Awareness Movement*, series of classes at Associates of Integrative Health, Fall 2002
- *Birth Art*; art class for postpartum mothers processing birth experiences, Spring 2001

Formal Education

M.S. in Human Development and Family Studies, August 2012

Department of Applied Health Sciences; School of Public Health; Indiana University, Bloomington

- Research on the overlaps of systems thinking and human development in a Human Ecological Systems Theory with program design for sustainable personal, family, and community health promotion

500 hours Massage Therapy training, May 2002, *Associates of Integrative Health, Bloomington, IN*

B.A. Spanish and Studio Art, December 1998, *Indiana University, Bloomington, IN*

- Spanish Honors Student, wrote and researched thesis on "Feminine Psychology in the Trilogy of Francisco Garcia Lorca," 1998

Informal Education

- Grow Organic Educator, City of Bloomington People's University, 2007
- Polarity Therapy, 250 contact hours training with Donna Cooney, RPP, NCTMB, 2004

Affiliations, Awards, and Activities

Affiliations

- Member of the National Council on Family Relations
- Member of Local Growers Guild, Bloomington, IN

Awards

- Graduated Cum Laude, honors in Spanish, Indiana University, 1998
- Founders Day Scholar, Indiana University, consecutive fall and spring semesters 1995-1998
- "High Academic Achievement" University of Illinois, Chicago, Summer 1997, in conjunction with Universidad de Guanajuato and Indiana University Department of Overseas Study

Activities

- Travel, immersion, and Spanish language and Mexican Art History study, Universidad de Guanajuato, Guanajuato, Mexico, summer 1997
- Sustainable Home Economist, specializing in home food production employing sustainable methods

References

Available upon request

Form 1023 Checklist

(Revised December 2013)

Application for Recognition of Exemption under Section 501(c)(3) of the Internal Revenue Code

Note. Retain a copy of the completed Form 1023 in your permanent records. Refer to the General Instructions regarding Public Inspection of approved applications.

Check each box to finish your application (Form 1023). Send this completed Checklist with your filled-in application. If you have not answered all the items below, your application may be returned to you as incomplete.

- Assemble the application and materials in this order:
 - Form 1023 Checklist
 - Form 2848, *Power of Attorney and Declaration of Representative* (if filing)
 - Form 8821, *Tax Information Authorization* (if filing)
 - Expedite request (if requesting)
 - Application (Form 1023 and Schedules A through H, as required)
 - Articles of organization
 - Amendments to articles of organization in chronological order
 - Bylaws or other rules of operation and amendments
 - Documentation of nondiscriminatory policy for schools, as required by Schedule B
 - Form 5768, *Election/Revocation of Election by an Eligible Section 501(c)(3) Organization To Make Expenditures To Influence Legislation* (if filing)
 - All other attachments, including explanations, financial data, and printed materials or publications. Label each page with name and EIN.
- User fee payment placed in envelope on top of checklist. DO NOT STAPLE or otherwise attach your check or money order to your application. Instead, just place it in the envelope.
- Employer Identification Number (EIN)
- Completed Parts I through XI of the application, including any requested information and any required Schedules A through H.
 - You must provide specific details about your past, present, and planned activities.
 - Generalizations or failure to answer questions in the Form 1023 application will prevent us from recognizing you as tax exempt.
 - Describe your purposes and proposed activities in specific easily understood terms.
 - Financial information should correspond with proposed activities.
- Schedules. Submit only those schedules that apply to you and check either "Yes" or "No" below.

Schedule A	Yes ___ No <input checked="" type="checkbox"/>	Schedule E	Yes ___ No <input checked="" type="checkbox"/>
Schedule B	Yes <input checked="" type="checkbox"/> No ___	Schedule F	Yes ___ No <input checked="" type="checkbox"/>
Schedule C	Yes ___ No <input checked="" type="checkbox"/>	Schedule G	Yes ___ No <input checked="" type="checkbox"/>
Schedule D	Yes ___ No <input checked="" type="checkbox"/>	Schedule H	Yes ___ No <input checked="" type="checkbox"/>

An exact copy of your complete articles of organization (creating document). Absence of the proper purpose and dissolution clauses is the number one reason for delays in the issuance of determination letters.

- Location of Purpose Clause from Part III, line 1 (Page, Article and Paragraph Number) pg. 1, Article 3.1
- Location of Dissolution Clause from Part III, line 2b or 2c (Page, Article and Paragraph Number) or by operation of state law pg. 9, Article 9, paragraph 6

Signature of an officer, director, trustee, or other official who is authorized to sign the application.

- Signature at Part XI of Form 1023.

Your name on the application must be the same as your legal name as it appears in your articles of organization.

Send completed Form 1023, user fee payment, and all other required information, to:

Internal Revenue Service
P.O. Box 192
Covington, KY 41012-0192

If you are using express mail or a delivery service, send Form 1023, user fee payment, and attachments to:

Internal Revenue Service
201 West Rivercenter Blvd.
Attn: Extracting Stop 312
Covington, KY 41011



Department of the Treasury Internal Revenue Service

Notice 1382

(Rev. October 2013)

Changes for Form 1023

- Mailing address
 - Parts IX, X, and XI
-

Reminder: Do Not Include Social Security Numbers on Publicly Disclosed Forms

Because the IRS is required to disclose approved exemption applications and information returns, exempt organizations should not include Social Security numbers on these forms. Documents subject to disclosure include supporting documents filed with the form, and correspondence with the IRS about the filing.

Changes for Form 1023, Application for Recognition of Exemption Under Section 501(c)(3) of the Internal Revenue Code

Change of Mailing Address

The mailing address shown on Form 1023 Checklist, page 28, the first address under the last checkbox; and in the Instructions for Form 1023, page 4 under *Where To File*, has been changed to:

Internal Revenue Service
P.O. Box 12192
Covington, KY 41012-0192

To file using a private delivery service, mail to:

201 West Rivercenter Blvd.
Attn: Extracting Stop 312
Covington, KY 41011

Changes for Parts IX and X

Changes to Parts IX and X are necessary to comply with new regulations that eliminated the advance ruling process. Until Form 1023 is revised to reflect this change, please follow the directions on this notice when completing Part IX and Part X of Form 1023. For more information about the elimination of the advance ruling process, visit us at IRS.gov. In the top right "Search" box, type "Elimination of the Advance Ruling Process" (exactly as written) and select "Search."

Part IX. Financial Data

The instructions at the top of Part IX on page 9 of Form 1023 are now as follows. For purposes of this schedule, years in existence refer to completed tax years.

1. If in existence less than 5 years, complete the statement for each year in existence and provide projections of your likely revenues and expenses based on a reasonable and good faith estimate of your future finances for a total of:
 - a. Three years of financial information if you have not completed one tax year, or
 - b. Four years of financial information if you have completed one tax year.

(Continued)

2. If in existence 5 or more years, complete the schedule for the most recent 5 tax years. You will need to provide a separate statement that includes information about the most recent 5 tax years because the data table in Part IX has not been updated to provide for a 5th year.

Part X. Public Charity Status

Do not complete line 6a on page 11 of Form 1023, and do not sign the form under the heading "Consent Fixing Period of Limitations Upon Assessment of Tax Under Section 4940 of the Internal Revenue Code."

Only complete line 6b and line 7 on page 11 of Form 1023, if in existence 5 or more tax years.

Part XI. Increase in User Fees

User fee increases are effective for all applications postmarked after January 3, 2010.

1. \$400 for organizations whose gross receipts do not exceed \$10,000 or less annually over a 4-year period.
2. \$850 for organizations whose gross receipts exceed \$10,000 annually over a 4-year period.

For the current user fee amounts, go to IRS.gov and in the "Search" box at the top right of the page, enter "Exempt Organizations User Fees." You can also call 1-877-829-5500.

Application for reinstatement and retroactive reinstatement. An organization must apply to have its tax-exempt status reinstated if it was automatically revoked for failure to file a return or notice for three consecutive years. The organization must:

- (1) Complete and file Form 1023 if applying under section 501(c)(3) or Form 1024 if applying under a different Code section;
- (2) Pay the appropriate user fee and enclose it with the application;
- (3) Write "Automatically Revoked" at the top of the application and mailing envelope; and
- (4) Submit a written statement supporting its request if applying for retroactive reinstatement.

If the application is approved, the date of reinstatement generally will be the postmark date of the application, unless the organization qualifies for retroactive reinstatement. Alternate submissions and standards apply for retroactive reinstatement back to the date of automatic revocation. See Notice 2011-44, 2011-25 I.R.B. 883, at http://www.irs.gov/irb/2011-25_IRB/ar10.html, for details.

Changes for the Instructions for Form 1023

- Change to Part III. Required Provisions in Your Organizing Documents
- Clarification to Appendix A. Sample Conflict of Interest Policy

(Continued)

Changes to Instructions for Form 1023, Application for Recognition of Exemption Under Section 501(c)(3) of the Internal Revenue Code (Rev. June 2006)

Part III. Required Provisions in Your Organizing Document

Applicable to organizations in the state of New York. Changes are necessary to comply with Rev. Proc. 82-2, 1982-1 C.B. 367, to incorporate the state of New York as a jurisdiction that complies with the *cy pres* doctrine to keep a charitable testamentary trust from failing the requirement for a dissolution clause under Regulations section 1.501(c)(3)-1(b)(4), when the language of the trust instrument demonstrates a general intent to benefit charity. Therefore, the instructions on page 8, line 2c, after the third paragraph now include the state of New York in the state listing as an authorized state. Since the state of New York allows testamentary charitable trusts formed in that state and the language in the trust instruments provides for a general intent to benefit charity, you do not need a specific provision in your trust agreement or declaration of trust providing for the distribution of assets upon dissolution.

Appendix A. Sample Conflict of Interest Policy

Appendix A, Sample Conflict of Interest Policy, is only intended to provide an example of a conflict of interest policy for organizations. The sample conflict of interest policy does not prescribe any specific requirements. Therefore, organizations should use a conflict of interest policy that best fits their organization.

Application for Recognition of Exemption
Under Section 501(c)(3) of the Internal Revenue Code

(00)

OMB No. 1545-0056

Note: If exempt status is approved, this application will be open for public inspection.

Use the instructions to complete this application and for a definition of all **bold** items. For additional help, call IRS Exempt Organizations Customer Account Services toll-free at 1-877-829-5500. Visit our website at www.irs.gov for forms and publications. If the required information and documents are not submitted with payment of the appropriate user fee, the application may be returned to you.

Attach additional sheets to this application if you need more space to answer fully. Put your name and EIN on each sheet and identify each answer by Part and line number. Complete Parts I - XI of Form 1023 and submit only those Schedules (A through H) that apply to you.

Part I Identification of Applicant

1 Full name of organization (exactly as it appears in your organizing document)		2 c/o Name (if applicable)	
3 Mailing address (Number and street) (see instructions)		Room/Suite	4 Employer Identification Number (EIN)
City or town, state or country, and ZIP + 4		5 Month the annual accounting period ends (01 - 12)	
6 Primary contact (officer, director, trustee, or authorized representative)		b Phone:	
a Name:		c Fax: (optional)	
7 Are you represented by an authorized representative, such as an attorney or accountant? If "Yes," provide the authorized representative's name, and the name and address of the authorized representative's firm. Include a completed Form 2848, <i>Power of Attorney and Declaration of Representative</i> , with your application if you would like us to communicate with your representative.		<input type="checkbox"/> Yes <input type="checkbox"/> No	
8 Was a person who is not one of your officers, directors, trustees, employees, or an authorized representative listed in line 7, paid, or promised payment, to help plan, manage, or advise you about the structure or activities of your organization, or about your financial or tax matters? If "Yes," provide the person's name, the name and address of the person's firm, the amounts paid or promised to be paid, and describe that person's role.		<input type="checkbox"/> Yes <input type="checkbox"/> No	
9a Organization's website:			
b Organization's email: (optional)			
10 Certain organizations are not required to file an information return (Form 990 or Form 990-EZ). If you are granted tax-exemption, are you claiming to be excused from filing Form 990 or Form 990-EZ? If "Yes," explain. See the instructions for a description of organizations not required to file Form 990 or Form 990-EZ.		<input type="checkbox"/> Yes <input type="checkbox"/> No	
11 Date incorporated if a corporation, or formed, if other than a corporation. (MM/DD/YYYY)		/ /	
12 Were you formed under the laws of a foreign country ? If "Yes," state the country.		<input type="checkbox"/> Yes <input type="checkbox"/> No	

Part II Organizational Structure

You must be a corporation (including a limited liability company), an unincorporated association, or a trust to be tax exempt. (See instructions.) **DO NOT file this form unless you can check "Yes" on lines 1, 2, 3, or 4.**

- 1 Are you a **corporation**? If "Yes," attach a copy of your articles of incorporation showing **certification of filing** with the appropriate state agency. Include copies of any amendments to your articles and be sure they also show state filing certification. **Yes** **No**

- 2 Are you a **limited liability company (LLC)**? If "Yes," attach a copy of your articles of organization showing certification of filing with the appropriate state agency. Also, if you adopted an operating agreement, attach a copy. Include copies of any amendments to your articles and be sure they show state filing certification. Refer to the instructions for circumstances when an LLC should not file its own exemption application. **Yes** **No**

- 3 Are you an **unincorporated association**? If "Yes," attach a copy of your articles of association, constitution, or other similar organizing document that is dated and includes at least two signatures. Include signed and dated copies of any amendments. **Yes** **No**

- 4a Are you a **trust**? If "Yes," attach a signed and dated copy of your trust agreement. Include signed and dated copies of any amendments. **Yes** **No**
- b Have you been funded? If "No," explain how you are formed without anything of value placed in trust. **Yes** **No**

- 5 Have you adopted **bylaws**? If "Yes," attach a current copy showing date of adoption. If "No," explain how your officers, directors, or trustees are selected. **Yes** **No**

Part III Required Provisions in Your Organizing Document

The following questions are designed to ensure that when you file this application, your organizing document contains the required provisions to meet the organizational test under section 501(c)(3). Unless you can check the boxes in both lines 1 and 2, your organizing document does not meet the organizational test. **DO NOT file this application until you have amended your organizing document.** Submit your original and amended organizing documents (showing state filing certification if you are a corporation or an LLC) with your application.

- 1 Section 501(c)(3) requires that your organizing document state your exempt purpose(s), such as charitable, religious, educational, and/or scientific purposes. Check the box to confirm that your organizing document meets this requirement. Describe specifically where your organizing document meets this requirement, such as a reference to a particular article or section in your organizing document. Refer to the instructions for exempt purpose language. Location of Purpose Clause (Page, Article, and Paragraph): _____

- 2a Section 501(c)(3) requires that upon dissolution of your organization, your remaining assets must be used exclusively for exempt purposes, such as charitable, religious, educational, and/or scientific purposes. Check the box on line 2a to confirm that your organizing document meets this requirement by express provision for the distribution of assets upon dissolution. If you rely on state law for your dissolution provision, do not check the box on line 2a and go to line 2c.
- 2b If you checked the box on line 2a, specify the location of your dissolution clause (Page, Article, and Paragraph). Do not complete line 2c if you checked box 2a. _____
- 2c See the instructions for information about the operation of state law in your particular state. Check this box if you rely on operation of state law for your dissolution provision and indicate the state: _____

Part IV Narrative Description of Your Activities

Using an attachment, describe your *past, present, and planned* activities in a narrative. If you believe that you have already provided some of this information in response to other parts of this application, you may summarize that information here and refer to the specific parts of the application for supporting details. You may also attach representative copies of newsletters, brochures, or similar documents for supporting details to this narrative. Remember that if this application is approved, it will be open for public inspection. Therefore, your narrative description of activities should be thorough and accurate. Refer to the instructions for information that must be included in your description.

Part V Compensation and Other Financial Arrangements With Your Officers, Directors, Trustees, Employees, and Independent Contractors

- 1a List the names, titles, and mailing addresses of all of your officers, directors, and trustees. For each person listed, state their total annual **compensation**, or proposed compensation, for all services to the organization, whether as an officer, employee, or other position. Use actual figures, if available. Enter "none" if no compensation is or will be paid. If additional space is needed, attach a separate sheet. Refer to the instructions for information on what to include as compensation.

Name	Title	Mailing address	Compensation amount (annual actual or estimated)

Part V Compensation and Other Financial Arrangements With Your Officers, Directors, Trustees, Employees, and Independent Contractors (Continued)

b List the names, titles, and mailing addresses of each of your five highest compensated employees who receive or will receive compensation of more than \$50,000 per year. Use the actual figure, if available. Refer to the instructions for information on what to include as compensation. Do not include officers, directors, or trustees listed in line 1a.

Name	Title	Mailing address	Compensation amount (annual actual or estimated)

c List the names, names of businesses, and mailing addresses of your five highest compensated **independent contractors** that receive or will receive compensation of more than \$50,000 per year. Use the actual figure, if available. Refer to the instructions for information on what to include as compensation.

Name	Title	Mailing address	Compensation amount (annual actual or estimated)

The following "Yes" or "No" questions relate to *past, present, or planned* relationships, transactions, or agreements with your officers, directors, trustees, highest compensated employees, and highest compensated independent contractors listed in lines 1a, 1b, and 1c.

2a Are any of your officers, directors, or trustees **related** to each other through **family or business relationships**? If "Yes," identify the individuals and explain the relationship. **Yes** **No**

b Do you have a business relationship with any of your officers, directors, or trustees other than through their position as an officer, director, or trustee? If "Yes," identify the individuals and describe the business relationship with each of your officers, directors, or trustees. **Yes** **No**

c Are any of your officers, directors, or trustees related to your highest compensated employees or highest compensated independent contractors listed on lines 1b or 1c through family or business relationships? If "Yes," identify the individuals and explain the relationship. **Yes** **No**

3a For each of your officers, directors, trustees, highest compensated employees, and highest compensated independent contractors listed on lines 1a, 1b, or 1c, attach a list showing their name, qualifications, average hours worked, and duties.

b Do any of your officers, directors, trustees, highest compensated employees, and highest compensated independent contractors listed on lines 1a, 1b, or 1c receive compensation from any other organizations, whether tax exempt or taxable, that are related to you through **common control**? If "Yes," identify the individuals, explain the relationship between you and the other organization, and describe the compensation arrangement. **Yes** **No**

4 In establishing the compensation for your officers, directors, trustees, highest compensated employees, and highest compensated independent contractors listed on lines 1a, 1b, and 1c, the following practices are recommended, although they are not required to obtain exemption. Answer "Yes" to all the practices you use.

a Do you or will the individuals that approve compensation arrangements follow a conflict of interest policy? **Yes** **No**

b Do you or will you approve compensation arrangements in advance of paying compensation? **Yes** **No**

c Do you or will you document in writing the date and terms of approved compensation arrangements? **Yes** **No**

Part V Compensation and Other Financial Arrangements With Your Officers, Directors, Trustees, Employees, and Independent Contractors (Continued)

- d** Do you or will you record in writing the decision made by each individual who decided or voted on compensation arrangements? Yes No
- e** Do you or will you approve compensation arrangements based on information about compensation paid by **similarly situated** taxable or tax-exempt organizations for similar services, current compensation surveys compiled by independent firms, or actual written offers from similarly situated organizations? Refer to the instructions for Part V, lines 1a, 1b, and 1c, for information on what to include as compensation. Yes No
- f** Do you or will you record in writing both the information on which you relied to base your decision and its source? Yes No
- g** If you answered "No" to any item on lines 4a through 4f, describe how you set compensation that is **reasonable** for your officers, directors, trustees, highest compensated employees, and highest compensated independent contractors listed in Part V, lines 1a, 1b, and 1c.
-
- 5a** Have you adopted a **conflict of interest policy** consistent with the sample conflict of interest policy in Appendix A to the instructions? If "Yes," provide a copy of the policy and explain how the policy has been adopted, such as by resolution of your governing board. If "No," answer lines 5b and 5c. Yes No
- b** What procedures will you follow to assure that persons who have a conflict of interest will not have influence over you for setting their own compensation?
- c** What procedures will you follow to assure that persons who have a conflict of interest will not have influence over you regarding business deals with themselves?
- Note:** A conflict of interest policy is recommended though it is not required to obtain exemption. Hospitals, see Schedule C, Section I, line 14.
-
- 6a** Do you or will you compensate any of your officers, directors, trustees, highest compensated employees, or highest compensated independent contractors listed in lines 1a, 1b, or 1c through **non-fixed payments**, such as discretionary bonuses or revenue-based payments? If "Yes," describe all non-fixed compensation arrangements, including how the amounts are determined, who is eligible for such arrangements, whether you place a limitation on total compensation, and how you determine or will determine that you pay no more than reasonable compensation for services. Refer to the instructions for Part V, lines 1a, 1b, and 1c, for information on what to include as compensation. Yes No
- b** Do you or will you compensate any of your employees, other than your officers, directors, trustees, or your five highest compensated employees who receive or will receive compensation of more than \$50,000 per year, through non-fixed payments, such as discretionary bonuses or revenue-based payments? If "Yes," describe all non-fixed compensation arrangements, including how the amounts are or will be determined, who is or will be eligible for such arrangements, whether you place or will place a limitation on total compensation, and how you determine or will determine that you pay no more than reasonable compensation for services. Refer to the instructions for Part V, lines 1a, 1b, and 1c, for information on what to include as compensation. Yes No
-
- 7a** Do you or will you purchase any goods, services, or assets from any of your officers, directors, trustees, highest compensated employees, or highest compensated independent contractors listed in lines 1a, 1b, or 1c? If "Yes," describe any such purchase that you made or intend to make, from whom you make or will make such purchases, how the terms are or will be negotiated at **arm's length**, and explain how you determine or will determine that you pay no more than **fair market value**. Attach copies of any written contracts or other agreements relating to such purchases. Yes No
- b** Do you or will you sell any goods, services, or assets to any of your officers, directors, trustees, highest compensated employees, or highest compensated independent contractors listed in lines 1a, 1b, or 1c? If "Yes," describe any such sales that you made or intend to make, to whom you make or will make such sales, how the terms are or will be negotiated at arm's length, and explain how you determine or will determine you are or will be paid at least fair market value. Attach copies of any written contracts or other agreements relating to such sales. Yes No
-
- 8a** Do you or will you have any leases, contracts, loans, or other agreements with your officers, directors, trustees, highest compensated employees, or highest compensated independent contractors listed in lines 1a, 1b, or 1c? If "Yes," provide the information requested in lines 8b through 8f. Yes No
- b** Describe any written or oral arrangements that you made or intend to make.
- c** Identify with whom you have or will have such arrangements.
- d** Explain how the terms are or will be negotiated at arm's length.
- e** Explain how you determine you pay no more than fair market value or you are paid at least fair market value.
- f** Attach copies of any signed leases, contracts, loans, or other agreements relating to such arrangements.
-
- 9a** Do you or will you have any leases, contracts, loans, or other agreements with any organization in which any of your officers, directors, or trustees are also officers, directors, or trustees, or in which any individual officer, director, or trustee owns more than a 35% interest? If "Yes," provide the information requested in lines 9b through 9f. Yes No

Part V Compensation and Other Financial Arrangements With Your Officers, Directors, Trustees, Employees, and Independent Contractors (Continued)

- b Describe any written or oral arrangements you made or intend to make.
- c Identify with whom you have or will have such arrangements.
- d Explain how the terms are or will be negotiated at arm's length.
- e Explain how you determine or will determine you pay no more than fair market value or that you are paid at least fair market value.
- f Attach a copy of any signed leases, contracts, loans, or other agreements relating to such arrangements.

Part VI Your Members and Other Individuals and Organizations That Receive Benefits From You

The following "Yes" or "No" questions relate to goods, services, and funds you provide to individuals and organizations as part of your activities. Your answers should pertain to *past*, *present*, and *planned* activities. (See instructions.)

- 1a In carrying out your exempt purposes, do you provide goods, services, or funds to individuals? If "Yes," describe each program that provides goods, services, or funds to individuals. Yes No
- b In carrying out your exempt purposes, do you provide goods, services, or funds to organizations? If "Yes," describe each program that provides goods, services, or funds to organizations. Yes No
- 2 Do any of your programs limit the provision of goods, services, or funds to a specific individual or group of specific individuals? For example, answer "Yes," if goods, services, or funds are provided only for a particular individual, your members, individuals who work for a particular employer, or graduates of a particular school. If "Yes," explain the limitation and how recipients are selected for each program. Yes No
- 3 Do any individuals who receive goods, services, or funds through your programs have a family or business relationship with any officer, director, trustee, or with any of your highest compensated employees or highest compensated independent contractors listed in Part V, lines 1a, 1b, and 1c? If "Yes," explain how these related individuals are eligible for goods, services, or funds. Yes No

Part VII Your History

The following "Yes" or "No" questions relate to your history. (See instructions.)

- 1 Are you a **successor** to another organization? Answer "Yes," if you have taken or will take over the activities of another organization; you took over 25% or more of the fair market value of the net assets of another organization; or you were established upon the conversion of an organization from for-profit to non-profit status. If "Yes," complete Schedule G. Yes No
- 2 Are you submitting this application more than 27 months after the end of the month in which you were legally formed? If "Yes," complete Schedule E. Yes No

Part VIII Your Specific Activities

The following "Yes" or "No" questions relate to specific activities that you may conduct. Check the appropriate box. Your answers should pertain to *past*, *present*, and *planned* activities. (See instructions.)

- 1 Do you support or oppose candidates in **political campaigns** in any way? If "Yes," explain. Yes No
- 2a Do you attempt to **influence legislation**? If "Yes," explain how you attempt to influence legislation and complete line 2b. If "No," go to line 3a. Yes No
- b Have you made or are you making an **election** to have your legislative activities measured by expenditures by filing Form 5768? If "Yes," attach a copy of the Form 5768 that was already filed or attach a completed Form 5768 that you are filing with this application. If "No," describe whether your attempts to influence legislation are a substantial part of your activities. Include the time and money spent on your attempts to influence legislation as compared to your total activities. Yes No
- 3a Do you or will you operate bingo or **gaming** activities? If "Yes," describe who conducts them, and list all revenue received or expected to be received and expenses paid or expected to be paid in operating these activities. **Revenue and expenses** should be provided for the time periods specified in Part IX, Financial Data. Yes No
- b Do you or will you enter into contracts or other agreements with individuals or organizations to conduct bingo or gaming for you? If "Yes," describe any written or oral arrangements that you made or intend to make, identify with whom you have or will have such arrangements, explain how the terms are or will be negotiated at arm's length, and explain how you determine or will determine you pay no more than fair market value or you will be paid at least fair market value. Attach copies or any written contracts or other agreements relating to such arrangements. Yes No
- c List the states and local jurisdictions, including Indian Reservations, in which you conduct or will conduct gaming or bingo.

Part VIII Your Specific Activities (Continued)

- 4a** Do you or will you undertake **fundraising**? If "Yes," check all the fundraising programs you do or will conduct. (See instructions.) **Yes** **No**
- | | |
|---|--|
| <input type="checkbox"/> mail solicitations | <input type="checkbox"/> phone solicitations |
| <input type="checkbox"/> email solicitations | <input type="checkbox"/> accept donations on your website |
| <input type="checkbox"/> personal solicitations | <input type="checkbox"/> receive donations from another organization's website |
| <input type="checkbox"/> vehicle, boat, plane, or similar donations | <input type="checkbox"/> government grant solicitations |
| <input type="checkbox"/> foundation grant solicitations | <input type="checkbox"/> Other |
- Attach a description of each fundraising program.
- b** Do you or will you have written or oral contracts with any individuals or organizations to raise funds for you? If "Yes," describe these activities. Include all revenue and expenses from these activities and state who conducts them. Revenue and expenses should be provided for the time periods specified in Part IX, Financial Data. Also, attach a copy of any contracts or agreements. **Yes** **No**
- c** Do you or will you engage in fundraising activities for other organizations? If "Yes," describe these arrangements. Include a description of the organizations for which you raise funds and attach copies of all contracts or agreements. **Yes** **No**
- d** List all states and local jurisdictions in which you conduct fundraising. For each state or local jurisdiction listed, specify whether you fundraise for your own organization, you fundraise for another organization, or another organization fundraises for you.
- e** Do you or will you maintain separate accounts for any contributor under which the contributor has the right to advise on the use or distribution of funds? Answer "Yes" if the donor may provide advice on the types of investments, distributions from the types of investments, or the distribution from the donor's contribution account. If "Yes," describe this program, including the type of advice that may be provided and submit copies of any written materials provided to donors. **Yes** **No**
-
- 5** Are you **affiliated** with a governmental unit? If "Yes," explain. **Yes** **No**
- 6a** Do you or will you engage in **economic development**? If "Yes," describe your program. **Yes** **No**
- b** Describe in full who benefits from your economic development activities and how the activities promote exempt purposes.
-
- 7a** Do or will persons other than your employees or volunteers **develop** your facilities? If "Yes," describe each facility, the role of the developer, and any business or family relationship(s) between the developer and your officers, directors, or trustees. **Yes** **No**
- b** Do or will persons other than your employees or volunteers **manage** your activities or facilities? If "Yes," describe each activity and facility, the role of the manager, and any business or family relationship(s) between the manager and your officers, directors, or trustees. **Yes** **No**
- c** If there is a business or family relationship between any manager or developer and your officers, directors, or trustees, identify the individuals, explain the relationship, describe how contracts are negotiated at arm's length so that you pay no more than fair market value, and submit a copy of any contracts or other agreements.
-
- 8** Do you or will you enter into **joint ventures**, including partnerships or **limited liability companies** treated as partnerships, in which you share profits and losses with partners other than section 501(c)(3) organizations? If "Yes," describe the activities of these joint ventures in which you participate. **Yes** **No**
-
- 9a** Are you applying for exemption as a childcare organization under section 501(k)? If "Yes," answer lines 9b through 9d. If "No," go to line 10. **Yes** **No**
- b** Do you provide child care so that parents or caretakers of children you care for can be **gainfully employed** (see instructions)? If "No," explain how you qualify as a childcare organization described in section 501(k). **Yes** **No**
- c** Of the children for whom you provide child care, are 85% or more of them cared for by you to enable their parents or caretakers to be gainfully employed (see instructions)? If "No," explain how you qualify as a childcare organization described in section 501(k). **Yes** **No**
- d** Are your services available to the general public? If "No," describe the specific group of people for whom your activities are available. Also, see the instructions and explain how you qualify as a childcare organization described in section 501(k). **Yes** **No**
-
- 10** Do you or will you publish, own, or have rights in music, literature, tapes, artworks, choreography, scientific discoveries, or other **intellectual property**? If "Yes," explain. Describe who owns or will own any copyrights, patents, or trademarks, whether fees are or will be charged, how the fees are determined, and how any items are or will be produced, distributed, and marketed. **Yes** **No**

Part VIII Your Specific Activities (Continued)

- 11** Do you or will you accept contributions of: real property; conservation easements; closely held securities; intellectual property such as patents, trademarks, and copyrights; works of music or art; licenses; royalties; automobiles, boats, planes, or other vehicles; or collectibles of any type? If "Yes," describe each type of contribution, any conditions imposed by the donor on the contribution, and any agreements with the donor regarding the contribution. **Yes** **No**
-
- 12a** Do you or will you operate in a **foreign country or countries**? If "Yes," answer lines 12b through 12d. If "No," go to line 13a. **Yes** **No**
- b** Name the foreign countries and regions within the countries in which you operate.
- c** Describe your operations in each country and region in which you operate.
- d** Describe how your operations in each country and region further your exempt purposes.
-
- 13a** Do you or will you make grants, loans, or other distributions to organization(s)? If "Yes," answer lines 13b through 13g. If "No," go to line 14a. **Yes** **No**
- b** Describe how your grants, loans, or other distributions to organizations further your exempt purposes.
- c** Do you have written contracts with each of these organizations? If "Yes," attach a copy of each contract. **Yes** **No**
- d** Identify each recipient organization and any **relationship** between you and the recipient organization.
- e** Describe the records you keep with respect to the grants, loans, or other distributions you make.
- f** Describe your selection process, including whether you do any of the following:
- (i)** Do you require an application form? If "Yes," attach a copy of the form. **Yes** **No**
- (ii)** Do you require a grant proposal? If "Yes," describe whether the grant proposal specifies your responsibilities and those of the grantee, obligates the grantee to use the grant funds only for the purposes for which the grant was made, provides for periodic written reports concerning the use of grant funds, requires a final written report and an accounting of how grant funds were used, and acknowledges your authority to withhold and/or recover grant funds in case such funds are, or appear to be, misused. **Yes** **No**
- g** Describe your procedures for oversight of distributions that assure you the resources are used to further your exempt purposes, including whether you require periodic and final reports on the use of resources.
-
- 14a** Do you or will you make grants, loans, or other distributions to foreign organizations? If "Yes," answer lines 14b through 14f. If "No," go to line 15. **Yes** **No**
- b** Provide the name of each foreign organization, the country and regions within a country in which each foreign organization operates, and describe any relationship you have with each foreign organization.
- c** Does any foreign organization listed in line 14b accept contributions earmarked for a specific country or specific organization? If "Yes," list all earmarked organizations or countries. **Yes** **No**
- d** Do your contributors know that you have ultimate authority to use contributions made to you at your discretion for purposes consistent with your exempt purposes? If "Yes," describe how you relay this information to contributors. **Yes** **No**
- e** Do you or will you make pre-grant inquiries about the recipient organization? If "Yes," describe these inquiries, including whether you inquire about the recipient's financial status, its tax-exempt status under the Internal Revenue Code, its ability to accomplish the purpose for which the resources are provided, and other relevant information. **Yes** **No**
- f** Do you or will you use any additional procedures to ensure that your distributions to foreign organizations are used in furtherance of your exempt purposes? If "Yes," describe these procedures, including site visits by your employees or compliance checks by impartial experts, to verify that grant funds are being used appropriately. **Yes** **No**

Part VIII Your Specific Activities *(Continued)*

- | | | | |
|-----------|--|-------------------------------------|------------------------------------|
| 15 | Do you have a close connection with any organizations? If "Yes," explain. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 16 | Are you applying for exemption as a cooperative hospital service organization under section 501(e)? If "Yes," explain. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 17 | Are you applying for exemption as a cooperative service organization of operating educational organizations under section 501(f)? If "Yes," explain. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 18 | Are you applying for exemption as a charitable risk pool under section 501(n)? If "Yes," explain. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 19 | Do you or will you operate a school ? If "Yes," complete Schedule B. Answer "Yes," whether you operate a school as your main function or as a secondary activity. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 20 | Is your main function to provide hospital or medical care ? If "Yes," complete Schedule C. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 21 | Do you or will you provide low-income housing or housing for the elderly or handicapped ? If "Yes," complete Schedule F. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 22 | Do you or will you provide scholarships, fellowships, educational loans, or other educational grants to individuals, including grants for travel, study, or other similar purposes? If "Yes," complete Schedule H. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

Note: Private foundations may use Schedule H to request advance approval of individual grant procedures.

Part IX Financial Data

For purposes of this schedule, years in existence refer to completed tax years. If in existence 4 or more years, complete the schedule for the most recent 4 tax years. If in existence more than 1 year but less than 4 years, complete the statements for each year in existence and provide projections of your likely revenues and expenses based on a reasonable and good faith estimate of your future finances for a total of 3 years of financial information. If in existence less than 1 year, provide projections of your likely revenues and expenses for the current year and the 2 following years, based on a reasonable and good faith estimate of your future finances for a total of 3 years of financial information. (See instructions.)

A. Statement of Revenues and Expenses

	Type of revenue or expense	Current tax year	3 prior tax years or 2 succeeding tax years			(e) Provide Total for (a) through (d)
		(a) From To	(b) From To	(c) From To	(d) From To	
Revenues	1 Gifts, grants, and contributions received (do not include unusual grants)					
	2 Membership fees received					
	3 Gross investment income					
	4 Net unrelated business income					
	5 Taxes levied for your benefit					
	6 Value of services or facilities furnished by a governmental unit without charge (not including the value of services generally furnished to the public without charge)					
	7 Any revenue not otherwise listed above or in lines 9–12 below (attach an itemized list)					
	8 Total of lines 1 through 7					
	9 Gross receipts from admissions, merchandise sold or services performed, or furnishing of facilities in any activity that is related to your exempt purposes (attach itemized list)					
	10 Total of lines 8 and 9					
	11 Net gain or loss on sale of capital assets (attach schedule and see instructions)					
	12 Unusual grants					
	13 Total Revenue Add lines 10 through 12					
Expenses	14 Fundraising expenses					
	15 Contributions, gifts, grants, and similar amounts paid out (attach an itemized list)					
	16 Disbursements to or for the benefit of members (attach an itemized list)					
	17 Compensation of officers, directors, and trustees					
	18 Other salaries and wages					
	19 Interest expense					
	20 Occupancy (rent, utilities, etc.)					
	21 Depreciation and depletion					
	22 Professional fees					
	23 Any expense not otherwise classified, such as program services (attach itemized list)					
	24 Total Expenses Add lines 14 through 23					

Part IX Financial Data (Continued)

B. Balance Sheet (for your most recently completed tax year)

Year End:

(Whole dollars)

Assets		
1	Cash	1
2	Accounts receivable, net	2
3	Inventories	3
4	Bonds and notes receivable (attach an itemized list)	4
5	Corporate stocks (attach an itemized list)	5
6	Loans receivable (attach an itemized list)	6
7	Other investments (attach an itemized list)	7
8	Depreciable and depletable assets (attach an itemized list)	8
9	Land	9
10	Other assets (attach an itemized list)	10
11	Total Assets (add lines 1 through 10)	11
Liabilities		
12	Accounts payable	12
13	Contributions, gifts, grants, etc. payable	13
14	Mortgages and notes payable (attach an itemized list)	14
15	Other liabilities (attach an itemized list)	15
16	Total Liabilities (add lines 12 through 15)	16
Fund Balances or Net Assets		
17	Total fund balances or net assets	17
18	Total Liabilities and Fund Balances or Net Assets (add lines 16 and 17)	18
19	Have there been any substantial changes in your assets or liabilities since the end of the period shown above? If "Yes," explain.	<input type="checkbox"/> Yes <input type="checkbox"/> No

Part X Public Charity Status

Part X is designed to classify you as an organization that is either a **private foundation** or a **public charity**. Public charity status is a more favorable tax status than private foundation status. If you are a private foundation, Part X is designed to further determine whether you are a **private operating foundation**. (See instructions.)

- 1a Are you a private foundation? If "Yes," go to line 1b. If "No," go to line 5 and proceed as instructed. If you are unsure, see the instructions. Yes No
- b As a private foundation, section 508(e) requires special provisions in your organizing document in addition to those that apply to all organizations described in section 501(c)(3). Check the box to confirm that your organizing document meets this requirement, whether by express provision or by reliance on operation of state law. Attach a statement that describes specifically where your organizing document meets this requirement, such as a reference to a particular article or section in your organizing document or by operation of state law. See the instructions, including Appendix B, for information about the special provisions that need to be contained in your organizing document. Go to line 2.
- 2 Are you a private operating foundation? To be a private operating foundation you must engage directly in the active conduct of charitable, religious, educational, and similar activities, as opposed to indirectly carrying out these activities by providing grants to individuals or other organizations. If "Yes," go to line 3. If "No," go to the signature section of Part XI. Yes No
- 3 Have you existed for one or more years? If "Yes," attach financial information showing that you are a private operating foundation; go to the signature section of Part XI. If "No," continue to line 4. Yes No
- 4 Have you attached either (1) an affidavit or opinion of counsel, (including a written affidavit or opinion from a certified public accountant or accounting firm with expertise regarding this tax law matter), that sets forth facts concerning your operations and support to demonstrate that you are likely to satisfy the requirements to be classified as a private operating foundation; or (2) a statement describing your proposed operations as a private operating foundation? Yes No
- 5 If you answered "No" to line 1a, indicate the type of public charity status you are requesting by checking one of the choices below. You may check only one box.
The organization is not a private foundation because it is:
 - a 509(a)(1) and 170(b)(1)(A)(i)—a church or a convention or association of churches. Complete and attach Schedule A.
 - b 509(a)(1) and 170(b)(1)(A)(ii)—a **school**. Complete and attach Schedule B.
 - c 509(a)(1) and 170(b)(1)(A)(iii)—a **hospital**, a cooperative hospital service organization, or a medical research organization operated in conjunction with a hospital. Complete and attach Schedule C.
 - d 509(a)(3)—an organization supporting either one or more organizations described in line 5a through c, f, g, or h or a publicly supported section 501(c)(4), (5), or (6) organization. Complete and attach Schedule D.

Part X Public Charity Status (Continued)

- e 509(a)(4)—an organization organized and operated exclusively for testing for public safety.
- f 509(a)(1) and 170(b)(1)(A)(iv)—an organization operated for the benefit of a college or university that is owned or operated by a governmental unit.
- g 509(a)(1) and 170(b)(1)(A)(vi)—an organization that receives a substantial part of its financial support in the form of contributions from publicly supported organizations, from a governmental unit, or from the general public.
- h 509(a)(2)—an organization that normally receives not more than one-third of its financial support from gross **investment income** and receives more than one-third of its financial support from contributions, membership fees, and gross receipts from activities related to its exempt functions (subject to certain exceptions).
- i A publicly supported organization, but unsure if it is described in 5g or 5h. The organization would like the IRS to decide the correct status.

6 If you checked box g, h, or i in question 5 above, you must request either an **advance** or a **definitive ruling** by selecting one of the boxes below. Refer to the instructions to determine which type of ruling you are eligible to receive.

- a Request for Advance Ruling:** By checking this box and signing the consent, pursuant to section 6501(c)(4) of the Code you request an advance ruling and agree to extend the statute of limitations on the assessment of excise tax under section 4940 of the Code. The tax will apply only if you do not establish public support status at the end of the 5-year advance ruling period. The assessment period will be extended for the 5 advance ruling years to 8 years, 4 months, and 15 days beyond the end of the first year. You have the right to refuse or limit the extension to a mutually agreed-upon period of time or issue(s). Publication 1035, *Extending the Tax Assessment Period*, provides a more detailed explanation of your rights and the consequences of the choices you make. You may obtain Publication 1035 free of charge from the IRS web site at www.irs.gov or by calling toll-free 1-800-829-3676. Signing this consent will not deprive you of any appeal rights to which you would otherwise be entitled. If you decide not to extend the statute of limitations, you are not eligible for an advance ruling.

Consent Fixing Period of Limitations Upon Assessment of Tax Under Section 4940 of the Internal Revenue Code

For Organization

.....
 (Signature of Officer, Director, Trustee, or other authorized official)

.....
 (Type or print name of signer)

.....
 (Date)

.....
 (Type or print title or authority of signer)

For IRS Use Only

.....
 IRS Director, Exempt Organizations

.....
 (Date)

- b Request for Definitive Ruling:** Check this box if you have completed one tax year of at least 8 full months and you are requesting a definitive ruling. To confirm your public support status, answer line 6b(i) if you checked box g in line 5 above. Answer line 6b(ii) if you checked box h in line 5 above. If you checked box i in line 5 above, answer both lines 6b(i) and (ii).

(i) **(a)** Enter 2% of line 8, column (e) on Part IX-A. Statement of Revenues and Expenses. _____

(b) Attach a list showing the name and amount contributed by each person, company, or organization whose gifts totaled more than the 2% amount. If the answer is "None," check this box.

(ii) **(a)** For each year amounts are included on lines 1, 2, and 9 of Part IX-A. Statement of Revenues and Expenses, attach a list showing the name of and amount received from each **disqualified person**. If the answer is "None," check this box.

(b) For each year amounts are included on line 9 of Part IX-A. Statement of Revenues and Expenses, attach a list showing the name of and amount received from each payer, other than a disqualified person, whose payments were more than the larger of (1) 1% of line 10, Part IX-A. Statement of Revenues and Expenses, or (2) \$5,000. If the answer is "None," check this box.

7 Did you receive any unusual grants during any of the years shown on Part IX-A. Statement of Revenues and Expenses? If "Yes," attach a list including the name of the contributor, the date and amount of the grant, a brief description of the grant, and explain why it is unusual. **Yes** **No**

Part XI User Fee Information

You must include a user fee payment with this application. It will not be processed without your paid user fee. If your average annual gross receipts have exceeded or will exceed \$10,000 annually over a 4-year period, you must submit payment of \$850. If your gross receipts have not exceeded or will not exceed \$10,000 annually over a 4-year period, the required user fee payment is \$400. See instructions for Part XI, for a definition of **gross receipts** over a 4-year period. Your check or money order must be made payable to the United States Treasury. *User fees are subject to change. Check our website at www.irs.gov and type "User Fee" in the keyword box, or call Customer Account Services at 1-877-829-5500 for current information.*

- 1 Have your annual gross receipts averaged or are they expected to average not more than \$10,000? **Yes** **No**
 If "Yes," check the box on line 2 and enclose a user fee payment of \$400 (Subject to change—see above).
 If "No," check the box on line 3 and enclose a user fee payment of \$850 (Subject to change—see above).
- 2 Check the box if you have enclosed the reduced user fee payment of \$400 (Subject to change).
- 3 Check the box if you have enclosed the user fee payment of \$850 (Subject to change).

I declare under the penalties of perjury that I am authorized to sign this application on behalf of the above organization and that I have examined this application, including the accompanying schedules and attachments, and to the best of my knowledge it is true, correct, and complete.

Please Sign Here



.....
 (Signature of Officer, Director, Trustee, or other authorized official)

.....
 (Type or print name of signer)

.....
 (Date)

.....
 (Type or print title or authority of signer)

Reminder: Send the completed Form 1023 Checklist with your filled-in-application.

Schedule A. Churches

1a	Do you have a written creed, statement of faith, or summary of beliefs? If "Yes," attach copies of relevant documents.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
b	Do you have a form of worship? If "Yes," describe your form of worship.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
2a	Do you have a formal code of doctrine and discipline? If "Yes," describe your code of doctrine and discipline.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
b	Do you have a distinct religious history? If "Yes," describe your religious history.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
c	Do you have a literature of your own? If "Yes," describe your literature.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3	Describe the organization's religious hierarchy or ecclesiastical government.		
4a	Do you have regularly scheduled religious services? If "Yes," describe the nature of the services and provide representative copies of relevant literature such as church bulletins.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
b	What is the average attendance at your regularly scheduled religious services?		
5a	Do you have an established place of worship? If "Yes," refer to the instructions for the information required.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
b	Do you own the property where you have an established place of worship?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
6	Do you have an established congregation or other regular membership group? If "No," refer to the instructions.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
7	How many members do you have?		
8a	Do you have a process by which an individual becomes a member? If "Yes," describe the process and complete lines 8b-8d, below.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
b	If you have members, do your members have voting rights, rights to participate in religious functions, or other rights? If "Yes," describe the rights your members have.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
c	May your members be associated with another denomination or church?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
d	Are all of your members part of the same family ?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
9	Do you conduct baptisms, weddings, funerals, etc.?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
10	Do you have a school for the religious instruction of the young?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
11a	Do you have a minister or religious leader? If "Yes," describe this person's role and explain whether the minister or religious leader was ordained, commissioned, or licensed after a prescribed course of study.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
b	Do you have schools for the preparation of your ordained ministers or religious leaders?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
12	Is your minister or religious leader also one of your officers, directors, or trustees?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
13	Do you ordain, commission, or license ministers or religious leaders? If "Yes," describe the requirements for ordination, commission, or licensure.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
14	Are you part of a group of churches with similar beliefs and structures? If "Yes," explain. Include the name of the group of churches.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
15	Do you issue church charters? If "Yes," describe the requirements for issuing a charter.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
16	Did you pay a fee for a church charter? If "Yes," attach a copy of the charter.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
17	Do you have other information you believe should be considered regarding your status as a church? If "Yes," explain.	<input type="checkbox"/> Yes	<input type="checkbox"/> No

Schedule B. Schools, Colleges, and Universities

If you operate a school as an activity, complete Schedule B

Section I Operational Information

- 1a** Do you normally have a regularly scheduled curriculum, a regular faculty of qualified teachers, a regularly enrolled student body, and facilities where your educational activities are regularly carried on? If "No," do not complete the remainder of Schedule B. **Yes** **No**
- b** Is the primary function of your school the presentation of formal instruction? If "Yes," describe your school in terms of whether it is an elementary, secondary, college, technical, or other type of school. If "No," do not complete the remainder of Schedule B. **Yes** **No**
- 2a** Are you a public school because you are operated by a state or subdivision of a state? If "Yes," explain how you are operated by a state or subdivision of a state. Do not complete the remainder of Schedule B. **Yes** **No**
- b** Are you a public school because you are operated wholly or predominantly from government funds or property? If "Yes," explain how you are operated wholly or predominantly from government funds or property. Submit a copy of your funding agreement regarding government funding. Do not complete the remainder of Schedule B. **Yes** **No**
- 3** In what public school district, county, and state are you located?
- 4** Were you formed or substantially expanded at the time of public school desegregation in the above school district or county? **Yes** **No**
- 5** Has a state or federal administrative agency or judicial body ever determined that you are racially discriminatory? If "Yes," explain. **Yes** **No**
- 6** Has your right to receive financial aid or assistance from a governmental agency ever been revoked or suspended? If "Yes," explain. **Yes** **No**
- 7** Do you or will you contract with another organization to develop, build, market, or finance your facilities? If "Yes," explain how that entity is selected, explain how the terms of any contracts or other agreements were or will be negotiated at arm's length, and explain how you determine that you will pay no more than fair market value for services. **Yes** **No**

Note. Make sure your answer is consistent with the information provided in Part VIII, line 7a.

- 8** Do you or will you manage your activities or facilities through your own employees or volunteers? If "No," attach a statement describing the activities that will be managed by others, the names of the persons or organizations that manage or will manage your activities or facilities, and how these managers were or will be selected. Also, submit copies of any contracts, proposed contracts, or other agreements regarding the provision of management services for your activities or facilities. Explain how the terms of any contracts or other agreements were or will be negotiated, and explain how you determine you will pay no more than fair market value for services. **Yes** **No**

Note. Answer "Yes" if you manage or intend to manage your programs through your own employees or by using volunteers. Answer "No" if you engage or intend to engage a separate organization or independent contractor. Make sure your answer is consistent with the information provided in Part VIII, line 7b.**Section II Establishment of Racially Nondiscriminatory Policy**Information required by **Revenue Procedure 75-50.**

- 1** Have you adopted a racially nondiscriminatory policy as to students in your organizing document, bylaws, or by resolution of your governing body? If "Yes," state where the policy can be found or supply a copy of the policy. If "No," you must adopt a nondiscriminatory policy as to students before submitting this application. See Publication 557. **Yes** **No**
- 2** Do your brochures, application forms, advertisements, and catalogues dealing with student admissions, programs, and scholarships contain a statement of your racially nondiscriminatory policy? **Yes** **No**
- a** If "Yes," attach a representative sample of each document.
- b** If "No," by checking the box to the right you agree that all future printed materials, including website content, will contain the required nondiscriminatory policy statement.
- 3** Have you published a notice of your nondiscriminatory policy in a newspaper of general circulation that serves all racial segments of the community? (See the instructions for specific requirements.) If "No," explain. **Yes** **No**
- 4** Does or will the organization (or any department or division within it) discriminate in any way on the basis of race with respect to admissions; use of facilities or exercise of student privileges; faculty or administrative staff; or scholarship or loan programs? If "Yes," for any of the above, explain fully. **Yes** **No**

Schedule B. Schools, Colleges, and Universities (Continued)

5 Complete the table below to show the racial composition for the current academic year and projected for the next academic year, of: (a) the student body, (b) the faculty, and (c) the administrative staff. Provide actual numbers rather than percentages for each racial category.

If you are not operational, submit an estimate based on the best information available (such as the racial composition of the community served).

Racial Category	(a) Student Body		(b) Faculty		(c) Administrative Staff	
	Current Year	Next Year	Current Year	Next Year	Current Year	Next Year
Total						

6 In the table below, provide the number and amount of loans and scholarships awarded to students enrolled by racial categories.

Racial Category	Number of Loans		Amount of Loans		Number of Scholarships		Amount of Scholarships	
	Current Year	Next Year	Current Year	Next Year	Current Year	Next Year	Current Year	Next Year
Total								

7a Attach a list of your incorporators, founders, board members, and donors of land or buildings, whether individuals or organizations.

b Do any of these individuals or organizations have an objective to maintain segregated public or private school education? If "Yes," explain. **Yes** **No**

8 Will you maintain records according to the non-discrimination provisions contained in Revenue Procedure 75-50? If "No," explain. (See instructions.) **Yes** **No**

Schedule C. Hospitals and Medical Research Organizations

Check the box if you are a **hospital**. See the instructions for a definition of the term "hospital," which includes an organization whose principal purpose or function is providing **hospital or medical care**. Complete Section I below.

Check the box if you are a **medical research organization** operated in conjunction with a hospital. See the instructions for a definition of the term "medical research organization," which refers to an organization whose principal purpose or function is medical research and which is directly engaged in the continuous active conduct of medical research in conjunction with a hospital. Complete Section II.

Section I Hospitals

- 1a** Are all the doctors in the community eligible for staff privileges? If "No," give the reasons why and explain how the medical staff is selected. **Yes** **No**
- 2a** Do you or will you provide medical services to all individuals in your community who can pay for themselves or have private health insurance? If "No," explain. **Yes** **No**

b Do you or will you provide medical services to all individuals in your community who participate in Medicare? If "No," explain. **Yes** **No**

c Do you or will you provide medical services to all individuals in your community who participate in Medicaid? If "No," explain. **Yes** **No**
- 3a** Do you or will you require persons covered by Medicare or Medicaid to pay a deposit before receiving services? If "Yes," explain. **Yes** **No**

b Does the same deposit requirement, if any, apply to all other patients? If "No," explain. **Yes** **No**
- 4a** Do you or will you maintain a full-time emergency room? If "No," explain why you do not maintain a full-time emergency room. Also, describe any emergency services that you provide. **Yes** **No**

b Do you have a policy on providing emergency services to persons without apparent means to pay? If "Yes," provide a copy of the policy. **Yes** **No**

c Do you have any arrangements with police, fire, and voluntary ambulance services for the delivery or admission of emergency cases? If "Yes," describe the arrangements, including whether they are written or oral agreements. If written, submit copies of all such agreements. **Yes** **No**
- 5a** Do you provide for a portion of your services and facilities to be used for charity patients? If "Yes," answer 5b through 5e. **Yes** **No**

b Explain your policy regarding charity cases, including how you distinguish between charity care and bad debts. Submit a copy of your written policy.

c Provide data on your past experience in admitting charity patients, including amounts you expend for treating charity care patients and types of services you provide to charity care patients.

d Describe any arrangements you have with federal, state, or local governments or government agencies for paying for the cost of treating charity care patients. Submit copies of any written agreements.

e Do you provide services on a sliding fee schedule depending on financial ability to pay? If "Yes," submit your sliding fee schedule. **Yes** **No**
- 6a** Do you or will you carry on a formal program of medical training or medical research? If "Yes," describe such programs, including the type of programs offered, the scope of such programs, and affiliations with other hospitals or medical care providers with which you carry on the medical training or research programs. **Yes** **No**

b Do you or will you carry on a formal program of community education? If "Yes," describe such programs, including the type of programs offered, the scope of such programs, and affiliation with other hospitals or medical care providers with which you offer community education programs. **Yes** **No**
- 7** Do you or will you provide office space to physicians carrying on their own medical practices? If "Yes," describe the criteria for who may use the space, explain the means used to determine that you are paid at least fair market value, and submit representative lease agreements. **Yes** **No**
- 8** Is your board of directors comprised of a majority of individuals who are representative of the community you serve? Include a list of each board member's name and business, financial, or professional relationship with the hospital. Also, identify each board member who is representative of the community and describe how that individual is a community representative. **Yes** **No**
- 9** Do you participate in any joint ventures? If "Yes," state your ownership percentage in each joint venture, list your investment in each joint venture, describe the tax status of other participants in each joint venture (including whether they are section 501(c)(3) organizations), describe the activities of each joint venture, describe how you exercise control over the activities of each joint venture, and describe how each joint venture furthers your exempt purposes. Also, submit copies of all agreements. **Yes** **No**

Note. Make sure your answer is consistent with the information provided in Part VIII, line 8.

Schedule C. Hospitals and Medical Research Organizations (Continued)**Section I Hospitals (Continued)**

- 10** Do you or will you manage your activities or facilities through your own employees or volunteers? If "No," attach a statement describing the activities that will be managed by others, the names of the persons or organizations that manage or will manage your activities or facilities, and how these managers were or will be selected. Also, submit copies of any contracts, proposed contracts, or other agreements regarding the provision of management services for your activities or facilities. Explain how the terms of any contracts or other agreements were or will be negotiated, and explain how you determine you will pay no more than fair market value for services.
Note. Answer "Yes" if you do manage or intend to manage your programs through your own employees or by using volunteers. Answer "No" if you engage or intend to engage a separate organization or independent contractor. Make sure your answer is consistent with the information provided in Part VIII, line 7b. **Yes** **No**
-
- 11** Do you or will you offer recruitment incentives to physicians? If "Yes," describe your recruitment incentives and attach copies of all written recruitment incentive policies. **Yes** **No**
-
- 12** Do you or will you lease equipment, assets, or office space from physicians who have a financial or professional relationship with you? If "Yes," explain how you establish a fair market value for the lease. **Yes** **No**
-
- 13** Have you purchased medical practices, ambulatory surgery centers, or other business assets from physicians or other persons with whom you have a business relationship, aside from the purchase? If "Yes," submit a copy of each purchase and sales contract and describe how you arrived at fair market value, including copies of appraisals. **Yes** **No**
-
- 14** Have you adopted a **conflict of interest policy** consistent with the sample health care organization conflict of interest policy in Appendix A of the instructions? If "Yes," submit a copy of the policy and explain how the policy has been adopted, such as by resolution of your governing board. If "No," explain how you will avoid any conflicts of interest in your business dealings. **Yes** **No**

Section II Medical Research Organizations

- 1** Name the hospitals with which you have a relationship and describe the relationship. Attach copies of written agreements with each hospital that demonstrate continuing relationships between you and the hospital(s).
-
- 2** Attach a schedule describing your present and proposed activities for the direct conduct of medical research; describe the nature of the activities, and the amount of money that has been or will be spent in carrying them out.
-
- 3** Attach a schedule of assets showing their fair market value and the portion of your assets directly devoted to medical research.

Schedule D. Section 509(a)(3) Supporting Organizations

Section I Identifying Information About the Supported Organization(s)

1 State the names, addresses, and EINs of the supported organizations. If additional space is needed, attach a separate sheet.

Name	Address	EIN
		-
		-

2 Are all supported organizations listed in line 1 public charities under section 509(a)(1) or (2)? If "Yes," go to Section II. If "No," go to line 3. Yes No

3 Do the supported organizations have tax-exempt status under section 501(c)(4), 501(c)(5), or 501(c)(6)? Yes No

If "Yes," for each 501(c)(4), (5), or (6) organization supported, provide the following financial information:

- Part IX-A. Statement of Revenues and Expenses, lines 1-13 and
- Part X, lines 6b(ii)(a), 6b(ii)(b), and 7.

If "No," attach a statement describing how each organization you support is a public charity under section 509(a)(1) or (2).

Section II Relationship with Supported Organization(s)—Three Tests

To be classified as a supporting organization, an organization must meet one of three relationship tests:

- Test 1: "Operated, supervised, or controlled by" one or more publicly supported organizations, or
- Test 2: "Supervised or controlled in connection with" one or more publicly supported organizations, or
- Test 3: "Operated in connection with" one or more publicly supported organizations.

1 Information to establish the "operated, supervised, or controlled by" relationship (Test 1)
Is a majority of your governing board or officers elected or appointed by the supported organization(s)? If "Yes," describe the process by which your governing board is appointed and elected; go to Section III. If "No," continue to line 2. Yes No

2 Information to establish the "supervised or controlled in connection with" relationship (Test 2)
Does a majority of your governing board consist of individuals who also serve on the governing board of the supported organization(s)? If "Yes," describe the process by which your governing board is appointed and elected; go to Section III. If "No," go to line 3. Yes No

3 Information to establish the "operated in connection with" responsiveness test (Test 3)
Are you a trust from which the named supported organization(s) can enforce and compel an accounting under state law? If "Yes," explain whether you advised the supported organization(s) in writing of these rights and provide a copy of the written communication documenting this; go to Section II, line 5. If "No," go to line 4a. Yes No

4 Information to establish the alternative "operated in connection with" responsiveness test (Test 3)
a Do the officers, directors, trustees, or members of the supported organization(s) elect or appoint one or more of your officers, directors, or trustees? If "Yes," explain and provide documentation; go to line 4d, below. If "No," go to line 4b. Yes No

b Do one or more members of the governing body of the supported organization(s) also serve as your officers, directors, or trustees or hold other important offices with respect to you? If "Yes," explain and provide documentation; go to line 4d, below. If "No," go to line 4c. Yes No

c Do your officers, directors, or trustees maintain a close and continuous working relationship with the officers, directors, or trustees of the supported organization(s)? If "Yes," explain and provide documentation. Yes No

d Do the supported organization(s) have a significant voice in your investment policies, in the making and timing of grants, and in otherwise directing the use of your income or assets? If "Yes," explain and provide documentation. Yes No

e Describe and provide copies of written communications documenting how you made the supported organization(s) aware of your supporting activities.

Schedule D. Section 509(a)(3) Supporting Organizations (Continued)**Section II Relationship with Supported Organization(s)—Three Tests (Continued)**

- 5** Information to establish the “operated in connection with” integral part test (Test 3)
Do you conduct activities that would otherwise be carried out by the supported organization(s)? If “Yes,” explain and go to Section III. If “No,” continue to line 6a. **Yes** **No**
- 6** Information to establish the alternative “operated in connection with” integral part test (Test 3)
- a** Do you distribute at least 85% of your annual **net income** to the supported organization(s)? If “Yes,” go to line 6b. (See instructions.) **Yes** **No**
If “No,” state the percentage of your income that you distribute to each supported organization. Also explain how you ensure that the supported organization(s) are attentive to your operations.
- b** How much do you contribute annually to each supported organization? Attach a schedule.
- c** What is the total annual revenue of each supported organization? If you need additional space, attach a list.
- d** Do you or the supported organization(s) **earmark** your funds for support of a particular program or activity? If “Yes,” explain. **Yes** **No**
- 7a** Does your organizing document specify the supported organization(s) by name? If “Yes,” state the article and paragraph number and go to Section III. If “No,” answer line 7b. **Yes** **No**
- b** Attach a statement describing whether there has been an historic and continuing relationship between you and the supported organization(s).

Section III Organizational Test

- 1a** If you met relationship Test 1 or Test 2 in Section II, your organizing document must specify the supported organization(s) by name, or by naming a similar purpose or charitable class of beneficiaries. If your organizing document complies with this requirement, answer “Yes.” If your organizing document does not comply with this requirement, answer “No,” and see the instructions. **Yes** **No**
- b** If you met relationship Test 3 in Section II, your organizing document must generally specify the supported organization(s) by name. If your organizing document complies with this requirement, answer “Yes,” and go to Section IV. If your organizing document does not comply with this requirement, answer “No,” and see the instructions. **Yes** **No**

Section IV Disqualified Person Test

You do not qualify as a supporting organization if you are **controlled** directly or indirectly by one or more **disqualified persons** (as defined in section 4946) other than **foundation managers** or one or more organizations that you support. Foundation managers who are also disqualified persons for another reason are disqualified persons with respect to you.

- 1a** Do any persons who are disqualified persons with respect to you, (except individuals who are disqualified persons only because they are foundation managers), appoint any of your foundation managers? If “Yes,” (1) describe the process by which disqualified persons appoint any of your foundation managers, (2) provide the names of these disqualified persons and the foundation managers they appoint, and (3) explain how control is vested over your operations (including assets and activities) by persons other than disqualified persons. **Yes** **No**
- b** Do any persons who have a family or business relationship with any disqualified persons with respect to you, (except individuals who are disqualified persons only because they are foundation managers), appoint any of your foundation managers? If “Yes,” (1) describe the process by which individuals with a family or business relationship with disqualified persons appoint any of your foundation managers, (2) provide the names of these disqualified persons, the individuals with a family or business relationship with disqualified persons, and the foundation managers appointed, and (3) explain how control is vested over your operations (including assets and activities) in individuals other than disqualified persons. **Yes** **No**
- c** Do any persons who are disqualified persons, (except individuals who are disqualified persons only because they are foundation managers), have any influence regarding your operations, including your assets or activities? If “Yes,” (1) provide the names of these disqualified persons, (2) explain how influence is exerted over your operations (including assets and activities), and (3) explain how control is vested over your operations (including assets and activities) by individuals other than disqualified persons. **Yes** **No**

Schedule E. Organizations Not Filing Form 1023 Within 27 Months of Formation

Schedule E is intended to determine whether you are eligible for tax exemption under section 501(c)(3) from the postmark date of your application or from your date of incorporation or formation, whichever is earlier. If you are not eligible for tax exemption under section 501(c)(3) from your date of incorporation or formation, Schedule E is also intended to determine whether you are eligible for tax exemption under section 501(c)(4) for the period between your date of incorporation or formation and the postmark date of your application.

- 1** Are you a church, association of churches, or integrated auxiliary of a church? If "Yes," complete Schedule A and stop here. Do not complete the remainder of Schedule E. **Yes** **No**
-
- 2a** Are you a public charity with annual **gross receipts** that are normally \$5,000 or less? If "Yes," stop here. Answer "No" if you are a private foundation, regardless of your gross receipts. **Yes** **No**
- b** If your gross receipts were normally more than \$5,000, are you filing this application within 90 days from the end of the tax year in which your gross receipts were normally more than \$5,000? If "Yes," stop here. **Yes** **No**
-
- 3a** Were you included as a subordinate in a group exemption application or letter? If "No," go to line 4. **Yes** **No**
- b** If you were included as a subordinate in a group exemption letter, are you filing this application within 27 months from the date you were notified by the organization holding the group exemption letter or the Internal Revenue Service that you cease to be covered by the group exemption letter? If "Yes," stop here. **Yes** **No**
- c** If you were included as a subordinate in a timely filed group exemption request that was denied, are you filing this application within 27 months from the postmark date of the Internal Revenue Service final adverse ruling letter? If "Yes," stop here. **Yes** **No**
-
- 4** Were you created on or before October 9, 1969? If "Yes," stop here. Do not complete the remainder of this schedule. **Yes** **No**
-
- 5** If you answered "No" to lines 1 through 4, we cannot recognize you as tax exempt from your date of formation unless you qualify for an extension of time to apply for exemption. Do you wish to request an extension of time to apply to be recognized as exempt from the date you were formed? If "Yes," attach a statement explaining why you did not file this application within the 27-month period. Do not answer lines 6, 7, or 8. If "No," go to line 6a. **Yes** **No**
-
- 6a** If you answered "No" to line 5, you can only be exempt under section 501(c)(3) from the postmark date of this application. Therefore, do you want us to treat this application as a request for tax exemption from the postmark date? If "Yes," you are eligible for an advance ruling. Complete Part X, line 6a. If "No," you will be treated as a private foundation. **Yes** **No**
- Note.** Be sure your ruling eligibility agrees with your answer to Part X, line 6.
- b** Do you anticipate significant changes in your sources of support in the future? If "Yes," complete line 7 below. **Yes** **No**

Schedule E. Organizations Not Filing Form 1023 Within 27 Months of Formation *(Continued)*

7 Complete this item only if you answered "Yes" to line 6b. Include projected revenue for the first two full years following the current tax year.

Type of Revenue	Projected revenue for 2 years following current tax year		
	(a) From To	(b) From To	(c) Total
1 Gifts, grants, and contributions received (do not include unusual grants)			
2 Membership fees received			
3 Gross investment income			
4 Net unrelated business income			
5 Taxes levied for your benefit			
6 Value of services or facilities furnished by a governmental unit without charge (not including the value of services generally furnished to the public without charge)			
7 Any revenue not otherwise listed above or in lines 9-12 below (attach an itemized list)			
8 Total of lines 1 through 7			
9 Gross receipts from admissions, merchandise sold, or services performed, or furnishing of facilities in any activity that is related to your exempt purposes (attach itemized list)			
10 Total of lines 8 and 9			
11 Net gain or loss on sale of capital assets (attach an itemized list)			
12 Unusual grants			
13 Total revenue. Add lines 10 through 12			

8 According to your answers, you are only eligible for tax exemption under section 501(c)(3) from the postmark date of your application. However, you may be eligible for tax exemption under section 501(c)(4) from your date of formation to the postmark date of the Form 1023. Tax exemption under section 501(c)(4) allows exemption from federal income tax, but generally not deductibility of contributions under Code section 170. Check the box at right if you want us to treat this as a request for exemption under 501(c)(4) from your date of formation to the postmark date.

▶

Attach a completed Page 1 of Form 1024, Application for Recognition of Exemption Under Section 501(a), to this application.

Schedule F. Homes for the Elderly or Handicapped and Low-Income Housing**Section I General Information About Your Housing**

1 Describe the type of housing you provide.

2 Provide copies of any application forms you use for admission.

3 Explain how the public is made aware of your facility.

4a Provide a description of each facility.

b What is the total number of residents each facility can accommodate?

c What is your current number of residents in each facility?

d Describe each facility in terms of whether residents rent or purchase housing from you.

5 Attach a sample copy of your residency or homeownership contract or agreement.

6 Do you participate in any joint ventures? If "Yes," state your ownership percentage in each joint venture, list your investment in each joint venture, describe the tax status of other participants in each joint venture (including whether they are section 501(c)(3) organizations), describe the activities of each joint venture, describe how you exercise control over the activities of each joint venture, and describe how each joint venture furthers your exempt purposes. Also, submit copies of all joint venture agreements. **Yes** **No**

Note. Make sure your answer is consistent with the information provided in Part VIII, line 8.

7 Do you or will you contract with another organization to develop, build, market, or finance your housing? If "Yes," explain how that entity is selected, explain how the terms of any contract(s) are negotiated at arm's length, and explain how you determine you will pay no more than fair market value for services. **Yes** **No**

Note. Make sure your answer is consistent with the information provided in Part VIII, line 7a.

8 Do you or will you manage your activities or facilities through your own employees or volunteers? If "No," attach a statement describing the activities that will be managed by others, the names of the persons or organizations that manage or will manage your activities or facilities, and how these managers were or will be selected. Also, submit copies of any contracts, proposed contracts, or other agreements regarding the provision of management services for your activities or facilities. Explain how the terms of any contracts or other agreements were or will be negotiated, and explain how you determine you will pay no more than fair market value for services. **Yes** **No**

Note. Answer "Yes" if you do manage or intend to manage your programs through your own employees or by using volunteers. Answer "No" if you engage or intend to engage a separate organization or independent contractor. Make sure your answer is consistent with the information provided in Part VIII, line 7b.

9 Do you participate in any government housing programs? If "Yes," describe these programs. **Yes** **No**

10a Do you own the facility? If "No," describe any enforceable rights you possess to purchase the facility in the future; go to line 10c. If "Yes," answer line 10b. **Yes** **No**

b How did you acquire the facility? For example, did you develop it yourself, purchase a project, etc. Attach all contracts, transfer agreements, or other documents connected with the acquisition of the facility.

c Do you lease the facility or the land on which it is located? If "Yes," describe the parties to the lease(s) and provide copies of all leases. **Yes** **No**

Schedule F. Homes for the Elderly or Handicapped and Low-Income Housing (Continued)**Section II Homes for the Elderly or Handicapped**

- 1a** Do you provide housing for the elderly? If "Yes," describe who qualifies for your housing in terms of age, infirmity, or other criteria and explain how you select persons for your housing. **Yes** **No**
- b** Do you provide housing for the handicapped? If "Yes," describe who qualifies for your housing in terms of disability, income levels, or other criteria and explain how you select persons for your housing. **Yes** **No**
-
- 2a** Do you charge an entrance or founder's fee? If "Yes," describe what this charge covers, whether it is a one-time fee, how the fee is determined, whether it is payable in a lump sum or on an installment basis, whether it is refundable, and the circumstances, if any, under which it may be waived. **Yes** **No**
- b** Do you charge periodic fees or maintenance charges? If "Yes," describe what these charges cover and how they are determined. **Yes** **No**
- c** Is your housing affordable to a significant segment of the elderly or handicapped persons in the community? Identify your **community**. Also, if "Yes," explain how you determine your housing is affordable. **Yes** **No**
-
- 3a** Do you have an established policy concerning residents who become unable to pay their regular charges? If "Yes," describe your established policy. **Yes** **No**
- b** Do you have any arrangements with government welfare agencies or others to absorb all or part of the cost of maintaining residents who become unable to pay their regular charges? If "Yes," describe these arrangements. **Yes** **No**
-
- 4** Do you have arrangements for the healthcare needs of your residents? If "Yes," describe these arrangements. **Yes** **No**
-
- 5** Are your facilities designed to meet the physical, emotional, recreational, social, religious, and/or other similar needs of the elderly or handicapped? If "Yes," describe these design features. **Yes** **No**

Section III Low-Income Housing

- 1** Do you provide low-income housing? If "Yes," describe who qualifies for your housing in terms of income levels or other criteria, and describe how you select persons for your housing. **Yes** **No**
-
- 2** In addition to rent or mortgage payments, do residents pay periodic fees or maintenance charges? If "Yes," describe what these charges cover and how they are determined. **Yes** **No**
-
- 3a** Is your housing affordable to low income residents? If "Yes," describe how your housing is made affordable to low-income residents. **Yes** **No**
- Note.** Revenue Procedure 96-32, 1996-1 C.B. 717, provides guidelines for providing low-income housing that will be treated as charitable. (At least 75% of the units are occupied by low-income tenants or 40% are occupied by tenants earning not more than 120% of the very low-income levels for the area.)
- b** Do you impose any restrictions to make sure that your housing remains affordable to low-income residents? If "Yes," describe these restrictions. **Yes** **No**
-
- 4** Do you provide social services to residents? If "Yes," describe these services. **Yes** **No**

Schedule G. Successors to Other Organizations

1a Are you a **successor** to a **for-profit organization**? If "Yes," explain the relationship with the **predecessor** organization that resulted in your creation and complete line 1b. **Yes** **No**

b Explain why you took over the activities or assets of a for-profit organization or converted from for-profit to nonprofit status.

2a Are you a successor to an organization other than a for-profit organization? Answer "Yes" if you have taken or will take over the activities of another organization; or you have taken or will take over 25% or more of the fair market value of the net assets of another organization. If "Yes," explain the relationship with the other organization that resulted in your creation. **Yes** **No**

b Provide the tax status of the predecessor organization. **Yes** **No**

c Did you or did an organization to which you are a successor previously apply for tax exemption under section 501(c)(3) or any other section of the Code? If "Yes," explain how the application was resolved. **Yes** **No**

d Was your prior tax exemption or the tax exemption of an organization to which you are a successor revoked or suspended? If "Yes," explain. Include a description of the corrections you made to re-establish tax exemption. **Yes** **No**

e Explain why you took over the activities or assets of another organization.

3 Provide the name, last address, and EIN of the predecessor organization and describe its activities.
Name: _____ **EIN:** -
Address: _____

4 List the owners, partners, principal stockholders, officers, and governing board members of the predecessor organization. Attach a separate sheet if additional space is needed.

Name	Address	Share/Interest (If a for-profit)

5 Do or will any of the persons listed in line 4, maintain a working relationship with you? If "Yes," describe the relationship in detail and include copies of any agreements with any of these persons or with any for-profit organizations in which these persons own more than a 35% interest. **Yes** **No**

6a Were any assets transferred, whether by gift or sale, from the predecessor organization to you? If "Yes," provide a list of assets, indicate the value of each asset, explain how the value was determined, and attach an appraisal, if available. For each asset listed, also explain if the transfer was by gift, sale, or combination thereof. **Yes** **No**

b Were any restrictions placed on the use or sale of the assets? If "Yes," explain the restrictions. **Yes** **No**

c Provide a copy of the agreement(s) of sale or transfer.

7 Were any debts or liabilities transferred from the predecessor for-profit organization to you? If "Yes," provide a list of the debts or liabilities that were transferred to you, indicating the amount of each, how the amount was determined, and the name of the person to whom the debt or liability is owed. **Yes** **No**

8 Will you lease or rent any property or equipment previously owned or used by the predecessor for-profit organization, or from persons listed in line 4, or from for-profit organizations in which these persons own more than a 35% interest? If "Yes," submit a copy of the lease or rental agreement(s). Indicate how the lease or rental value of the property or equipment was determined. **Yes** **No**

9 Will you lease or rent property or equipment to persons listed in line 4, or to for-profit organizations in which these persons own more than a 35% interest? If "Yes," attach a list of the property or equipment, provide a copy of the lease or rental agreement(s), and indicate how the lease or rental value of the property or equipment was determined. **Yes** **No**

Schedule H. Organizations Providing Scholarships, Fellowships, Educational Loans, or Other Educational Grants to Individuals and Private Foundations Requesting Advance Approval of Individual Grant Procedures

Section I *Names of individual recipients are not required to be listed in Schedule H.*

Public charities and private foundations complete lines 1a through 7 of this section. See the instructions to Part X if you are not sure whether you are a public charity or a private foundation.

- 1a Describe the types of educational grants you provide to individuals, such as scholarships, fellowships, loans, etc.
- b Describe the purpose and amount of your scholarships, fellowships, and other educational grants and loans that you award.
- c If you award educational loans, explain the terms of the loans (interest rate, length, forgiveness, etc.).
- d Specify how your program is publicized.
- e Provide copies of any solicitation or announcement materials.
- f Provide a sample copy of the application used.

2 Do you maintain case histories showing recipients of your scholarships, fellowships, educational loans, or other educational grants, including names, addresses, purposes of awards, amount of each grant, manner of selection, and relationship (if any) to officers, trustees, or donors of funds to you? If "No," refer to the instructions. Yes No

3 Describe the specific criteria you use to determine who is eligible for your program. (For example, eligibility selection criteria could consist of graduating high school students from a particular high school who will attend college, writers of scholarly works about American history, etc.)

- 4a Describe the specific criteria you use to select recipients. (For example, specific selection criteria could consist of prior academic performance, financial need, etc.)
- b Describe how you determine the number of grants that will be made annually.
- c Describe how you determine the amount of each of your grants.
- d Describe any requirement or condition that you impose on recipients to obtain, maintain, or qualify for renewal of a grant. (For example, specific requirements or conditions could consist of attendance at a four-year college, maintaining a certain grade point average, teaching in public school after graduation from college, etc.)

5 Describe your procedures for supervising the scholarships, fellowships, educational loans, or other educational grants. Describe whether you obtain reports and grade transcripts from recipients, or you pay grants directly to a school under an arrangement whereby the school will apply the grant funds only for enrolled students who are in good standing. Also, describe your procedures for taking action if the terms of the award are violated.

6 Who is on the selection committee for the awards made under your program, including names of current committee members, criteria for committee membership, and the method of replacing committee members?

7 Are relatives of members of the selection committee, or of your officers, directors, or **substantial contributors** eligible for awards made under your program? If "Yes," what measures are taken to ensure unbiased selections? Yes No

Note. If you are a private foundation, you are not permitted to provide educational grants to **disqualified persons**. Disqualified persons include your substantial contributors and foundation managers and certain family members of disqualified persons.

Section II **Private foundations complete lines 1a through 4f of this section. Public charities do not complete this section.**

1a If we determine that you are a private foundation, do you want this application to be considered as a request for advance approval of grant making procedures? Yes No N/A

- b For which section(s) do you wish to be considered?
 - 4945(g)(1)—Scholarship or fellowship grant to an individual for study at an educational institution
 - 4945(g)(3)—Other grants, including loans, to an individual for travel, study, or other similar purposes, to enhance a particular skill of the grantee or to produce a specific product

2 Do you represent that you will (1) arrange to receive and review grantee reports annually and upon completion of the purpose for which the grant was awarded, (2) investigate diversions of funds from their intended purposes, and (3) take all reasonable and appropriate steps to recover diverted funds, ensure other grant funds held by a grantee are used for their intended purposes, and withhold further payments to grantees until you obtain grantees' assurances that future diversions will not occur and that grantees will take extraordinary precautions to prevent future diversions from occurring? Yes No

3 Do you represent that you will maintain all records relating to individual grants, including information obtained to evaluate grantees, identify whether a grantee is a disqualified person, establish the amount and purpose of each grant, and establish that you undertook the supervision and investigation of grants described in line 2? Yes No

Schedule H. Organizations Providing Scholarships, Fellowships, Educational Loans, or Other Educational Grants to Individuals and Private Foundations Requesting Advance Approval of Individual Grant Procedures
(Continued)

Section II Private foundations complete lines 1a through 4f of this section. Public charities do not complete this section. (Continued)

- 4a** Do you or will you award scholarships, fellowships, and educational loans to attend an educational institution based on the status of an individual being an *employee of a particular employer*? If "Yes," complete lines 4b through 4f. **Yes** **No**
- b** Will you comply with the seven conditions and either the percentage tests or facts and circumstances test for scholarships, fellowships, and educational loans to attend an educational institution as set forth in Revenue Procedures 76-47, 1976-2 C.B. 670, and 80-39, 1980-2 C.B. 772, which apply to inducement, selection committee, eligibility requirements, objective basis of selection, employment, course of study, and other objectives? (See lines 4c, 4d, and 4e, regarding the percentage tests.) **Yes** **No**
- c** Do you or will you provide scholarships, fellowships, or educational loans to attend an educational institution to employees of a particular employer? **Yes** **No** **N/A**
If "Yes," will you award grants to 10% or fewer of the eligible applicants who were actually considered by the selection committee in selecting recipients of grants in that year as provided by Revenue Procedures 76-47 and 80-39? **Yes** **No**
- d** Do you provide scholarships, fellowships, or educational loans to attend an educational institution to children of employees of a particular employer? **Yes** **No** **N/A**
If "Yes," will you award grants to 25% or fewer of the eligible applicants who were actually considered by the selection committee in selecting recipients of grants in that year as provided by Revenue Procedures 76-47 and 80-39? If "No," go to line 4e. **Yes** **No**
- e** If you provide scholarships, fellowships, or educational loans to attend an educational institution to children of employees of a particular employer, will you award grants to 10% or fewer of the number of employees' children who can be shown to be eligible for grants (whether or not they submitted an application) in that year, as provided by Revenue Procedures 76-47 and 80-39? **Yes** **No** **N/A**
If "Yes," describe how you will determine who can be shown to be eligible for grants without submitting an application, such as by obtaining written statements or other information about the expectations of employees' children to attend an educational institution. If "No," go to line 4f.
- Note.** Statistical or sampling techniques are not acceptable. See Revenue Procedure 85-51, 1985-2 C.B. 717, for additional information.
- f** If you provide scholarships, fellowships, or educational loans to attend an educational institution to *children of employees of a particular employer* without regard to either the 25% limitation described in line 4d, or the 10% limitation described in line 4e, will you award grants based on facts and circumstances that demonstrate that the grants will not be considered compensation for past, present, or future services or otherwise provide a significant benefit to the particular employer? If "Yes," describe the facts and circumstances that you believe will demonstrate that the grants are neither compensatory nor a significant benefit to the particular employer. In your explanation, describe why you cannot satisfy either the 25% test described in line 4d or the 10% test described in line 4e. **Yes** **No**

Form 1023 Checklist

(Revised December 2013)

Application for Recognition of Exemption under Section 501(c)(3) of the Internal Revenue Code

Note. Retain a copy of the completed Form 1023 in your permanent records. Refer to the General Instructions regarding Public Inspection of approved applications.

Check each box to finish your application (Form 1023). Send this completed Checklist with your filled-in application. If you have not answered all the items below, your application may be returned to you as incomplete.

- Assemble the application and materials in this order:
- Form 1023 Checklist
 - Form 2848, *Power of Attorney and Declaration of Representative* (if filing)
 - Form 8821, *Tax Information Authorization* (if filing)
 - Expedite request (if requesting)
 - Application (Form 1023 and Schedules A through H, as required)
 - Articles of organization
 - Amendments to articles of organization in chronological order
 - Bylaws or other rules of operation and amendments
 - Documentation of nondiscriminatory policy for schools, as required by Schedule B
 - Form 5768, *Election/Revocation of Election by an Eligible Section 501(c)(3) Organization To Make Expenditures To Influence Legislation* (if filing)
 - All other attachments, including explanations, financial data, and printed materials or publications. Label each page with name and EIN.
- User fee payment placed in envelope on top of checklist. DO NOT STAPLE or otherwise attach your check or money order to your application. Instead, just place it in the envelope.
- Employer Identification Number (EIN)
- Completed Parts I through XI of the application, including any requested information and any required Schedules A through H.
- You must provide specific details about your past, present, and planned activities.
 - Generalizations or failure to answer questions in the Form 1023 application will prevent us from recognizing you as tax exempt.
 - Describe your purposes and proposed activities in specific easily understood terms.
 - Financial information should correspond with proposed activities.
- Schedules. Submit only those schedules that apply to you and check either "Yes" or "No" below.
- | | | | |
|------------|----------------|------------|----------------|
| Schedule A | Yes ___ No ___ | Schedule E | Yes ___ No ___ |
| Schedule B | Yes ___ No ___ | Schedule F | Yes ___ No ___ |
| Schedule C | Yes ___ No ___ | Schedule G | Yes ___ No ___ |
| Schedule D | Yes ___ No ___ | Schedule H | Yes ___ No ___ |

- An exact copy of your complete articles of organization (creating document). Absence of the proper purpose and dissolution clauses is the number one reason for delays in the issuance of determination letters.
 - Location of Purpose Clause from Part III, line 1 (Page, Article and Paragraph Number) _____
 - Location of Dissolution Clause from Part III, line 2b or 2c (Page, Article and Paragraph Number) or by operation of state law _____
- Signature of an officer, director, trustee, or other official who is authorized to sign the application.
 - Signature at Part XI of Form 1023.
- Your name on the application must be the same as your legal name as it appears in your articles of organization.

Send completed Form 1023, user fee payment, and all other required information, to:

Internal Revenue Service
P.O. Box 192
Covington, KY 41012-0192

If you are using express mail or a delivery service, send Form 1023, user fee payment, and attachments to:

Internal Revenue Service
201 West Rivercenter Blvd.
Attn: Extracting Stop 312
Covington, KY 41011

Part IV: Narrative Description of Your Activities

Mission

The mission of The Green School is to cultivate respect and honor for self, one another, and the natural world as we work collaboratively to maximize the potential of the whole child. Students attending our school are taught academic subjects through the arts and real world application and learn practical skills through authentic experiences. Students graduate from our school empowered with the will, skill, capacity, and knowledge to bring about positive change for themselves, others, and their community.

We anticipate a student population made up of children whose parents seek an alternative form of education. Many of today's children do not fit in a traditional public school setting. Further, some have diverse needs that may or may not be met through special education programs. Twenty-first century children require a different type of schooling – one that honors the whole child and employs a diverse set of educational methods. We anticipate our school will attract and serve a wide array of students, some with identified special education needs and others who simply need or seek an alternative. We intend to enroll a diverse population of students, including students from disadvantaged families and the many families from diverse backgrounds. We strongly believe that all students deserve a choice that will best meet their needs. Our curriculum reflects a multicultural program, naturally woven into the arts and academics. We also seek students who feel disconnected from learning in traditional public school settings. Teaching to the whole child meets the needs of children who feel alienated from standardized curriculum.

Present and Planned Activities

Our Founders Group and Board of Trustees is currently working on submitting a charter application to the Indiana Charter School Board. This application is due February 24, 2014. Concurrently, we are working to find a location for our school. The realtor on our board is working on drafting an offer for a location on the south side of Bloomington, IN. In addition to diligently working on our charter application, our Founders Group is setting up a year-long program of Educational Outreach Events. These events will help the local community know who we are as an organization, what our philosophy of education is and how the community can become involved in our proposed school. Following is a list of our proposed events:

March – An Overview of The Green School: Who are we, what makes us unique?

April – A Deep Integration of the Arts I

May - Community Conversation about MONEY: Referendum Money, Real Dollars Spent on Charter Schools, Transparency of our Budget

June - Supporting Learning through Technology

July - Education for Sustainability

August - Outdoor Learning

September - Social Emotional Learning

October - Creating Community

November – A Deep Integration of the Arts II

December - Cultivating Leadership (Activism, Social Justice)

January 2015 – Movie Night

February 2015 – Valentine’s Day Fundraiser

The Indiana Charter School Board (ICSB) will invite our Founders Group to an interview in March of 2014 and we will attend a public meeting hosted by ICSB in April. Following both these events, ICSB will make a determination as to whether or not our school receives a charter. If we do receive our charter, our above list of community education events will continue. We will apply for a planning grant, which will allow us to recruit and train teachers and begin formally advertising for our school, letting the community know when Open Enrollment begins. Our Board and Founders will be in full swing with our building project, planning on a 2015 opening of the school.

We want our school to be a model for other schools in the local community, the region, and the state. The Green School uses cultures that employ rigorous, daily, critical assessments of teacher and student work. Our belief is that the building of a deeply collaborative educational culture grounded in critical friendship, and the cultivating of reflective and honest dialogue, are the catalysts necessary to improve teaching and transform leading and learning.

Part V: Compensation and Other Financial Arrangements with your Officers, Directors, Trustees, Employees, and Independent Contractors.

1a List the names, titles, and mailing addresses of all of your officers, directors, and trustees. For each person listed, state their total annual compensation, or proposed compensation, for all services to the organization, whether as an officer, employee, or other position. Use actual figures, if available. Enter “none” if no compensation is or will be paid. If additional space is needed, attach a separate sheet. Refer to the instructions for information on what to include as compensation.

Name	Title	Mailing Address	Compensation
Mary Goral	Education Director	2517 Country Clud. Rd. Nashville, IN 47448	\$66,000 (estimated)
Matthew T. Barr	Board President	425 E. Dodds Bloomington, IN 47401	\$0.00
Deborah Wilkin	Board Secretary	455 Wylie Farm Rd. Bloomington, IN.47401	\$0.00
Karen Connor	Board Treasurer	580 W. Fairway Ln. Bloomington, IN 47403	\$0.00
Mike Beam	Board Member	6400 E Collins Lane Bloomington, In 47408	\$0.00
Donald Griffin	Board Member	115 S. Bryan Ave. Bloomington, IN 47408	\$0.00
Brandi Smith	Board Member	1314 E. Fairwood Drive Bloomington, IN 47408	\$0.00
Michele Brentano	Board Member	608 W. 4 th St. Bloomington, IN 47404	\$0.00
Theresa Ochoa	Board Member	School of Education W.W. Wright Education Building Room 3268 201 N Rose Ave. Bloomington, IN 47405-1006	\$0.00

2a Are any of your officers, directors, or trustees related to each other through family or business relationships? If “Yes,” identify the individuals and explain the relationship.

Matthew T. Barr, Board President, is the nephew of Dr. Mary Goral, the Education Director.

5a Have you adopted a conflict of interest policy consistent with the sample conflict of interest policy in Appendix A to the instructions? If “Yes,” provide a copy of the policy and explain how the policy has been adopted, such as by resolution of your governing board. If “No,” answer lines 5b and 5c.

Yes. The conflict of interest policy was established by vote of the board in Article 10 of The Green School’s bylaws and is included below:

Article 10: Conflict of Interest and Compensation Approval Policies

Article 10.1: Purpose of Conflict of Interest Policy

The purpose of this conflict of interest policy is to protect this tax-exempt corporation's interest when it is contemplating entering into a transaction or arrangement that might benefit the private interest of an officer or director of the corporation or any "disqualified person" as defined in Section 4958(f)(1) of the Internal Revenue Code and as amplified by Section 53.4958-3 of the IRS Regulations and which might result in a possible "excess benefit transaction" as defined in Section 4958(c)(1)(A) of the Internal Revenue Code and as amplified by Section 53.4958 of the IRS Regulations. This policy is intended to supplement but not replace any applicable state and federal laws governing conflict of interest applicable to nonprofit and charitable organizations.

Article 10.2: Definitions

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

- 1) An ownership or investment interest in any entity with which the corporation has a transaction or arrangement,
- 2) A compensation arrangement with the corporation or with any entity or individual with which the corporation has a transaction or arrangement (compensation includes direct and indirect remuneration as well as gifts or favors that are not insubstantial), or
- 3) A potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which the corporation is negotiating a transaction or arrangement.

Article 10.3: Conflict of Interest Avoidance Procedures

In order to avoid conflicts of interest, the following procedures will be followed:

- 1) An interested person must disclose the existence of the financial interest and be given opportunity to disclose material facts to the board considering the transaction or arrangement.
- 2) After disclosure of the financial interest and all material facts, and after any discussion with the interested person, he/she shall leave the governing board while the determination of a conflict of interest is discussed and voted upon.
- 3) After exercising due diligence, the governing board shall determine whether the corporation can obtain with reasonable efforts a more advantageous transaction or arrangement from a person or entity that would not give rise to a conflict of interest.
- 4) If a more advantageous transaction or arrangement is not reasonably possible under circumstances not producing a conflict of interest, the governing board shall determine by a majority vote of the disinterested directors whether the transaction or arrangement is in the corporation's best interest, for its own benefit, and whether it is fair and reasonable. In so doing it shall make its decision as to whether to enter into the transaction or arrangement.
- 5) If the governing board has reasonable cause to believe a member has not disclosed actual

or possible conflicts of interest, it shall inform the member and afford the member an opportunity to explain the alleged failure to disclose. If, after hearing the member's response and after making further investigation as warranted, the board determines the member has failed to disclose an actual or possible conflict of interest, it shall take appropriate disciplinary and corrective action.

Article 10.4: Records of Board and Board Committee Proceedings

The minutes of meetings of the governing board shall contain:

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

Article 10.5. Compensation Approval Policies

The following compensation approval policies shall be followed:

- 1) A voting member of the board who receives compensation from the corporation for services may not vote on matters pertaining to that member's compensation.
- 2) The terms of compensation shall be approved by the board prior to the first payment.
- 3) The board shall obtain and rely upon appropriate data as to comparability prior to approving the terms of compensation. Appropriate data may include compensation levels paid by similarly situated organizations, both taxable and tax-exempt, for functionally comparable positions, and actual written offers from similar institutions competing for the services of the person who is the subject of the compensation arrangement
- 4) The terms of compensation shall be recorded in written minutes of the meeting of the board that approved the compensation.

Article 10.6. Annual Statements

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

- 1) Has received a copy of the conflicts of interest policy,
- 2) Has read and understands the policy,
- 3) Has agreed to comply with the policy, and
- 4) Understands the corporation is tax-exempt and in order to maintain its federal tax exemption it must engage primarily in activities which accomplish one or more of its tax-exempt purposes.

Article 10.7: Periodic Reviews

To ensure the corporation operates in a manner consistent with charitable purposes and does not engage in activities that could jeopardize its tax-exempt status, periodic reviews shall be

conducted. The periodic reviews shall, at a minimum, include the following subjects:

- 1) Whether compensation arrangements and benefits are reasonable, based on competent survey information, and the result of arm's-length bargaining.
- 2) Whether partnerships, joint ventures, and arrangements with management organizations conform to the corporation's written policies, are properly recorded, reflect reasonable investment or payments for goods and services, further charitable purposes, and do not result in inurement, impermissible private benefit, or in an excess benefit transaction.

7a. Do you or will you purchase any goods, services, or assets from any of your officers, directors, trustees, highest compensated employees or highest compensated independent contractors listed in lines 1a, 1b, or 1c? If "Yes" describe any such purchase that you made or intend to make, from whom you will make such purchases, how the terms are or will be negotiated at **arm's length**, and explain how you determine or will determine that you pay no more than **fair market value**. Attach copies of any written contracts or other agreements relating to such purchases.

Mary Goral, the school's proposed Educational Director, is an instructor for Kentahten Teacher Training. TGS intends to have Kentahten Teacher Training train their teachers in the Waldorf approach. Kentahten Teacher Training charges less than other Waldorf Teacher Trainings in the country, as they have much lower overhead (no building, only one part-time employee). Charges for training will likely be under fair market value. No contracts have been drawn up at this point. Any contract will be approved by the board. The board will negotiate the contract for the teacher training using a standardized pay-scale based on teaching experience and level of degree.

8a. Do you or will you have any leases, contracts, loans, or other agreements with your officers, directors, trustees, highest compensated employees, or highest compensated independent contractors listed in lines 1a, 1b, or 1c? If "yes" provide the information requested in lines 8b through 8f.

b. Describe any written or oral arrangements that you made or intend to make.

The Green School plans to use Kentahten Teacher Training to train their teachers in the Waldorf approach.

c. Identify with whom you have or will have such arrangements.

Dr. Mary Goral is an instructor for Kentahten Teacher Training and will teach certain courses.

d. Explain how the terms will be negotiated at arm's length.

TGS has followed its Conflict of Interest Avoidance Procedures, as codified in Article 10.3 of its bylaws. TGS will continue to follow these procedures.

The board of The Green School will perform due diligence to determine whether TGS could obtain a more advantageous training contract from another entity without a conflict, and to

determine the fair market value of this teacher training. The board will pay no more than fair market value for the training. Mary Goral will take no part in this deliberation and decision.

e. Explain how you determine you pay no more than fair market value or you are paid at least fair market value.

The board of The Green School is responsible for ensuring the financial health of the corporation and will do any research necessary to determine that the rate of pay is no more than fair market value.

9a. Do you or will you have any leases, contracts, loans, or other agreements with your officers, directors, trustees, highest compensated employees or highest compensated independent contractors listed in lines 1a, 1b, or 1c?

b. Describe any written or oral arrangements that you made or intend to make.

The Green School plans to use Kentahten Teacher Training to train their teachers in the Waldorf approach.

c. Identify with whom you have or will have such arrangements.

Mary Goral, the proposed Educational Director of TGS is a board member of Kentahten Teacher Training.

d. Explain how the terms are or will be negotiated at arm's length.

TGS has followed its Conflict of Interest Avoidance Procedures, as codified in Article 10.3 of its bylaws. TGS will continue to follow these procedures.

The board of The Green School will perform due diligence to determine whether TGS could obtain a more advantageous training contract from another entity without a conflict, and to determine the fair market value of this teacher training. The board will pay no more than fair market value for the training. Mary Goral will take no part in this deliberation and decision.

e. Explain how you determine or will determine you pay no more than fair market value or that you are paid at least fair market value.

The board of The Green School is responsible for ensuring the financial health of the corporation and will do any research necessary to determine that the rate of pay is no more than fair market value and is at least fair market value

Part VI

1a In carrying out your exempt purpose, do you provide goods, services, or funds to individuals? If "Yes," describe each program that provides goods, services, or funds to individuals.

The Green School will provide the service of education to students. Students attending our school are taught academic subjects through the arts and real world application and learn

practical skills through authentic experiences. Students graduate from our school empowered with the will, skill, capacity, and knowledge to bring about positive change for themselves, others, and their community.

Part VIII

4a Do you or will you undertake fundraising?

Mail and email solicitations: Once per year we will do an annual campaign and send out an appeal letter to parents, community members interested in our school, and all those on our mailing list.

Personal solicitations: Board members, school founders, administrators, staff, teachers, and parents, may have conversations with community members in which they invite donations.

Phone solicitations: Board members, school founders, administrators, staff, teachers, and parents, may have conversations with community members in which they invite donations.

Foundations and grant solicitations: TGS will seek grants for its educational programs and for operational support through written inquiries and proposals.

Government grant solicitations: TGS will seek grants for its educational programs and for operational support through written inquiries and proposals.

Accept donations on your website: We may in the future invite donations via our website, but we do not anticipate establishing a system for receiving donations directly from credit cards via the website.

Other: In the future we may hold fundraising events including but not limited to auctions, festivals and concerts.

5. Are you affiliated with a government unit?

TGS is applying for chartering authorization with the Indiana Charter School Board (ICSB), an independent state agency. If ICSB approves TGS's application for a charter, ICSB will grant TGS a charter to begin operating. The State of Indiana distributes money to counties, which will be granted to TGS from the counties on a per pupil basis. TGS also anticipates receiving education grants from the United States federal government.

Each school authorized by the ICSB is subject to a transparent and outcomes-oriented accountability system. A school's performance is assessed annually and summarized in a Performance Dashboard. In addition, the ICSB publishes an Annual Report analyzing the performance of all schools we authorize. The Performance Dashboards and Annual Report are posted on the ICSB website every January.

7a. Do or will persons other than your employees or volunteers develop your facilities? Describe each facility, the role of the developer, and any business or family relationship between the developer and your officers, directors, or trustees.

TGS will contract with an architect, a construction company, and a bank for our building loan. Each of the preceding businesses will submit a bid to our governing board. The board will vet each bid and choose the one that best meets the needs of our school and our school's budget.

The property we have identified is located at 2200 West Tapp Rd. Currently, it is used as the headquarters for Cassidy Electric Company. This property includes a restored 7,500 square foot limestone commercial building situated on 5 acres.

We project that the cost to complete the Green School Campus will be between approximately \$2.1 million dollars. The initial site cost will be \$875,000. This price includes the building located at 2200 West Tapp Rd., which sits on two acres plus 3 additional acres that we will use to build a playground, parking lot, and an additional building. With this in mind, the infrastructure and excavation are expected to cost no more than \$150,000. The conversion of the existing building from an office building to a school should cost no more than \$25,000.

We anticipate that a newly constructed steel frame building will cost no more than \$1,000,000. As we plan for this new structure, we project that it will have a footprint equal to 10,000 square feet.

There is no family relationship between the business and the school officers, directors and trustees.

7b. Do or will persons other than your employees or volunteers manage your activities or facilities? If yes, describe each activity and facility, the role of the manager, and any business or family relationships between the manager and your officers, directors, or trustees.

As part of our management team, We will partner with Charter School Management Corporation (CSMC) who will perform the following duties for us; Back Office (Financial) Support, Compliance and Reporting, Human Resources and Payroll, and School Software Support. Those duties include but are not limited to the following:

- Perform administrative responsibilities such as preparing reports for the state, federal government and local agencies
- Work with the Educational Director to see ADM count is administered properly
- Prepare purchase orders
- Prepare bank deposits
- Match purchase orders to vouchers
- Prepare vouchers
- Prepare information for payroll processing
- Keep account of expenditures and allocations
- Under the direction of the Treasurer of the Governing Board, draft fiscal and accountability reports and prepare for annual audits
- Assist the Educational Director and Assistant Director in developing school budgets
- Recommend appropriate business-related school policies and procedures

There are no family relationships with any member of CSMC and any or our trustees, officers, or directors.

Part IX

A. Statement of Revenues and Expenses

23 Any expense not otherwise classified, such as program services (attach itemized list)

	7/2013 to 6/2014	7/2012 to 6/2013	7/2014 to 6/2015	7/2015 to 6/2016
Instructional Supplies and Resources				
Textbooks				\$30,000
Other classroom supplies			\$3,000	\$5,000
Professional Services				\$42,450
Training Expenses				\$12,500
Total Instructional Supplies and Resources	\$0	\$0	\$3,000	\$89,950

Support Supplies and Resources				
Administrative Computers				\$18,000
Administrative Software			\$2,000	
Office supplies				\$3,500
Professional Expenses				\$71,239
Community Relations				\$6,700
Technology Supplies/Materials/Equipment				\$35,000
Promotional Materials		\$745		
Other (please describe)				\$1,200
Total Support Supplies and Resources	\$0	\$745	\$2,000	\$135,639

Other Expenses				
Internet Services	\$25	\$25		\$4,800
Indiana Charter School Board Administrative Fee				\$25,519
Indiana Incorporation Fees		\$30		
Form 1023 User Fee	\$850			
Total Other Expenses	\$875	\$55	\$0	\$30,319
Total Itemized Expenses	\$875	\$800	\$5,000	\$255,908

B. Balance Sheet (for your most recently completed tax year)

10 Other assets (attach an itemized list)

Other assets	
Website	\$25

Schedule B. Schools, Colleges, and Universities

Section I – Operational Information

1b Is the primary function of your school the presentation of formal instruction? If “Yes,” describe your school in terms of whether it is an elementary, secondary, college, technical, or other type of school. If “No,” do not complete the remainder of Schedule B.

Yes—the Green School will start out as an elementary school, serving grades K-5. Each year for the next three years, we will add a grade level. By year four, we will be fully enrolled and complete in our grade configuration, which will be K-8.

2b Are you a public school because you are operated wholly or predominantly from government funds or property? If “Yes,” explain how you are operated wholly or predominantly from government funds or property. Submit a copy of your funding agreement regarding government funding. Do not complete the remainder of Schedule B.

We will get our funding from the State of Indiana according to their formula for per pupil spending. This basic tuition grant is approximately \$5500 per student (1-8) and half that for kindergarten students. This amount is an approximation for Monroe and surrounding counties. Tax-exempt status is required for an application for a charter school to be approved, so the exact amount is not yet known.

During the first two years of operation, federal grants are available up to \$250,000 a year. We will also get federal and state grants for school lunch programs and special education. Please see budget for exact amounts.

**INDIANA SECRETARY OF STATE
BUSINESS SERVICES DIVISION
CORPORATIONS CERTIFIED COPIES**

INDIANA SECRETARY OF STATE
BUSINESS SERVICES DIVISION
302 West Washington Street, Room E018
Indianapolis, IN 46204

<http://www.sos.in.gov>

February 22, 2014

Company Requested: THE GREEN SCHOOL CORPORATION
Control Number: 2012073000168

Date	Transaction	# Pages
07/30/2012	Articles of Incorporation	2
01/15/2014	Articles of Amendment	3



**State of Indiana
Office of the Secretary of State**

**I hereby certify that this is a true and
complete copy of this 5 page
document filed in this office.**

**Dated: February 22, 2014
Certification Number: 2014022295724**

Connie Lawson

**Connie Lawson
Secretary of State**

**State of Indiana
Office of the Secretary of State**

CERTIFICATE OF INCORPORATION

of

GREEN MEADOWS CHARTER SCHOOL CORPORATION

I, Connie Lawson, Secretary of State of Indiana, hereby certify that Articles of Incorporation of the above Non-Profit Domestic Corporation has been presented to me at my office, accompanied by the fees prescribed by law and that the documentation presented conforms to law as prescribed by the provisions of the Indiana Nonprofit Corporation Act of 1991.

NOW, THEREFORE, with this document I certify that said transaction will become effective Monday, July 30, 2012.

In Witness Whereof, I have caused to be affixed my signature and the seal of the State of Indiana, at the City of Indianapolis, July 30, 2012



Connie Lawson

CONNIE LAWSON,
SECRETARY OF STATE

2012073000168 / 2012073000168

RECEIVED 07/30/2012 09:25 AM

APPROVED AND FILED
CONNIE LAWSON
INDIANA SECRETARY OF STATE
7/30/2012 9:23 AM

ARTICLES OF INCORPORATION

Formed pursuant to the provisions of the Indiana Nonprofit Corporation Act of 1991.

ARTICLE I - NAME AND PRINCIPAL OFFICE

GREEN MEADOWS CHARTER SCHOOL CORPORATION

2517 COUNTRY CLUB ROAD, NASHVILLE, IN 47448

ARTICLE II - REGISTERED OFFICE AND AGENT

MARY BARR-GORAL

2517 COUNTRY CLUB ROAD, NASHVILLE, IN 47448

ARTICLE III – INCORPORATORS

DAVID GRUPENHOFF

PO BOX 756, NASHVILLE, IN 47448

Signature: DAVID GRUPENHOFF

ARTICLE IV – GENERAL INFORMATION

Effective Date: 7/30/2012

Type of Corporation: Public Benefit Corporation

Does the corporation have members?: No

The purposes/nature of business

TO CREATE AND MAINTAIN A CHARTER SCHOOL TO OFFER EDUCATION ALTERNATIVES.

Distribution of assets on dissolution or final liquidation

GIVEN TO BLOOMINGTON PROJECT SCHOOL, A CHARTER SCHOOL.

The Indiana Secretary of State filing office certifies that this copy is on file in this office.

**State of Indiana
Office of the Secretary of State**

CERTIFICATE OF AMENDMENT

of

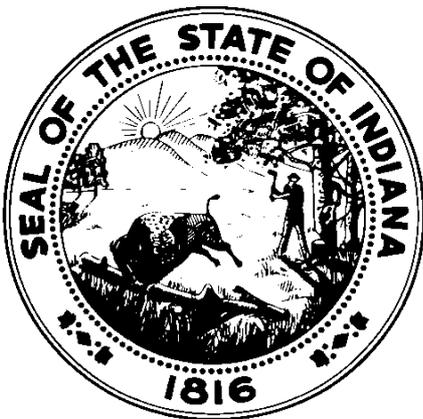
GREEN MEADOWS CHARTER SCHOOL CORPORATION

I, Connie Lawson, Secretary of State of Indiana, hereby certify that Articles of Amendment of the above Non-Profit Domestic Corporation has been presented to me at my office, accompanied by the fees prescribed by law and that the documentation presented conforms to law as prescribed by the provisions of the Indiana Nonprofit Corporation Act of 1991.

The name following said transaction will be:

THE GREEN SCHOOL CORPORATION

NOW, THEREFORE, with this document I certify that said transaction will become effective Wednesday, January 15, 2014.



In Witness Whereof, I have caused to be affixed my signature and the seal of the State of Indiana, at the City of Indianapolis, January 15, 2014

Connie Lawson

CONNIE LAWSON,
SECRETARY OF STATE

2012073000168 / 2014011500882

RECEIVED 01/15/2014 03:35 PM

APPROVED AND FILED
CONNIE LAWSON
INDIANA SECRETARY OF STATE
1/15/2014 3:38 PM

ARTICLES OF AMENDMENT

Formed pursuant to the provisions of the Indiana Nonprofit Corporation Act of 1991.

ENTITY NAME

GREEN MEADOWS CHARTER SCHOOL CORPORATION

The name following said transaction will be:
THE GREEN SCHOOL CORPORATION

Creation Date: 7/30/2012

2517 COUNTRY CLUB ROAD, NASHVILLE, IN 47448

REGISTERED OFFICE AND AGENT

MARY BARR-GORAL
2517 COUNTRY CLUB ROAD, NASHVILLE, IN 47448

OFFICERS AND BOARD OF DIRECTORS

Mary Barr-Goral
Director
2517 COUNTRY CLUB ROAD , Nashville, IN 47448

GENERAL INFORMATION

Adoption Date: 1/15/2014
Effective Date: 1/15/2014
Electronic Signature: MATTHEW BARR
Signator's Title: BOARD OF DIRECTORS CHAIR

MANNER AND ADOPTION OF VOTE

SECTION 1 Action by Board of Directors, Incorporators or by a person other than the members. The Board of Directors duly adopted a resolution proposing to amend the Article(s) of Incorporation: at a meeting held at which a quorum of such Board was present or by written consent executed and signed by all members of such Board. Approval of the members was not required and the amendment (s) were approved by a sufficient vote of the Board of Directors or Incorporators. The Amendment (s) was approved by a person other than members and that approval pursuant to Indiana code 23-17-27-1 was obtained.

Bylaws
The Green School Corporation

Article 1: Name

The name of this Corporation shall be The Green School Corporation, hereinafter referred to as the “Corporation.” The Corporation may do business under the name set forth in its Articles of Incorporation or under assumed business names. However, if the Corporation does business under a name other than that set forth in its Articles of Incorporation, then the Corporation shall file a certificate of assumed business name as required by law.

Article 2: Offices

Article 2.1: Principal Office and Registered Office and Agent

The Corporation’s initial principal and registered office in Indiana is located at 2517 Country Club Road, Nashville, Indiana, 47448, and the Corporation’s initial registered agent at that office is Mary Barr-Goral. The Corporation may change its registered agent and/or registered office at any time by resolution of the Board of Directors and upon filing the appropriate notice with the Indiana Secretary of State, and by amendment of these bylaws.

Article 2.2: Other Offices

The Corporation may also have offices at such other places, within or without its state of incorporation, where it is qualified to do business, as its business and activities may require, and as the Board of Directors may, from time to time, designate.

Article 3: Nonprofit Purposes

Article 3.1: IRC Section 501(c)(3) Purposes

This Corporation is organized exclusively for charitable, religious, scientific, literary, or educational purposes, as specified in Section 501(c)(3) of the Internal Revenue Code, including, for such purposes, the making of distributions to organizations that qualify as exempt organizations under Section 501(c)(3) of the Internal Revenue Code.

Article 3.2: Specific Objectives and Purposes

The specific objectives and purposes of this Corporation shall be to:

- 1) Create educational choice that provides rich experiential learning opportunities;
- 2) Cultivate in learners respect and reverence for self, one another, and the natural world;
- 3) Work collaboratively with students, teachers, and parents to maximize the potential of the

whole child;

- 4) Teach academic subjects through the arts and real world application and learn practical skills through authentic experiences; and
- 5) Create graduates who are empowered with the will, skill, capacity, and knowledge to bring about positive change to themselves, others, and their community.

Article 3.3: Prohibited Purposes and Acts

Prohibited purposes and acts of this Corporation shall include:

- 1) No part of the net earnings of the Corporation shall inure to the benefit of, or be distributable to, any of its directors, 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 above.
- 2) 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 distributing of statements) any political campaign on behalf of or in opposition to any candidate for public office.
- 3) Notwithstanding any provision of the Articles of Incorporation of the Corporation or any other provision of these Bylaws, the Corporation shall not carry on any other activities not permitted to be carried on (a) by a corporation exempt from Federal income tax under Section 501 (c) (3) of the Internal Revenue Code or (b) by a corporation, contributions to which are deductible under Sections 170(c) (2), 2055(a) of the Internal Revenue Code.
- 4) References in this section to a provision of the Internal Revenue Code shall be deemed to refer to the provision of the Internal Revenue Code of 1986, as amended, and also to the corresponding provision of any future federal tax law.

Article 4: Directors

Article 4.1: Number

The corporation shall have not less than 3 and not more than 15 directors and collectively they shall be known as the Board of Directors.

Article 4.2: Qualifications

All initial members of the Board of Directors were appointed by the “Founding Group,” (which is defined as Mary Goral, Bill Goral, Daniel Baron, Andrea Golden, Brandi Smith, and Michelle Henderson) after being interviewed by the Founding Group to ensure their professional and personal skills meshed with the skills needed for the school to be a success. For the first five (5) years of the operation of the Corporation, the Board will have no more than three and no less than one member of the Founders Group. By year three there will be no more than two or less than one parent serving on the Board.

Article 4.3: Election of Directors

Voting for the election of directors shall be by voice ballot. Each director shall cast one vote per candidate. The candidates receiving the highest number of votes shall be elected to serve on the board.

Article 4.4: Powers

Subject to the provisions of the laws of Indiana and any limitations in the Articles of Incorporation and these bylaws, the activities and affairs of this Corporation shall be conducted and all corporate powers shall be exercised by or under the direction of the Board of Directors.

Article 4.5: Duties

It shall be the duty of the directors to:

- 1) Perform all duties imposed on them by law, by the Articles of Incorporation, and/or by these bylaws;
- 2) Appoint and remove, employ and discharge, and, except as otherwise provided in these bylaws, prescribe duties and set compensation, if any, of all officers, agents, and employees of the corporation;
- 3) Supervise all officers, agents, and employees of the corporation;
- 4) Meet at such times and places as required by these bylaws;
- 5) Register their addresses with the secretary of the corporation, and notices of meetings mailed to them at such addresses shall be valid notices thereof.

Article 4.6: Term of Office

The initial board of directors will be identified by the Founders. Each board member will serve for a term of one to three years upon election of the current board of directors. The initial staggered terms are in order to establish continuity on the board and allow for staggered succession. For the initial board, a minimum of two board members will serve terms of one year, a minimum of two board members will serve terms of two years, and a minimum of two board members will serve terms of three years, for a total of a minimum of six people on the initial board.

After the initial board of directors is established, the people elected to the board will serve for three years. Board members can be renominated and serve for a maximum of three consecutive terms before stepping down. After stepping down for one year board members may rejoin the board.

Article 4.7: Resignation, Removal, and Vacancies

Resignation, removal and vacancies on the Board of Directors shall be implemented accordingly:

- 1) Resignation - Any director may resign at any time by giving written notice of such resignation to the Board of Directors, the Chair, or the Secretary of the Corporation. Such

resignation shall take effect at the time specified therein, or if no time is specified, at the time of its receipt. No director may resign if the corporation would then be left without a duly elected director or directors, except upon notice to the Office of the Attorney General or other appropriate agency of this state. The acceptance of a resignation shall not be necessary to make it effective.

- 2) Removal - A director may be removed from office with cause by a majority of the directors then in office. Cause shall include, but not be limited, to:
 - a) Violations of applicable law, including (but not limited to):
 - i) Violations of the Indiana Charter School Law; and
 - ii) Actions that would jeopardize the tax-exempt status of the Corporation or would subject it to intermediate sanctions under the Internal Revenue Code of 1986, as amended, or corresponding provisions of any subsequent federal tax laws (the "Code");
 - b) Breach of fiduciary duty, including (but not limited to) a violation of the applicable standard of care under the Articles, these Bylaws, or applicable law.
 - c) Breach of any governing document relating to the Corporation.
 - d) Inadequate attendance at meetings of the Board of Directors, defined as absence from three consecutive meetings or from at least fifty percent (50%) of such meetings within one (1) calendar year.
 - e) Conviction of a crime that would prohibit the individual from having contact with minor children.
- 3) Unless otherwise prohibited by the Articles of Incorporation, these bylaws, or provisions of law, vacancies on the board may be filled by the Board of Directors. The Board and the Education Director shall seek out and identify candidates for the Board to consider for Board membership. The Education Director and Board shall prioritize legal, business, accounting, and financial expertise in their selection of candidates for Board membership.

Once a candidate has been identified, both the Education Director and the Chair of the Board shall interview the candidate and review the school's vision, mission, core beliefs, Board meeting calendar, and the Board's Code of Ethics with the candidate. If the candidate agrees to serve as a Board member and both the Education Director and the Chair of the Board determine that the candidate shares the passion and commitment to the school's work, then the Chair of the Board and the Education Director shall present the candidate to the full Board for confirmation. If a majority of the members of the Board vote to confirm the candidate as a Board member, the candidate becomes a member of the Board immediately.

- 4) If the number of directors then in office is less than a quorum, a vacancy on the board may be filled by approval of a majority of the directors then in office or by a sole remaining director. A person elected to fill a vacancy on the board shall hold office for a term of 3 years or until his or her death, resignation, or removal from office

Article 4.8: Duties of Education Director

The Education Director shall be the chief executive officer of the corporation and shall, subject to the control of the Board of Directors, supervise and control the affairs of the corporation and the activities of the officers. He or she shall perform all duties incident to his or her office and such other duties as may be required by law, by the Articles of Incorporation, or by these bylaws, or which may be prescribed from time to time by the Board of Directors. The Education Director shall be present at all meetings of the Board of Directors but will not be a voting member of the board. Except as otherwise expressly provided by law, by the Articles of Incorporation, or by these bylaws, he or she shall, in the name of the corporation, execute such deeds, mortgages, bonds, contracts, checks, or other instruments which may from time to time be authorized by the Board of Directors. The Education Director shall receive compensation as determined by the Board of Directors.

Article 4.9: Compensation

Directors shall serve without compensation except that a reasonable fee may be paid to directors for attending regular and special meetings of the board, and shall be allowed reasonable reimbursement of expenses incurred in the performance of their duties. Any payments to directors shall be approved in advance in accordance with this Corporation's conflict of interest policy, as set forth in Article 10 of these bylaws. This section does not apply to the Education Director.

Article 4.10: Non-Liability of Directors

The directors shall not be personally liable for debts, liabilities, or other obligations of the corporation.

Article 4.11: Indemnification by Corporation of Directors and Officers

The directors and officers of the corporation shall be indemnified by the corporation to the fullest extent permissible under Indiana law.

Article 4.12: Insurance for Corporate Agents

Except as may be otherwise provided under provisions of law, the Board of Directors may adopt a resolution authorizing the purchase and maintenance of insurance on behalf of any agent of the corporation (including a director, officer, employee, or other agent of the corporation) against liabilities asserted against or incurred by the agent in such capacity or arising out of the agent's status as such, whether or not the corporation would have the power to indemnify the agent against such liability under the Articles of Incorporation, these bylaws, or provisions of law.

Article 4.13: Committees

There will be two initial committees of the Board: an Executive Committee and a Finance Committee. The committees will have membership determined by the Board of Directors.

Both committees will be composed of four people, with the President serving on each. The committees will meet at least quarterly and may meet more often as needed.

The Executive Committee will be composed of the President and three other members. The Executive Committee handles evaluation and hiring of the Education Director, student and family complaints, land and building purchases, significant personnel complaints and urgent issues that cannot wait for the next scheduled board meeting.

The Finance Committee will be composed of the President, the Treasurer, and two other board members. The Finance Committee will review all financial statements, tax returns, expenditures, contracts, and audits. The Finance Committee will deliver a monthly financial report to the full board.

Article 5: Officers

Each officer shall be elected by the Board of Directors and shall serve for one (1) year, or such other period as prescribed by the directors at the time of such election, or until he or she resigns or is removed or is otherwise disqualified to serve, or until the officer's successor is elected and qualified, whichever occurs first. An officer must be a Director of the Corporation, and the Education Director cannot be an officer.

Article 5.1: Officers named

The officers of the Corporation shall consist of:

- 1) President
- 2) Secretary
- 3) Treasurer
- 4) Other officers as the Board of Directors may otherwise elect

An officer may not simultaneously hold more than one (1) office. Any person may serve as an Officer of the Corporation.

Article 5.2: President

The President shall:

- 1) Preside at all meetings of the Board of Directors of the Corporation;
- 2) Be responsible for implementing policies established by the Board of Directors;
- 3) Serve on the Executive Committee and Finance Committee;
- 4) Perform such other duties as the Board of Directors may prescribe.

Article 5.3: Secretary

The Secretary shall:

- 1) Keep the minutes of meetings of the Board of Directors;

- 2) Provide all notices in accordance with the provisions of these bylaws or as required by law;
- 3) In general perform all duties incident to the office of Secretary and such other duties as from time to time may be assigned by the President or the Board of Directors

Article 5.4: Treasurer

The Treasurer shall:

- 1) Serve on the Finance Committee and give a financial report to the Board of Directors;
- 2) Present the proposed budget of the Corporation to the Board of Directors for a vote of approval at every meeting;
- 3) Oversee financial operations;
- 4) Keep and maintain correct accounts of the corporation's transactions, including accounts of its assets, liabilities, receipts, disbursements, gains, and losses;
- 5) Exhibit at all reasonable times the books of account and financial records to any director of the corporation, or to his or her agent or attorney, on request therefore; and
- 6) In general, perform all duties incident to the office of treasurer and such other duties as may be required by law, by the Articles of Incorporation of the corporation, or by these bylaws, or which may be assigned to him or her from time to time by the Board of Directors.

Article 5.5: Other Officers

Other officers of the Corporation shall perform such duties as the Board of Directors may prescribe.

Article 5.6: Removal and Resignation

An officer may be removed by the Board of Directors, with or without cause, at any time. Any officer may resign at any time by giving written notice to the Board of Directors. Any such resignation shall take effect at the date of receipt of such notice or at any later date specified therein, and, unless otherwise specified therein, the acceptance of such resignation shall not be necessary to make it effective.

Article 5.7: Vacancies

Any vacancy caused by the death, resignation, removal, disqualification, or otherwise, of any officer shall be filled by the Board of Directors. In the event of a vacancy in any office other than that of Education Director, such vacancy may be filled temporarily by appointment by the Education Director until such time as the board shall fill the vacancy.

Article 6: Meetings

Article 6.1: Place of Meetings

Meetings shall be held at the Monroe County Public Library, located at 303 E Kirkwood Ave,

Bloomington, IN 47408, until such time as the Corporation has its own physical location, at which time meetings shall be held at that location, unless otherwise provided by the board or at such other place as may be designated from time to time by the Board of Directors.

Article 6.2: Regular Meetings

The Board of Directors shall always meet at least ten (10) times per year.

Meetings may be held using telephonic or internet-based technology. The Board of Directors may provide the time and place, within the State of Indiana, for the holding of additional regular meetings of the Board so long as adequate notice is provided.

Article 6.3: Annual Meeting

The annual meeting shall be for the purpose of organization, election of Directors and officers and consideration of any other business that may properly be brought before the meeting and shall be held within six (6) months after the close of the fiscal year of the Corporation as designated by the Board of Directors. If the annual meeting is not held as above provided, the election of officers may be held at any subsequent meeting of the Board of Directors.

Article 6.4: Special Meetings

Special meetings of the Board of Directors may be called by the chairperson of the board, the Education Director, or by any three directors. Such meetings shall be held at the Corporation's registered office or, if different, at the place designated by the person or persons calling the special meeting.

Article 6.5: Notice of Meetings

Unless otherwise provided by the Articles of Incorporation, these bylaws, or provisions of law, the following provisions shall govern the giving of notice for meetings of the Board of Directors:

- 1) Regular Meetings - No notice need be given of any regular meeting of the Board of Directors.
- 2) Special Meetings - At least two days prior notice shall be given by the secretary of the corporation to each director of each special meeting of the board. Such notice may be oral or written, may be given personally, by first class mail, by telephone or by facsimile machine or electronic mail, and shall state the place, date, and time of the meeting and the matters proposed to be acted upon at the meeting.

Article 6.6: Quorum for Meetings

A quorum shall consist of 50% of the total number of members of the Board of Directors. Except as otherwise provided under the Articles of Incorporation, these bylaws, or provisions of law, no business shall be considered by the board at any meeting at which the required quorum is not present, and the only motion which the chair shall entertain at such meeting is a motion to adjourn.

Article 6.7: Majority Action as Board Action

Every act or decision done or made by a majority of the directors present at a meeting duly held at which a quorum is present is the act of the Board of Directors.

Article 6.8: Conduct of Meetings

Meetings of the Board of Directors shall be presided over by the chairperson of the board, or, if no such person has been so designated, or in his or her absence, the Education Director of the corporation. Meetings shall be governed by Roberts Rules of Order, insofar as such rules are not inconsistent with or in conflict with the Articles of Incorporation, these bylaws or with provisions of law.

Article 7: Execution of Instruments, Deposits, and Funds

Article 7.1: Execution of Instruments

The Board of Directors, except as otherwise provided in these bylaws, may by resolution authorize any officer or agent of the corporation to enter into any contract or execute and deliver any instrument in the name of and on behalf of the corporation, and such authority may be general or confined to specific instances. Unless so authorized, no officer, agent, or employee shall have any power or authority to bind the corporation by any contract or engagement or to pledge its credit or to render it liable monetarily for any purpose or in any amount.

Article 7.2: Checks and Notes

Except as otherwise specifically determined by resolution of the Board of Directors, or as otherwise required by law, checks, drafts, promissory notes, orders for the payment of money, and other evidence of indebtedness of the corporation shall be signed by the Treasurer.

Article 7.3: Deposits

Funds of the Corporation shall be deposited to the credit of the corporation in such banks, trust companies, or other depositories the Education Director, with notice to the Board, may select.

Article 7.4: Gifts

The Education Director, with notice to the Board of Directors, may accept on behalf of the Corporation any contribution, gift, bequest, or devise for the nonprofit purposes of this Corporation.

Article 7.5: Fiscal Year

Unless otherwise fixed by the Board of Directors, the fiscal year of the Corporation shall end on the thirtieth (30th) day of June each year.

Article 8: Corporate Records and Reports

Article 8.1: Maintenance of Corporate Records

The corporation shall keep at its principal office, or prior to the establishment of a principal office in the possession of the Education Director or another person that the board shall designate:

- 1) Minutes of all meetings, indicating their time and place, whether regular or special, the names of those present, and the proceedings thereof;
- 2) Correct books and records of account, including accounts of its transactions and accounts of its assets, liabilities, receipts, disbursements, gains, and losses; and
- 3) A copy of the corporation's Articles of Incorporation and bylaws as amended to date.

Article 8.2: Directors' Inspection Rights

Directors may, at any reasonable time, inspect and copy all books, records, and documents of every kind and inspect the physical properties of the corporation.

Article 8.3: Periodic Report

The board shall cause any annual or periodic report required under law to be prepared and delivered to an office of this state or to the members, if any, of this Corporation, to be so prepared and delivered within the time limits set by law.

Article 9: Dissolution of the Corporation

Pursuant to IC § 20-24-3-3, upon dissolution of the Corporation: (1) the remaining assets of the charter school shall be distributed first to satisfy outstanding payroll obligations for employees of the charter school, then to creditors of the charter school; and (2) remaining funds received from the Indiana Department of Education shall be returned to the department not more than thirty (30) days after dissolution. If the assets of the charter school are insufficient to pay all parties to whom the charter school owes compensation under subdivision (1), the priority of the distribution of assets may be determined by a court. Any of the Corporation's assets remaining after payment, or provision for payment, of all debts and liabilities of this Corporation as stated above, shall be distributed for one or more exempt purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code for in accordance with all applicable provisions of the laws of Indiana.

Article 10: Conflict of Interest and Compensation Approval Policies

Article 10.1: Purpose of Conflict of Interest Policy

The purpose of this conflict of interest policy is to protect this tax-exempt corporation's interest

when it is contemplating entering into a transaction or arrangement that might benefit the private interest of an officer or director of the corporation or any "disqualified person" as defined in Section 4958(f)(1) of the Internal Revenue Code and as amplified by Section 53.4958-3 of the IRS Regulations and which might result in a possible "excess benefit transaction" as defined in Section 4958(c)(1)(A) of the Internal Revenue Code and as amplified by Section 53.4958 of the IRS Regulations. This policy is intended to supplement but not replace any applicable state and federal laws governing conflict of interest applicable to nonprofit and charitable organizations.

Article 10.2: Definitions

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

- 1) An ownership or investment interest in any entity with which the corporation has a transaction or arrangement,
- 2) A compensation arrangement with the corporation or with any entity or individual with which the corporation has a transaction or arrangement (compensation includes direct and indirect remuneration as well as gifts or favors that are not insubstantial), or
- 3) A potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which the corporation is negotiating a transaction or arrangement.

Article 10.3: Conflict of Interest Avoidance Procedures

In order to avoid conflicts of interest, the following procedures will be followed:

- 1) An interested person must disclose the existence of the financial interest and be given opportunity to disclose material facts to the board considering the transaction or arrangement.
- 2) After disclosure of the financial interest and all material facts, and after any discussion with the interested person, he/she shall leave the governing board while the determination of a conflict of interest is discussed and voted upon.
- 3) After exercising due diligence, the governing board shall determine whether the corporation can obtain with reasonable efforts a more advantageous transaction or arrangement from a person or entity that would not give rise to a conflict of interest.
- 4) If a more advantageous transaction or arrangement is not reasonably possible under circumstances not producing a conflict of interest, the governing board shall determine by a majority vote of the disinterested directors whether the transaction or arrangement is in the corporation's best interest, for its own benefit, and whether it is fair and reasonable. In so doing it shall make its decision as to whether to enter into the transaction or arrangement.
- 5) If the governing board has reasonable cause to believe a member has not disclosed actual or possible conflicts of interest, it shall inform the member and afford the member an opportunity to explain the alleged failure to disclose. If, after hearing the member's response and after making further investigation as warranted, the board determines the member has failed to disclose an actual or possible conflict of interest, it shall take appropriate disciplinary and corrective action.

Article 10.4: Records of Board and Board Committee Proceedings

The minutes of meetings of the governing board shall contain:

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

Article 10.5. Compensation Approval Policies

The following compensation approval policies shall be followed:

- 1) A voting member of the board who receives compensation from the corporation for services may not vote on matters pertaining to that member's compensation.
- 2) The terms of compensation shall be approved by the board prior to the first payment.
- 3) The board shall obtain and rely upon appropriate data as to comparability prior to approving the terms of compensation. Appropriate data may include compensation levels paid by similarly situated organizations, both taxable and tax-exempt, for functionally comparable positions, and actual written offers from similar institutions competing for the services of the person who is the subject of the compensation arrangement
- 4) The terms of compensation shall be recorded in written minutes of the meeting of the board that approved the compensation.

Article 10.6. Annual Statements

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

- 1) Has received a copy of the conflicts of interest policy,
- 2) Has read and understands the policy,
- 3) Has agreed to comply with the policy, and
- 4) Understands the corporation is tax-exempt and in order to maintain its federal tax exemption it must engage primarily in activities which accomplish one or more of its tax-exempt purposes.

Article 10.7: Periodic Reviews

To ensure the corporation operates in a manner consistent with charitable purposes and does not engage in activities that could jeopardize its tax-exempt status, periodic reviews shall be conducted. The periodic reviews shall, at a minimum, include the following subjects:

- 1) Whether compensation arrangements and benefits are reasonable, based on competent survey information, and the result of arm's-length bargaining.
- 2) Whether partnerships, joint ventures, and arrangements with management organizations conform to the corporation's written policies, are properly recorded, reflect reasonable investment or payments for goods and services, further charitable purposes, and do not result in inurement, impermissible private benefit, or in an excess benefit transaction.

Article 11: Amendment of Bylaws

Article 11.1: Amendment

The bylaws of this Corporation, except otherwise specified under provisions of law, may be altered, amended, or repealed and new bylaws adopted by approval of the Board of Directors.

Article 12: Construction and Terms

If there is any conflict between the provisions of these bylaws and the Articles of Incorporation of this Corporation, the provisions of the Articles of Incorporation shall govern. Should any of these bylaws' provisions be held unenforceable or invalid for any reason, the remaining provisions of these bylaws shall be unaffected by such holding. All references in these bylaws to the Articles of Incorporation shall be to the Articles of Incorporation filed with an office of this state and used to establish the legal existence of this Corporation.

All references in these bylaws to a section or sections of the Internal Revenue Code shall be to such sections of the Internal Revenue Code of 1986 as amended from time to time, or to corresponding provisions of any future federal tax code.

Article 13: Nondiscrimination

Article 13.1 Nondiscrimination Policy

The Green School admits students of any race, color, national and ethnic origin to all the rights, privileges, programs, and activities generally accorded or made available to students at the school. It does not discriminate on the basis of race, color, national and ethnic origin in administration of its educational policies, admissions policies, scholarship and loan programs, and athletic and other school-administered programs.

INDIANA CHARTER SCHOOL BOARD: CHARTER SCHOOL APPLICANT
Statement of Assurances

The charter school agrees to comply with all of the following provisions: *(Read and check)*

- 1. A resolution or motion has been adopted by the charter school applicant's governing body that authorizes the submission of this application, including all understanding and assurances contained herein, directing and authorizing the applicant's designated representative to act in connection with the application and to provide such additional information as required.
- 2. Recipients operate (or will operate if not yet open) a charter school in compliance with all federal and state laws, including Indiana Charter Schools Law as described in all relevant sections of IC § 20-24.
- 3. Recipients will, for the life of the charter, participate in all data reporting and evaluation activities as required by the Indiana Charter School Board (ICSB) and the Indiana Department of Education. See in particular IC § 20-20-8-3 and relevant sections of IC § 20-24.
- 4. Recipients will comply with all relevant federal laws including, but not limited to, the *Age Discrimination in Employment Act* of 1975, Title VI of the *Civil Rights Act* of 1964, Title IX of the *Education Amendments* of 1972, section 504 of the *Rehabilitation Act* of 1973, Part B of the *Individuals with Disabilities Education Act*, and section 427 of the *General Education Provision Act*.
- 5. Recipients will comply with all provisions of the Non regulatory Guidance—Public Charter Schools Program of the U.S. Department of Education, which includes the use of a lottery for enrollment if the charter school is oversubscribed, as well as with applicable Indiana law. See also relevant sections of IC § 20-24.
- 6. Recipients shall ensure that a student's records, and, if applicable, a student's individualized education program as defined at 20 U.S.C. § 1401(14) of the *Individuals with Disabilities Education Act*, will follow the student, in accordance with applicable federal and state law.
- 7. Recipients will comply with all provisions of the *No Child Left Behind Act*, including but not limited to, provisions on school prayer, the Boy Scouts of America Equal Access Act, the Armed Forces Recruiter Access to Students and Student Recruiting Information, the Unsafe School Choice Option, the Family Educational Rights and Privacy Act (FERPA) and assessments.
- 8. Recipients will operate with the organizer serving in the capacity of fiscal agent for the charter school and in compliance with generally accepted accounting principles.
- 9. Recipients will at all times maintain all necessary and appropriate insurance coverage.
- 10. Recipients will indemnify and hold harmless the ICSB, the Indiana Department of Education, the State of Indiana, all school corporations providing funds to the charter school (if applicable), and their officers, directors, agents and employees, and any successors and assigns from any and all liability, cause of action, or other injury or damage in any way relating to the charter school or its operation.

11. Recipients understand that the ICSB may revoke the charter if the ICSB deems that the recipient is not fulfilling the academic goals and/or fiscal management responsibilities outlined in the charter.

Signature from Authorized Representative of the Charter School Applicant

I, the undersigned, am an authorized representative of the charter school applicant and do hereby certify that the information submitted in this application is accurate and true to the best of my knowledge and belief. In addition, I do hereby certify to the assurances contained above.

PRINT NAME & TITLE

Mary Barr Goral, Ph.D.
Education Director

DATE

2/22/14

SIGN NAME

Mary Barr Goral

CHARTER SCHOOL BOARD MEMBER INFORMATION

(To be completed individually by each proposed board member for the charter holder)

Serving on a public charter school board is a position of public trust and fiduciary responsibility. As a board member of a public school, you are responsible for ensuring the quality of the school program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, the Indiana Charter School Board requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the founding group behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

1. Name of charter school on whose Board of Directors you intend to serve: The Green School

2. Your full name: Matthew Thomas Barr

3. Brief educational and employment history. (No narrative response is required if resume is attached.)

Resume is attached.

4. Describe any of your previous experiences that are relevant to serving on the charter school's board (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.

My previous board experience was as a director of the Indiana University Student Athletic Board. This experience taught me a great deal about the organizational and personal tools need to work as an effective board. In addition, as a practicing lawyer I have a keen understanding of the legal, moral, and ethical responsibilities that a position of this nature requires.

5. Do you understand the obligations of a charter school's Board of Directors to comply with Indiana's Public Access laws, including the Open Door Law for Board meetings?

Yes Don't Know/ Unsure

Disclosures

1. Indicate whether you or your spouse knows the other prospective board members for the proposed school. If so, please indicate the precise nature of your relationship.

I / we do not know any such trustees. Yes *Mary Carol is my aunt.*

2. Indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the charter school (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the school.

I / we do not know any such persons. Yes

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

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

4. If the school intends to contract with an Education Service Provider or management organization, indicate whether you or your spouse knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship.

Not applicable because the school does not intend to contract with an education service provider or school management organization.

I / we do not know any such persons. Yes

5. If the school contracts with an education service provider, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.

N/A. I / we have no such interest. Yes

6. If the school plans to contract with an Education Service Provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.

N/A. I / we or my family do not anticipate conducting any such business. Yes

7. Indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.

Does not apply to me, my spouse or family. Yes

8. Indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board.

None. Yes

Certification

I, Matthew Barr, certify to the best of my knowledge and ability that the information I am providing to

the Indiana Charter School Board as a prospective board member for Charter School is true and correct in every respect.



Signature

2/10/14

Date

CHARTER SCHOOL BOARD MEMBER INFORMATION

(To be completed individually by each proposed board member for the charter holder)

Serving on a public charter school board is a position of public trust and fiduciary responsibility. As a board member of a public school, you are responsible for ensuring the quality of the school program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, the Indiana Charter School Board requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the founding group behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

1. Name of charter school on whose Board of Directors you intend to serve:

The Green School

2. Your full name: Michael B Beam

3. Brief educational and employment history. (No narrative response is required if resume is attached.)

Current position: Indiana University, Bloomington (2002 – current)

- Sr. Assistant Vice Provost for Undergraduate Education;
- Director Intensive Freshman Seminars;
- Director Advance College Project; and
- Director Indiana University High School

Previous position: Brown County High School (1994-2002)

- Assistant Principal (2000-2002)
- Art Teacher (1994-2000)

Resume is attached.

4. Describe any of your previous experiences that are relevant to serving on the charter school's board (including other board experience, or any experience

overseeing start-up or entrepreneurial ventures). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.

I have a background in K-12 education as a teacher and administrator, and I currently direct an online high school. I am also currently the Vice President of the board for Stepping Stones (a Bloomington based non-profit that supports students experiencing youth homelessness).

5. Do you understand the obligations of a charter school's Board of Directors to comply with Indiana's Public Access laws, including the Open Door Law for Board meetings?

X Yes Don't Know/ Unsure

Disclosures

1. Indicate whether you or your spouse knows the other prospective board members for the proposed school. If so, please indicate the precise nature of your relationship.

I / we do not know any such trustees. **Yes X** I know Theresa Ochoa, with whom I work at Indiana University

2. Indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the charter school (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the school.

I / we do not know any such persons. **Yes X** I know Andrea Golden and Brandi Smith, both family friends.

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

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

4. If the school intends to contract with an Education Service Provider or management organization, indicate whether you or your spouse knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship.

Not applicable because the school does not intend to contract with an education service provider or school management organization.

X I / we do not know any such persons. Yes

5. If the school contracts with an education service provider, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.

x N/A. I / we have no such interest. Yes

6. If the school plans to contract with an Education Service Provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.

x N/A. I / we or my family do not anticipate conducting any such business.
 Yes

7. Indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.

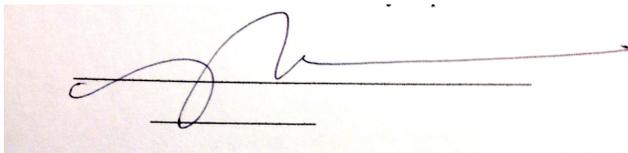
x Does not apply to me, my spouse or family. Yes

8. Indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board.

x None. Yes

Certification

I, Michael B Beam, certify to the best of my knowledge and ability that the information I am providing to the Indiana Charter School Board as a prospective board member for The Green School Charter School is true and correct in every respect.



Signature

2/5/2014

Date

CHARTER SCHOOL BOARD MEMBER INFORMATION

(To be completed individually by each proposed board member for the charter holder)

Serving on a public charter school board is a position of public trust and fiduciary responsibility. As a board member of a public school, you are responsible for ensuring the quality of the school program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, the Indiana Charter School Board requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the founding group behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

1. Name of charter school on whose Board of Directors you intend to serve:

The Green School

2. Your full name: Michele F. Brentano

3. Brief educational and employment history. (No narrative response is required if resume is attached.)

Resume is attached.

4. Describe any of your previous experiences that are relevant to serving on the charter school's board (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.

I served on the Buskirk-Chumley Theater Board for two years. I have more than 20 years of experience in the field of progressive education that promotes social justice, student-centered curriculum, restorative practices, and community building.

5. Do you understand the obligations of a charter school's Board of Directors to comply with Indiana's Public Access laws, including the Open Door Law for Board meetings?

Yes Don't Know/ Unsure

Disclosures

1. Indicate whether you or your spouse knows the other prospective board members for the proposed school. If so, please indicate the precise nature of your relationship.

I / we do not know any such trustees. Yes

2. Indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the charter school (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the school.

I / we do not know any such persons. Yes

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

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

4. If the school intends to contract with an Education Service Provider or management organization, indicate whether you or your spouse knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship.

Not applicable because the school does not intend to contract with an education service provider or school management organization.

I / we do not know any such persons. Yes

5. If the school contracts with an education service provider, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.

N/A. I / we have no such interest. Yes

6. If the school plans to contract with an Education Service Provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are

conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.

N/A. / we or my family do not anticipate conducting any such business. Yes

7. Indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.

Does not apply to me, my spouse or family. Yes

8. Indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board.

None. Yes

Certification

I, Michele Brentano, certify to the best of my knowledge and ability that the information I am providing to

the Indiana Charter School Board as a prospective board member for Charter School is true and correct in every respect.

Michele Brentano

Signature

2/4/2014

Date

CHARTER SCHOOL BOARD MEMBER INFORMATION

(To be completed individually by each proposed board member for the charter holder)

Serving on a public charter school board is a position of public trust and fiduciary responsibility. As a board member of a public school, you are responsible for ensuring the quality of the school program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, the Indiana Charter School Board requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the founding group behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

1. Name of charter school on whose Board of Directors you intend to serve:
The Green School

2. Your full name:
Karen Conner

3. Brief educational and employment history. (No narrative response is required if resume is attached.)

Resume is attached.

4. Describe any of your previous experiences that are relevant to serving on the charter school's board (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.

Board Member of Options For Better Living (treasurer), Finance Committee Member Bloomington Hospital; Board of Deacons Member, Evangelical Community Church, Treasure Team Member, Exodus Church;

As a Certified Public Accountant, I have assisted numerous Not-for-Profit's in start-up procedures as well as Financial Accounting assistance, audits and Internal Revenue Service compliance issues.

Disclosures

1. Indicate whether you or your spouse knows the other prospective board members for the proposed school. If so, please indicate the precise nature of your relationship. *Not prior to Board*

/ we do not know any such trustees. Yes

2. Indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the charter school (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the school.

/ we do not know any such persons. Yes

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

/ we do not anticipate conducting any such business. Yes

4. If the school intends to contract with an Education Service Provider or management organization, indicate whether you or your spouse knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship.

Not applicable because the school does not intend to contract with an education service provider or school management organization.

/ we do not know any such persons. Yes

5. If the school contracts with an education service provider, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.

N/A. / we have no such interest. Yes

6. If the school plans to contract with an Education Service Provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.

N/A. / we or my family do not anticipate conducting any such business. Yes

7. Indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.

Does not apply to me, my spouse or family. Yes

8. Indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board.

None. Yes

Certification

I, Karen Conner, certify to the best of my knowledge and ability that the information I am providing to

the Indiana Charter School Board as a prospective board member for Charter School is true and correct in every respect.

Karen Conner

Signature

2/20/2014

Date

CHARTER SCHOOL BOARD MEMBER INFORMATION

(To be completed individually by each proposed board member for the charter holder)

Serving on a public charter school board is a position of public trust and fiduciary responsibility. As a board member of a public school, you are responsible for ensuring the quality of the school program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, the Indiana Charter School Board requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the founding group behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

1. Name of charter school on whose Board of Directors you intend to serve:

The Green School

2. Your full name:

Donald Carlos Griffin, Jr.

3. Brief educational and employment history. (No narrative response is required if resume is attached.)

Resume is attached.

4. Describe any of your previous experiences that are relevant to serving on the charter school's board (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member. *Over 20 years of Board or trustee experience as well as 12 year of Business Ownership.*

5. Do you understand the obligations of a charter school's Board of Directors to comply with Indiana's Public Access laws, including the Open Door Law for Board meetings?

Yes Don't Know/ Unsure

Disclosures

1. Indicate whether you or your spouse knows the other prospective board members for the proposed school. If so, please indicate the precise nature of your relationship.

I / we do not know any such trustees. Yes

2. Indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the charter school (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the school.

I / we do not know any such persons. Yes

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

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

4. If the school intends to contract with an Education Service Provider or management organization, indicate whether you or your spouse knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship.

Not applicable because the school does not intend to contract with an education service provider or school management organization.

I / we do not know any such persons. Yes

5. If the school contracts with an education service provider, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.

N/A. I / we have no such interest. Yes

6. If the school plans to contract with an Education Service Provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.

N/A. I / we or my family do not anticipate conducting any such business. Yes

7. Indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.

Does not apply to me, my spouse or family. Yes

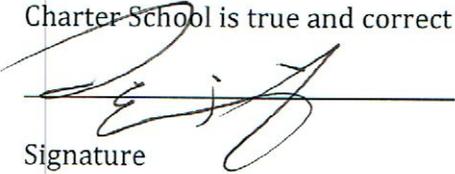
8. Indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board.

None. Yes

Certification

I, Donald Carlos Griffin, Jr, certify to the best of my knowledge and ability that the information I am providing to

the Indiana Charter School Board as a prospective board member for Charter School is true and correct in every respect.


Signature

2-10-2017
Date

CHARTER SCHOOL BOARD MEMBER INFORMATION

(To be completed individually by each proposed board member for the charter holder)

Serving on a public charter school board is a position of public trust and fiduciary responsibility. As a board member of a public school, you are responsible for ensuring the quality of the school program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, the Indiana Charter School Board requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the founding group behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

1. Name of charter school on whose Board of Directors you intend to serve:
The Green School

2. Your full name:
Theresa A. Ochoa

3. Brief educational and employment history. (No narrative response is required if resume is attached.)

Resume is attached.

4. Describe any of your previous experiences that are relevant to serving on the charter school's board (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.

This is my first experience serving on the board of a charter school. Nonetheless, I have the capability to serve as board member based on my experience colleagues in the School of Education in the development of a teacher preparation program.

5. Do you understand the obligations of a charter school's Board of Directors to comply with Indiana's Public Access laws, including the Open Door Law for Board meetings?

Yes Don't Know/ Unsure

Disclosures

1. Indicate whether you or your spouse knows the other prospective board members for the proposed school. If so, please indicate the precise nature of your relationship.

I knew Michael Beam prior to serving on the board of the Green School. It was in the capacity of our mutual involvement in the Intensive Freshmen Seminar through Indiana University. However, we did not know the other was serving on the board until we met at the first meeting. We have no other involvement outside of the IFS program and our service on the board of the Green School.

I / we do not know any such trustees. Yes

2. Indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the charter school (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the school.

I / we do not know any such persons. Yes

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

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

4. If the school intends to contract with an Education Service Provider or management organization, indicate whether you or your spouse knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship.

Not applicable because the school does not intend to contract with an education service provider or school management organization.

I / we do not know any such persons. Yes

5. If the school contracts with an education service provider, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.

N/A. I / we have no such interest. Yes

6. If the school plans to contract with an Education Service Provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.

N/A. I / we or my family do not anticipate conducting any such business.
 Yes

7. Indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.

Does not apply to me, my spouse or family. Yes

8. Indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board.

None. Yes

Certification

I, Theresa A. Ochoa, certify to the best of my knowledge and ability that the information I am providing to

the Indiana Charter School Board as a prospective board member for Charter School is true and correct in every respect.


Signature

February 13, 2014
Date

CHARTER SCHOOL BOARD MEMBER INFORMATION

(To be completed individually by each proposed board member for the charter holder)

Serving on a public charter school board is a position of public trust and fiduciary responsibility. As a board member of a public school, you are responsible for ensuring the quality of the school program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, the Indiana Charter School Board requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the founding group behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

1. Name of charter school on whose Board of Directors you intend to serve:

The Green School

2. Your full name:

Brandi Lee Smith

3. Brief educational and employment history. (No narrative response is required if resume is attached.)

Resume is attached.

4. Describe any of your previous experiences that are relevant to serving on the charter school's board (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.

I have experience on two advisory councils: 1) Sycamore Spring School, and 2) The Bloomington Winter Farmers Market. In addition, I am a founding member of TGS bringing knowledge of the group's history to the board. I will act as a liaison to the founders group, playing a role in keeping details consistent and communicated

between the two entities. If chartered, I will be the Community Outreach Coordinator for TGS.

5. Do you understand the obligations of a charter school's Board of Directors to comply with Indiana's Public Access laws, including the Open Door Law for Board meetings?

Yes Don't Know/ Unsure

Disclosures

1. Indicate whether you or your spouse knows the other prospective board members for the proposed school. If so, please indicate the precise nature of your relationship.

I / we do not know any such trustees. Yes
My husband and I are acquaintances/friends with Michael Beam.

2. Indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the charter school (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the school.

I / we do not know any such persons. Yes

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

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

4. If the school intends to contract with an Education Service Provider or management organization, indicate whether you or your spouse knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship.

Not applicable because the school does not intend to contract with an education service provider or school management organization.

I / we do not know any such persons. Yes

5. If the school contracts with an education service provider, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.

N/A. / we have no such interest. Yes

6. If the school plans to contract with an Education Service Provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.

N/A. / we or my family do not anticipate conducting any such business. Yes

7. Indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.

Does not apply to me, my spouse or family. Yes

8. Indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board.

None. Yes

Certification

I, BRANDI L. SMITH, certify to the best of my knowledge and ability that the information I am providing to

the Indiana Charter School Board as a prospective board member for Charter School is true and correct in every respect.

Brandi L. Smith

Signature

2/6/14

Date

CHARTER SCHOOL BOARD MEMBER INFORMATION

(To be completed individually by each proposed board member for the charter holder)

Serving on a public charter school board is a position of public trust and fiduciary responsibility. As a board member of a public school, you are responsible for ensuring the quality of the school program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, the Indiana Charter School Board requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the founding group behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

1. Name of charter school on whose Board of Directors you intend to serve:

The Green School

2. Your full name: **Deborah C. Wilkin**

3. Brief educational and employment history. (No narrative response is required if resume is attached.)

X Resume is attached.

4. Describe any of your previous experiences that are relevant to serving on the charter school's board (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.

I have served on several boards and have an understanding of board member responsibility and function and have been looked upon to provide my particular clinical and administrative social work skill sets to assist the organization in fulfilling its mission and meeting its performance goals and objectives.

As a licensed clinical social workers and PhD clinical psychology candidate, I bring my 30 years' experience with individuals and family systems relative to an understanding of human perception & behavior, 20 years of administrative and supervisory experience, as well as almost 10 years of academic and personal research into Autism Spectrum Disorders, specifically Asperger's Syndrome and the interface of their unique characteristics with the educational curriculum and the classroom experience.

5. Do you understand the obligations of a charter school's Board of Directors to comply with Indiana's Public Access laws, including the Open Door Law for Board meetings?

Yes Don't Know/ Unsure

Disclosures

1. Indicate whether you or your spouse knows the other prospective board members for the proposed school. If so, please indicate the precise nature of your relationship.

I / we do not know any such trustees. Yes

Yes, I know Mary Goral, founding member, who I met when we attended Hanover College as undergraduates. We have remained in touch over the years as we raised our children and developed our careers. I also know board member Karen Conner, who I recommended to the board based on my knowledge of her financial expertise through my previous professional relationship with her while working at the same not-for-profit.

2. Indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the charter school (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the school.

I / we do not know any such persons. Yes

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

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

4. If the school intends to contract with an Education Service Provider or management organization, indicate whether you or your spouse knows any

employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship.

Not applicable because the school does not intend to contract with an education service provider or school management organization.

X I / we do not know any such persons. Yes

5. If the school contracts with an education service provider, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.

N/A. X I / we have no such interest. Yes

6. If the school plans to contract with an Education Service Provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.

N/A. X I / we or my family do not anticipate conducting any such business.
 Yes

7. Indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.

X Does not apply to me, my spouse or family. Yes

8. Indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board.

x None. Yes

Certification

I, **Deborah C. Wilkin**, certify to the best of my knowledge and ability that the information I am providing to the Indiana Charter School Board as a prospective board member for Charter School is true and correct in every respect.

Deborah C. Wilkin

2.19.2014

Signature

Date

Attachment 7

The Green School Code of Ethics and Conflict of Interest Policy

Code of Ethics

Preamble

The Green School Governing Board's Code of Ethics serves as a code of conduct for the school's volunteers and paid staff. Code violations may result in sanctions imposed under the Conflicts of Interest section of the corporation's Bylaws. The principles and requirements that comprise the code and procedures are based on and are designed to ensure full compliance by Aiki Concepts, Inc. and its officers, directors, and employees with the fiduciary duties imposed on such individuals by state corporate law, the federal tax code's prohibition on private inurement and private benefit, and other requirements of federal tax exemption, common law due process requirements, federal and state antitrust and unfair competition law, state tort law, and other legal precepts and prohibitions. At the same time, the code and procedures are not designed to supplant courts of law in any resolution of disputes. Moreover, the checks and balances built into the code and procedures are designed to strike the proper balance between ensuring full compliance with the legal obligations described here and ensuring the integrity and efficacy of the code on the one hand and, on the other, the protection of Board members, through the use of reasonable due process procedures, against patently false, malicious, or groundless accusations that could result in significant organizational or personal harm if not properly handled. Members of the Board affirm their endorsement of the code and acknowledge their commitment to uphold its principles and obligations by accepting and retaining membership on the Board.

Governing Board Code of Ethics

Members of the Board (including ex officio members of the Board) shall at all times abide by and conform to the following code of conduct in their capacity as Board members:

1. Each member of the Governing Board will abide in all respects by the *Governing Board Code of Ethics* and all other rules and regulations of the organization (including but not limited to the organization's articles of incorporation and bylaws) and will ensure that their membership (or the membership of the entity for which they serve as officer, director, employee, or owner, as the case may be) in the organization remains in good standing at all times. Furthermore, each member of the Board of directors will at all times obey all applicable federal, state and local laws and regulations and will provide or cause to provide the full cooperation of the organization when requested to do so by those institutions and their persons set in authority as are required to uphold the law.
2. Members of the Governing Board will conduct the business affairs of the organization in good faith and with honesty, integrity, due diligence, and reasonable competence.
3. Except as the Governing Board may otherwise require or as otherwise required by law, no Board member shall share, copy, reproduce, transmit, divulge or otherwise disclose any confidential information related to the affairs of the organization or individual students and each member of the Board will uphold the strict confidentiality of all meetings and other deliberations and communications of the Governing Board.

4. Members of the Governing Board will exercise proper authority and good judgment in their dealings with organization staff, suppliers, and the general public and will respond to the needs of the organization in a responsible, respectful, and professional manner.
5. No member of the Board of directors will use any information provided by the organization or acquired as a consequence of the Board member's service to the organization in any manner other than in furtherance of his or her Board duties. Further, no member of the Governing Board will misuse organization property or resources and will at all times keep the organization's property secure and not allow any person not authorized by the Board of directors to have or use such property.
6. Each member of the Governing Board will use his or her best efforts to regularly participate in professional development activities and will perform his or her assigned duties in a professional and timely manner pursuant to the Board's direction and oversight.
7. Upon termination of service, a retiring Board member will promptly return to the organization all documents, electronic and hard files, reference materials, and other property entrusted to the Board member for the purpose of fulfilling his or her job responsibilities. Such return will not abrogate the retiring Board member from his or her continuing obligations of confidentiality with respect to information acquired as a consequence of his or her tenure on the Governing Board.
8. The Governing Board dedicates itself to leading by example in serving the needs of the organization and its members and also in representing the interests and ideals of Public Schools at large.
9. No member of the Governing Board shall persuade or attempt to persuade any employee of the organization to leave the employ of the organization or to become employed by any person or entity other than the organization. Furthermore, no member of the Governing Board shall persuade or attempt to persuade any member, exhibitor, advertiser, sponsor, subscriber, supplier, contractor, or any other person or entity with an actual or potential relationship to or with the organization to terminate, curtail, or not enter into its relationship to or with the organization, or to in any way reduce the monetary or other benefits to the organization of such relationship.
10. The Governing Board must act at all times in the best interests of the organization and not for personal or third-party gain or financial enrichment. When encountering potential conflicts of interest, Board members will identify the conflict and, as required, remove themselves from all discussion and voting on the matter. Specifically, Board members shall follow these guidelines:
 - Avoid placing (and avoid the appearance of placing) one's own self-interest or any third-party interest above that of the organization; while the receipt of incidental personal or third-party benefit may necessarily flow from certain organization activities, such benefit must be merely incidental to the primary benefit to the organization and its purposes;
 - Do not abuse Board membership by improperly using Board membership or the organization's staff, services, equipment, resources, or property for personal or third-party gain or pleasure; Board members shall not represent to third parties that their authority as a Board member extends any further

than that which it actually extends;

- Do not engage in any outside business, professional or other activities that would directly or indirectly materially adversely affect the organization;
- Do not engage in or facilitate any discriminatory or harassing behavior directed toward organization staff, members, officers, directors, meeting attendees, exhibitors, advertisers, sponsors, suppliers, contractors, parents, students or others in the context of activities relating to the organization;
- Do not solicit or accept gifts, gratuities, free trips, honoraria, personal property, or any other item of value from any person or entity as a direct or indirect inducement to provide special treatment to such donor with respect to matters pertaining to the organization without fully disclosing such items to the Governing Board; and
- Provide goods or services to the organization as a paid vendor to the organization only after full disclosure to, and advance approval by, the Board, and pursuant to any related procedures adopted by the Board.

Conflict of Interest Policy

It is the policy of the Corporation and its Governing Board that the Corporation's directors, officers, and employees carry out their respective duties in a fashion that avoids actual, potential, or perceived conflicts of interest. The Corporation's directors, officers, and employees shall have the continuing, affirmative duty to report any personal ownership, interest, or other relationship that might affect their ability to exercise impartial, ethical, and business-based judgments in fulfilling their responsibilities to the Corporation. This policy shall be further subject to the following principles:

- (a) Directors, officers, and employees of the Corporation shall conduct their duties with respect to potential and actual grantees, contractors, suppliers, agencies, and other persons transacting or seeking to transact business with the Corporation in a completely impartial manner, without favor or preference based upon any consideration other than the best interests of the Corporation.
- (b) Directors, officers, and employees of the Corporation shall not seek or accept for themselves or any of their relatives (including spouses, ancestors, and descendants, whether by whole or half blood), from any person or business entity that transacts or seeks to transact business with the Corporation, any gifts, entertainment, or other favors relating to their positions with the Corporation that exceed common courtesies consistent with ethical and accepted business practices.

- (c) If a director, or a director's relative, directly or indirectly owns a significant financial interest in, or is employed by, any business entity that transacts or seeks to transact business with the Corporation, the director shall disclose that interest or position and shall refrain from voting on any issue pertaining to the transaction.
- (d) Officers and employees of the Corporation shall not conduct business on behalf of the Corporation with a relative or a business entity in which the officer, employee, or his or her relative owns a significant financial interest or by which such officer, employee, or relative is employed, except where such dealings have been disclosed to, and specifically approved and authorized by, the Governing Board of the Corporation.
- (e) The Governing Board may require the Corporation's directors, officers, or employees to complete annually (or as otherwise scheduled by the Board) a disclosure statement regarding any actual or potential conflict of interest described in these Bylaws. The disclosure statement shall be in such form as may be prescribed by the Board and may include information regarding a person's participation as a director, trustee, officer, or employee of any other nonprofit organization. The Governing Board shall be responsible for oversight of all disclosures or failures to disclose and for taking appropriate action in the case of any actual or potential conflict of interest transactions.

Attachment 8

Core Curriculum Scope and Sequence

Grades K-8

Language Arts Curriculum Overview

The Green School believes learning to read well is the cornerstone of creating equitable outcomes for our students. While listening, reading, and writing are integrated into every aspect of our curriculum, they are highlighted here to show how TGS will develop students' literacy skills through an integration of Readers and Writers Workshop and the core practices of the morning lesson, the morning lesson book, and afternoon skill classes. Teachers also draw upon the well-researched methods of teaching language arts, including the Whole Language method and the Five Block method.

Kindergarten/First Grade

Literacy instruction begins with the strengths students already bring to school – oral language. The focus on oral language development happens through daily listening to artistically told stories. Stories are drawn from anthologies of fables, fairy tales (Grimm) and nursery rhymes. This meets Common Core Standards, grades K/1 in Comprehension and Collaboration, the Presentation of Knowledge and Ideas in Speaking and Listening, as well as Conventions of Standard English; and Vocabulary Acquisition and Use in Language.

At The Green School, teachers use alliteration in songs, riddles, tongue twisters, and poems as well as games to encourage phonemic awareness development with the whole class. Being cognizant of English Language Learners, teachers will build each student's ability to recognize English phonemes that correspond to phonemes they already hear and produce in their primary language at home and in the community, as well as English phonemes that do not correspond to sounds students hear in their native language. This meets Common Core Standards, grades K/1 in Comprehension and Collaboration, the Presentation of Knowledge and Ideas in Speaking and Listening, as well as Conventions of Standard English, and Vocabulary Acquisition and Use in Language.

In keeping with the method of teaching from whole to part, teachers will move from the holistic verbal wordplay and storytelling to the more concrete and specific research-based Readers Workshop strategies for blending and segmenting words orally. This integrated process allows the teacher to address listening, speaking, and viewing skills, which are all part of getting students to read. This meets Common Core Standards, grades K/1 in Comprehension and Collaboration, the Presentation of Knowledge and Ideas in Speaking and Listening, as well as Conventions of Standard English, and Vocabulary Acquisition and Use in Language.

In addition to hands-on, engaging activities to build phonemic awareness, students are invited to discuss the stories they listen to in order to practice beginning comprehension skills, sequencing skills, and oral articulation skills. Students are encouraged to respond to the literature they are exposed to by making personal connections to the text. They also make predictions and clarify their understanding of the text through these discussions. This meets Common Core Standards, grades K/1 in Comprehension and Collaboration, the Presentation of Knowledge and Ideas in Speaking and Listening, as well as Conventions of Standard English, and Vocabulary Acquisition and Use in Language.

The above activities are drawn from the Readers Workshop materials that support the instruction of comprehension strategies. During this time students build their skills at retelling the story (summarizing, drawing inferences, and sequencing events in the story). Students have access to leveled library and trade literature as well as pre-decodable texts that provide the opportunity to practice blending strategies and high frequency words they are learning. This meets Common Core Standards, grades K/1 in Comprehension and Collaboration, the Presentation of Knowledge and Ideas in Speaking and Listening, Conventions of Standard English, and Vocabulary Acquisition and Use in Language, as well as Print Concepts, Phonological Awareness, Phonics and Word Recognition and Fluency in Reading Foundational Skills.

Moving from the whole to part, the teacher builds on the oral language work to introduce students to the alphabet through multicultural stories and fairy tales. Using their morning lesson books, students make drawings of letters suggested by the sounds or names of objects from the story. Students practice their writing and penmanship by transcribing sentences taken from oral stories. This meets Common Core Standards, grades K/1 in Comprehension and Collaboration, the Presentation of Knowledge and Ideas in Speaking and Listening, Conventions of Standard English, and Vocabulary Acquisition and Use in Language, Key Ideas and Details, Craft and Structure, Integration of Knowledge and Ideas in Reading Standards for Literature, Print Concepts, Phonological Awareness, Phonics and Word Recognition and Fluency in Reading Foundational Skills, as well as Text Types and Purposes, and Production and Distribution of Writing.

Students also experience writing through the daily skills class called Writers Workshop. Writing sentences, paragraphs, and stories from personal experience and from stories heard make up the bulk of this practice period. This meets Common Core Standards, grades K/1 in Comprehension and Collaboration, the Presentation of Knowledge and Ideas in Speaking and Listening, Conventions of Standard English, and Vocabulary Acquisition and Use in Language, as well as Text Types and Purposes, Production and Distribution of Writing, and Research to Build and Present Knowledge in Writing.

TGS' goal is that by the end of first grade, students will be able to recognize letter sounds and blends, will have mastered the majority of the first 100 standard sight words, and be able to read with sufficient accuracy and fluency to support comprehension. This will meet the Standard Range of Reading and Level of Text Complexity for Grade 1 as set forth in the Reading Standards of the Common Core.

Second/Third Grade

Students at these grade levels are working toward building solid reading, writing, listening, and thinking skills, and meeting standards set forth for these grade levels in the Language Arts. Using the strategies and structures introduced in kindergarten and first grade, students continue to use oral storytelling to authenticate reading and writing practices.

Activities and texts for practice are taken from anthologies of legends and fables for second grade (Aesop, Celtic legends) and from multicultural creation stories for third grade. This meets Common Core Standards, grades 2/3 in Key Ideas and Details, Craft and Structure, Integration of Knowledge and Ideas in Reading; Text Types and Purposes, and Production and Distribution of Writing; Comprehension and Collaboration, and the Presentation of Knowledge and Ideas in Speaking and Listening, as well as Conventions of Standard English, and Vocabulary Acquisition and Use in Language.

The emphasis in 2nd and 3rd grade language arts is on knowing and applying grade-level phonics and word analysis skills in decoding words. Decodable texts provide opportunities for students to practice their growing decoding skills. While continuing to work on their word recognition skills, students are experimenting with word play and curious about how words that capture their attention – synonyms, homonyms, antonyms, and palindromes – work. The teacher uses the excitement and curiosity at this stage to introduce word parts, as in roots and prefixes. This meets Common Core Standard, grades 2/3 in Foundational Skills in Reading.

Systemic word study in which the student is able to make strong, explicit connections between decoding, spelling, and vocabulary becomes more prominent in the third grade. In a systemic and sequenced way, students use the tools of word study to build word consciousness as they learn more about how words work – spelling patterns and common prefixes and suffixes. Students are introduced to grammar and punctuation through storytelling and games. Writing continues through daily skills classes in Writers Workshop and in writing in their main lesson books. This meets Common Core Standards, grades 2/3 in Foundational Skills in Reading.

As a result of the literacy activities, TGS' ELL students will be able to recognize common English morphemes in phrases and simple sentences. They will be able to demonstrate an internalization of English grammar, usage, and word choice by recognizing and correcting common errors English learners make when speaking or reading aloud, especially with plurals and word endings, which represent different syntactic structures between English and their native language.

TGS' goal is that students will leave the third grade being able to read and write on or above grade level texts with accuracy and understanding, satisfying or exceeding the range of reading and level of text complexity set forth in the third grade Reading Standards of the Common Core.

Fourth/Fifth Grade

Building on the students' growing decoding skills, teachers at this stage of TGS' education program emphasize vocabulary development and comprehension skills. Students read from a variety of texts – respected fiction, rigorous non-fiction, and articles from magazines and newspapers. This meets Common Core Standards, grades 4/5 in Comprehension and Collaboration, the Presentation of Knowledge and Ideas in Speaking and Listening; Conventions of Standard English, and Vocabulary Acquisition and Use in Language; Key Ideas and Details, Craft and Structure, Integration of Knowledge and Ideas in Reading Standards for Literature and Informational Text; and Print Concepts, Phonological Awareness, Phonics and Word Recognition and Fluency in Reading Foundational Skills.

Readings can be drawn from the traditional Waldorf curriculum of Norse mythology, ancient civilizations and Greek mythology, and/or from students' interests. Students use these texts to strengthen their comprehension skills, including looking at text structures and the structure of the author's argument or thesis. They learn these skills through classroom discussion during the morning lesson period and through skills periods that feature Readers and Writers Workshop. This meets Common Core Standards, grades 4/5 in Comprehension and Collaboration, the Presentation of Knowledge and Ideas in Speaking and Listening; Conventions of Standard English, Vocabulary Acquisition and Use in Language; Key Ideas and Details, Craft and Structure, Integration of Knowledge and Ideas in Reading Standards for Literature and Informational Text; Print Concepts, Phonological Awareness, Phonics and Word Recognition and Fluency in Reading Foundational Skills.

As a result, TGS' ELL students will be able to use text structures to enhance their reading comprehension and writing skills. They will be able to recognize simple idioms, analogies, figures of speech, and metaphors in literature and texts.

Students' writing instruction, which takes place during morning lesson as well as Writers Workshop, focuses on writing opinion pieces where they support a point of view, writing informative pieces to convey information, and writing narratives to develop real and imagined experiences, satisfying grade-level Common Core Standards in Text Types and Purposes, Production and Distribution of Writing and Research to Build and Present Knowledge in Writing.

TGS' goal is that its students leave fifth grade with the foundation of academic literacy and critical thinking skills, able to read and write on or above grade level, satisfying or exceeding Language Arts Standards of the Common Core.

Sixth, Seventh, and Eighth Grade

Reading. Students will read books in a range of styles and give verbal summaries of the main content. They will give written summaries of books, highlighting main characters and events in the narrative. Students will be able to compare and contrast a text (e.g. characters, genre, cultural differences, fact or fiction) and determine cause and effect relationships. They will be able to confirm the meaning of figurative, idiomatic, and technical language

using contextual cues. Students will use books as references and resources for research projects and will be able to use other resources aptly, including the thesaurus, dictionary, and foreign language dictionaries. This meets Common Core Standards, grades 6/7/8 in Word Recognition, Fluency, Vocabulary Development and Comprehension; Analysis of Nonfiction and Informational Text; Comprehension and Analysis of Literary Text in Reading; Processes and Features, Applications, English Language Conventions in Writing; Skills, Strategies, and Applications in Listening and Speaking.

Writing. Students will learn to write in different styles including an account of a scientific experiment, a personal reflection, descriptive writing evoking a mood, short stories, poems, formal business letters and letters of inquiry. Students will produce a wide variety of expository, descriptive, and narrative writing. They will follow outlines as they write original research papers that state a thesis, develop the thesis, and provide a concluding statement supporting their point of view. Newspaper reports, business and practical compositions, and an original short story will be drafted, revised, and rewritten. Students will write a personal experience narrative that develops a story line in a sequence that is clear and uses figurative language and descriptive words and phrases. They will use logical sequence and provide support through facts, details, examples, and descriptions that are appropriate, directly related to the topic, and cite sources appropriately. This meets Common Core Standards grades 6/7/8 in Processes and Features, Applications, and English Language Conventions in Writing.

Speech and Drama. Students will debate and discuss historical problems, current events, and classroom issues. They will accurately retell and/or dramatize stories and experiments. Choral speaking will be offered and will include passages from important historical texts, eye-witness accounts of important world events, authors, playwrights, and social/political leaders such as Shakespeare, Arthur Miller, and Martin Luther King, Jr. Students may produce a Shakespearean or modern play. This meets Common Core Standards, grades 6/7/8 in Comprehension, Organization and Delivery of Oral Communication, Analysis of Oral and Media Communications, and Speaking Applications in Listening and Speaking.

See Attachment 9 for eighth grade exit standards in Language Arts.

Math Curriculum Overview

As is the case in literacy instruction, the mathematics curriculum in the early grades is not based on a text series, but on the historically proven Waldorf curriculum, backed by teacher resources. We suggest that teachers use the well-researched “Elementary and Middle School Mathematics” by Van de Walle, et. al (2010), as well as mathematics methods text “Helping Children Learn Mathematics” by Reys, Lindquist, Lambdin, and Smith (2009). When students reach fourth grade, we intend to use the Singapore Math Curriculum in addition to main lesson blocks that focus on specific mathematics topics. However, should a better math program present itself prior to the opening of TGS, a change will be considered.

Kindergarten/First Grade

Kindergarten students come to school already possessing a certain number sense based on their personal experience. Teachers first begin by helping children enhance their number sense through learning about the quality of numbers. Books such as Dorothy Harrar's "Teaching Mathematics in the Elementary Grades" and "Active Arithmetic" by Henning Andersen will be available for teachers' use. This will meet Common Core Standards, grades K/1 in Counting and Cardinality, and Measurement and Data.

This is followed by a development of number sense, including counting, patterning, grouping, classification and place value. Students also learn to read and write the numbers through number stories and practice. This will meet Common Core Standards, grades K/1 of Counting and Cardinality, Measurement and Data, and Number and Operations in Base Ten.

Next, the introduction of the four processes takes place. In the traditional Waldorf curriculum, students learn addition, subtraction, multiplication, and division together, rather than separately. Students are introduced to these processes through stories and learn the basic facts to 100 through movement, music, poetry, and traditional paper and pencil skill work. This will meet Common Core Standards, grades K/1 in Operation and Algebraic Thinking.

Other math concepts, such as measurement and geometry, are learned through the Waldorf subject of form drawing.

Second/Third Grade

Students expand their study of place value. A thorough understanding of place value is necessary if computational algorithms for addition, subtraction, multiplication, and division are to be used in a meaningful way. Teachers again use storytelling to introduce this concept. By using stories to introduce abstract mathematics concepts, students are better able to understand and engage in the material (Goral, 2006). Teachers also use many different models, such as base ten blocks and money, in order for students to get a firm grasp of this concept. This study of place value meets Common Core Standards, grades 2/3 in Number and Operations in Base Ten.

The teaching of higher-level algorithms can now begin. Again, teachers use a variety of examples gleaned from well-researched methods (Van de Walle, et. al 2010; Reys, et al, 2009). These studies meet Common Core Standards, grades 2/3 related to Operations and Algebraic Thinking.

The memorization of basic facts through 144 helps students with the above-mentioned algorithms and with mental math, a practice that occurs daily. This will meet Common Core Standards, grades 2/3 related to Operations and Algebraic Thinking.

Measurement, time, and money are topics learned through hands-on projects such as building actual structures and giving students opportunities to sell things they have grown

in the garden and/or made in practical arts classes. This will meet Common Core Standards, grades 2/3 in Measurement and Data.

Common Core Standards in Geometry, grades 2/3 are met through Form Drawing classes. Further, geometry and measurement are learned in the creation of square foot raised garden beds.

Informal work with fractions occurs in Form Drawing classes and through building projects and cooking, meeting Common Core Standards, grade 3 in Number and Operations.

Fourth/Fifth Grade

Students are introduced to an in-depth study of fractions through stories, poetry, music, movement, and art. They learn to add, subtract, multiply and divide fractions first in a concrete pictorial way (see www.pythagoras.com) and then by learning the traditional algorithm. This will meet Common Core Standards, grades 4/5 in Number and Operations.

Decimal fractions are then introduced, which leads naturally into a study of decimals, meeting additional Common Core Standards, grade 4/5 in Number and Operations.

A thorough study of long division is brought to students at this time. Again, students learn long division through story, poetry, music, movement, and art. They use manipulatives and learn from the whole to the part, or concrete to semi-concrete to the abstract algorithm. This meets Common Core Standards, grades 4/5 in Operations and Algebraic Thinking.

Common Core Standards, grades 4/5 in Measurement and Data and Geometry are met through Form Drawing and the study of local and state geography.

In fourth grade, students begin using textbooks, and as previously mentioned, we have chosen Singapore Math, as we believe it best fits with The Green School's method of instruction.

Continued work with higher-level algorithms, mental math and advanced place value takes place in both grades, fulfilling Common Core Standards, grades 4/5 in Operations and Algebraic Thinking, Number and Operations in Base Ten, and Number and Operations.

Sixth, Seventh, and Eighth Grade

Students will use the Singapore math series in their skills classes on a daily basis. This is also the time for any remediation or advanced study to occur.

An in-depth study of geometric drawing (two-dimensional) takes place in sixth grade. Teachers can refer to the book *Geometric Drawing in the Waldorf School* by Herman Von Baravelle. Seventh graders study two-dimensional geometry and learn formulas for a variety of figures. Eighth graders learn three-dimensional and solid geometry along with formulas and theorems. This meets Common Core Standards, grades 6/7/8 in Geometry.

Business math, including the study of profit/loss/percentages/interest is taught along with the actual hands-on project of fund raising for service work. This meets Common Core Standards, grades 6/7/8 in Ratios and Proportional Relationships, The Number System, and Expressions and Equations.

Students are introduced to pre-algebra in sixth and seventh grade and Algebra in eighth grade. This study takes place in an in-depth manner in morning lesson blocks as well as in the math textbook. These studies meet Common Core Standards, grades 6/7/8 in Ratios and Proportional Relationships, The Number System, Expressions and Equations, and Statistics and Probability.

Science Curriculum Overview

The science curriculum at our school begins with nature studies in the primary grades. This includes the study of plants, animals, the moon, sun and stars, and weather patterns. We intend to integrate our Education for Sustainability (EfS) curriculum with nature studies for the younger children. This work is based on research conducted by Sobel (Place-Based Education), Bourne (Taking Inquiry Outdoors), and Cornell (Sharing Nature with Children) to name a few. Please see Appendix for a complete description of our EfS standards. Beginning in fourth grade, students have the opportunity to delve deeply into the scientific study of zoology, followed by botany and more zoology in fifth grade. State standards also require that fifth grade students study both physical and earth science. Many of the physical science standards will be covered in math class as well, and the earth science standards can be found in the EfS curriculum. Geology, astronomy, and physics are covered in sixth grade; chemistry, astronomy, health and physics in seventh grade; and meteorology, anatomy, physics and chemistry in eighth grade.

The above mentioned science morning lessons for the upper grades are characterized by a phenomenological approach. Students observe and participate in experiments and activities, conduct their own experiments, and write and illustrate these in their lesson books. Teachers also tell students biographies of famous scientists in order to familiarize students with the humanity behind the science. Students read and analyze science/technical literature, with an eye for key ideas and details. Furthermore, students are asked to read and research certain scientific topics and learn to distinguish among facts in order to summarize findings.

Kindergarten

The kindergarten science curriculum is nature-oriented in keeping with the awakening capacities of the young child below the age of seven. This is a foundational piece to science and an ecological education. The children develop a connection to the earth and the seasons as they observe all of the changes in the garden and the weather. The children can

observe the changing life of the garden, and best of all they get to eat what they have planted. They help to prepare the ground, plant the seeds and care for the plants. They learn to know which plants are ready to harvest, and how to help prepare the food. They develop respect for the earth and the plants while tending them and noting the recurring life cycle of the garden as a whole and its inhabitants. This provides a solid foundation for botany and ecology. Indiana State Science Standards met in kindergarten include Physical Science – Observe, manipulate, sort and generate questions about objects and their physical properties. (K.1.1, K.1.2). Earth and Space Science – Observe, record and recognize patterns and generate questions about night and day and the seasons. (K.2.1-K.2.3). Life Science – Observe living organisms, compare and contrast their characteristics, and ask questions about them. (K.3.1-K.3.3).

1st Grade

Students in first grade will participate in learning about science through nature stories, nature walks, observations, and gardening. Through weekly garden time and inquiry-based explorations of nature, students develop fundamental scientific skills of observation, curiosity, and respect for the natural world. Indiana State Science Standards met in 1st grade include Physical Science – Describe objects in terms of the materials that compose them and in terms of their physical properties. (1.1.1-1.1.3). Earth and Space Science – Observe, describe, and ask questions about soil components and properties. (1.2.1-1.2.4). Life Science – Observe, describe, and ask questions about living things and their relationship to their environment. (1.3.1-1.3.5). Science, Engineering, and Technology – Determine properties of natural and man-made materials and their most important uses. (1.4.1-1.4.3).

2nd Grade

Second grade science includes the study of plants, animals, the moon, sun and stars, and weather patterns. We intend to integrate our Education for Sustainability (EFS) curriculum with nature studies for the younger children. Students will work in the school garden, planting and cultivating vegetables, take nature walks and observe the sun, moon, and stars. Weather patterns will be observed on a regular basis. Indiana State Science Standards met in the 2nd grade include Physical Science – Observe and describe that the properties of materials can change, but not all materials respond in the same way to the same action. (2.1.1-2.1.3). Earth and Space Science – Day to day and over the seasons, observe, measure, record, and recognize patterns and ask questions about features of weather. (2.2.1-2.2.6). Investigate how the position of the sun and moon change in observable patterns. (2.2.7-2.2.9). Life Science – Observe, ask questions, and describe how organisms change their forms and behaviors during their life cycles. (2.3.1, 2.3.2). Science, Engineering, and Technology – Describe how technologies have been developed to meet human needs. (2.4.1-2.4.3)

3rd Grade

Farming and gardening lessons instruct the child in the importance of the natural systems that support our lives, in the use of farming tools and farming and gardening processes, and how food has been grown over the centuries. These lessons give the child an opportunity for direct involvement in growing his/her own food and begin to establish a foundation for their appreciation of our partnership with nature and an interest in fostering, protecting and preserving the world around them.

The provision of clothing is addressed in the textiles unit, usually beginning with the shearing of a sheep and culminating in a woven or knitted garment from that sheep's wool. The child is involved in every practical aspect of the making of the garment. Many types of shelter are presented, modeled and discussed with the students, and some shelters are constructed by the children with the teacher's guidance. A unit on building a modern house teaches the critical importance of cooperation amongst architects, contractors, and construction workers as they meet the wide variety of human needs for shelter. Indiana State Science Standards met in 3rd grade include Physical Science – Observe and describe how sound is produced by vibrations. (3.1.1-3.1.3). This standard is met in the music curriculum and in 6th grade science. Observe and describe how light travels from point to point. (3.1.4-3.1.6). This standard is met in 6th grade science. Earth Science – Observe, describe, and identify rocks by their specific properties. (3.2.1-3.2.4). This standard is met in 6th grade science. Observe and describe how materials meet the needs of plants and animals (including humans). (3.2.5, 3.2.6). Life Science – Observe, describe, and ask questions about plant growth and development. (3.3.1, 3.3.2). Science, Engineering, and Technology – Define a real world problem and list criteria for a successful solution. (3.4.1, 3.4.2).

4th Grade

In the fourth grade, animal study is introduced, growing out of a descriptive study of the human being and our place in nature. The child develops an understanding and appreciation of the animal kingdom as it reflects the environment to which each species has adapted. Through detailed study of the forms and habitats of animals, the children begin to get a feeling for the fascinating assortment of skills and qualities that the animals possess. At the same time, the children begin to see the unique and responsible position they hold as human beings upon the earth. This detailed study offers opportunities for the child to develop his/her comparative, conceptual, and observational skills, and it provides additional material for artistic, dramatic, and language arts activities. Indiana State Science Standards met in 4th grade include Physical Science – Provide evidence that heat and electricity are forms of energy. (4.1.1,4.1.2). Design and assemble electric circuits and provide a means of transferring energy from one form or place to another. (4.1.3-4.1.5) This standard is met in 6th grade. Earth Science – Observe, investigate and give examples of ways that the shape of land changes over time (4.2.1,4.2.3). This standard is met in the Geography curriculum. Describe how the supply of natural resources is limited and

investigate ways that humans protect and harm the environment. (4.2.4-4.2.6). This standard is met in the EfS curriculum. Life Science – Observe, describe, and ask questions about structures of organisms and how they affect their growth and survival. (4.3.1-4.3.4). Science, Engineering, and Technology – Design a moving system and measure its motion. (4.4.1-4.4.4). This standard is met in 7th grade.

5th Grade

The science curriculum for the fifth grade focuses on the plant kingdom. Besides the discovery of the physical characteristics of the earth, studied in geography at this grade (see Social Studies Curriculum), the fifth grader studies the plant life that grows upon its surface. They learn that the world of plants is made up of many different families, from the simple mushroom to the rose to the mighty oak tree; the scope of the lessons then expands to an investigation of how climate and geography affect plant growth. The children learn that there is order and structure in all that surround them in the natural world. Indiana State Science Standards met in 5th grade include Physical Science – Describe the weight and volume and measure the weight and volume of various objects. (5.1.1, 5.1.2) This standard is met in the math curriculum. Life Science – Observe, describe, and ask questions about how changes in one part of our ecosystem create changes in other parts of the ecosystem. (5.3.1, 5.3.2)

6th Grade

In sixth grade, the study of the physical body of the earth and its mechanical laws is introduced. Mineralogy and Geology form a major unit of study in the sixth grade, focusing on comparative studies of major geographic and geologic formations, and on the identification and classification of mineral components of rocks. Physics is also introduced this year. During the course of study, the child learns to understand and appreciate the phenomena of sound, light, heat, electricity, and magnetism, while developing his/her observational and explanatory skills. It is at this stage that concepts based on the laws of mechanics are introduced. The study of Astronomy is introduced this year, concentrating on those bodies of the solar system that are directly observable by the naked eye. The effects of the Sun and the Moon on the cyclical phenomena we experience on Earth are explored through observation and simple experimentation. The five "visible" planets are studied, and the major constellations of the Northern Hemisphere are identified. The telling of the myths behind the names of the constellations provides rich material for the creative writing exercises in sixth grade. Indiana State Science Standards met in 6th grade include Physical Science – Understand that there are different forms of energy with unique characteristics. (6.1.4-6.1.7). Earth and Space Science – Understand the relationship between celestial bodies and force that keeps them in regular predictable motion. (6.2.1-6.2.5). Life Science – These standards are met in 5th grade. Science, Technology and Engineering – Apply a form of energy to design or construct a simple mechanical device. (6.4.1-6.4.3)

7th Grade

Work continues with physics. In mechanics, simple machines are introduced: the lever, inclined plane, wedge, wheel and axle, pulley and screw. The concepts of effort and resistance are presented, and in their calculation the child is reinforced in his/her understanding of ratio. Work in optics, heat, electricity, and magnetism is extended, with an emphasis on the practical application of these phenomena. The detailed observation of nature now leads the students back to a study of the human being. The seventh grade curriculum includes physiology units on the circulatory, respiratory, and nervous systems. At this age the children are particularly able to look at issues of health and nutrition in an objective way. The class considers those factors that foster health or illness in the human being, including an exploration of how various substances can promote one or the other condition. Work with chemistry also begins in the seventh grade, with students examining the phenomena of combustion, the water cycle, and the nature of acids and bases. They discover through observation the properties of various substances and the ways in which they interrelate. Accurately executed descriptions and drawings are an integral part of this unit. In physics the children study the laws of refraction, reflection, heat, and electricity. Indiana State Science Standards met in 7th grade include Physical Science - Explain that energy cannot be created or destroyed but instead can only be changed from one form into another or transferred from place to place. (7.1.1 - 7.1.7) Earth and Space Systems - Describe how earth processes have shaped the topography of the earth and have made it possible to measure geological time. (7.2.1 - 7.2.8) Science, Technology and Engineering - Design and construct a device that converts energy from one form to another to perform work. (7.4.1 - 7.4.4)

8th Grade

The science curriculum in the eighth grade encompasses physics, meteorology, chemistry and anatomy. The teacher demonstrates how the discovery and application of scientific principles contributed directly to the development of our modern technological society. In physics, the study of acoustics, optics, heat and electro-magnetism is extended through hydraulics and aeromechanics. The organic chemistry block covers sugars, starches, proteins, and fats-- focusing on those processes by which organic substances are formed (e.g., photosynthesis) and transformed (as in digestion). Health, hygiene and nutrition are also addressed. Indiana State Science Standards met in 8th grade include Physical Science - Describe how atomic structures determine chemical properties and how atoms and molecules interact. (8.1.1-8.1.8). Earth and Space Systems - Explain how the sun's energy heats the air, land, and water and drives the processes of wind, ocean currents and the water cycle. (8.2.1 -8.2.5). Describe how human activities have changed the land, water and atmosphere. (8.2.6, 8.2.7). Life Science - Understand the predictability of characteristics from parents to offspring. (8.3.1-8.3.7). Science, Technology and Engineering - Identify the appropriate materials to be used to solve a problem based on their specific properties and characteristics. (8.4.1-8.4.3)

Common Core Standards met in Grades 6-8 in Science and Technical Subjects includes all aspects of Reading in Science and Technical Subjects: Key Ideas and Details; Craft and Structure; Integration of Knowledge and Ideas; Range of Reading and Levels of Text Complexity. All aspects of Writing in Science and Technical Subjects are also met: Text Types and Purposes; Production and Distribution of Writing; Research to Build and Present Knowledge; and Range of Writing.

Social Studies Curriculum Overview

The early grades (K, 1, and 2) social studies curriculum is interwoven with the EfS curriculum. The focus is community, including community building in the classroom, community service, and a study of the local community. Beginning in third grade, students engage in a multicultural study of prehistory. These stories from around the world give students a sense of the global community. Stories are drawn from Native American, African, Asian, South American, and European sources. Fourth graders embark on a study of local and state geography/history. Stories and mapmaking, music, movement and poetry are the means through which students learn the material. Fifth graders study ancient civilizations, including India, Persia, Mesopotamia, Egypt, and Babylon. They also study Greek History and the beginnings of government and economics. US History, Government, and Geography are also covered. Sixth graders delve into the study of South American geography, Roman history, the Crusades, and the Middle Ages. In seventh grade, students study the Renaissance, the Reformation, and African/Asian Geography. Finally, eighth graders study revolutions from around the world, United State geography and history from the explorers to present day.

Kindergarten

Kindergarten students hear nature stories, take nature walks, observation nature and work in the garden. They hear multicultural stories, participate in school festivals and experience different types of foods (cooking and tasting). Students learn to be a part of a community of learners and through the EfS curriculum participate in community service projects. Indiana State Standards met include History – Students examine the connections of their own environment with the past, begin to distinguish between events and people of the past and the present, and use a sense of time in classroom planning and participation. (K.1.1-K.1.5). Civics and Government – Students learn that they are citizens of their school, community, and the United States, identify symbols of the nation, and understand the importance of being a responsible citizen who knows why rules are needed and follow them. (K.2.1-K.2.5). Geography – Students learn that maps and globes are different representations of the earth’s surface and begin to explore the human geographic characteristics of their school, neighborhood and community. (K.3.1-K.3.7). This standard is also met in 4th grade. Economics – Students explain that people do different jobs and work to meet basic economic wants. (K.4.1-K.4.4).

1st Grade

In first grade students hear multicultural stories and participate in class and school community building. In the EfS curriculum, students participate in community service projects and engage in developmentally appropriate service work for the classroom and school. Students observe nature on a daily basis through nature walks and work in the school garden. Indiana State Standards met include History – Students will identify continuity and change in the different environments around them, including school and neighborhood communities, and identify individuals, events and symbols that are important to our country. (1.1.1-1.1.10). This standard is also met in 2nd grade. Civics and Government – Students will explain the meaning of government, explain why rules and laws are needed in the school and community. They identify individual rights and responsibilities, and use a variety of sources to learn about the functions of governments and the roles of citizens. (1.2.1-1.2.6). Geography – Students will understand the basic elements of maps and globes and basic facts concerning relationships of the sun to daily and seasonal weather. They will identify selected geographic characteristics of their home, school and neighborhood. (1.3.1-1.3.9). This standard is also met in 4th grade. Economics – Students will explain how people in the school and community use goods and services and make choices as both producers and consumers. (1.4.1-1.4.6). This standard is also met in 3rd grade.

2nd Grade

Students in second grade study multicultural stories that tell about people from all over the world. Lives of inspiring people who affected history are also studied and compared to the children's own lives and involvement in their community. In the EfS curriculum, students will be involved in service activities for the local community. Indiana State Standards met include History – Students will differentiate between events that happened in the past and recently, recognize examples of continuity and change in local and regional communities, and recognize that the ways of people and events in the past and present influence their lives. (2.1.1-2.1.7). Civics and Government – Students will understand why communities have governments and laws, demonstrate that people in the United States have both rights and responsibilities, and identify individual actions that contribute to the good of the community and the nation. (2.2.1-2.2.7). Geography – Students will locate their community, state and nation on maps and globes; identify major geographic features of their local community; and explore geographic relationships between the physical and environmental characteristics of their community. (2.3.1-2.3.7). This standard is also met in 4th grade. Economics – Students will describe how people in a community use productive resources, create a variety of businesses and industries, specialize in different types of jobs and depend on each other to provide goods and services. (2.4.1-2.4.8). This standard is also met in 3rd grade.

3rd Grade

Beginning in third grade, students engage in a multicultural study of early history. These stories from around the world give students a sense of the global community. Stories are drawn from Native American, African, Asian, South American, and European sources. Children in third grade participate in the study of time, money, and measurement. The historical background of the methods, tools, and practices is taught imaginatively before modern methods are explained. Students will also be involved in a study of their community through the EfS curriculum. Indiana State Standards met include History – Students will describe how significant people, events, and developments have shaped their own community and region; compare their community to other communities in the region in other times and places; and use a variety of resources to gather information about the past. (3.1.1-3.1.8). Part of this standard will also be met in 4th grade. Civics and Government – Students will explain what it means to be citizens of their community, state, and nation; be able to identify the functions and major services provided by local governments; use a variety of resources to gather information about local, regional and national governments; and demonstrate understanding of democratic principles and practices. (3.2.1-3.2.7). Geography standards are met in 4th grade. Economics – Students will explain how people in the local community make choices about using goods, services, and community resources; how they engage in trade to satisfy their economic wants; how they use a variety of resources to gather and apply information about economic changes in the community; and how they compare costs and benefits in economic decision making. (3.4.1-3.4.9).

4th Grade

History and geography become formal morning lesson subjects in the fourth grade. The child's growing ability to regard with objectivity her/his environment is developed through the study of local geography. The child learns how to find the four points of the compass by observing sun and stars. They study and make maps of the classroom, the school, the neighborhood, the city, and state (with the curriculum adapted to the local geography and history of the area around their school). The goal of the geography curriculum is to engender an understanding of the interrelatedness of human activity and the local physical conditions of the earth. The fourth grade history curriculum examines the historical development and diversity of human society locally and throughout the state. The biographies of men and women who played a part in creating our local culture reiterate one of the predominant themes of fourth grade, which is the importance of human deeds. Indiana State Standards met include History - Students will trace the historical periods, places, people, events and movements that have led to the development of Indiana as a state. (4.1.1-4.1.18). Civics and Government Standards are met in 5th and 8th grades. Geography – Students will explain how the earth/sun relationships influence the climate of Indiana; identify the components of the earth's physical systems; describe the major physical and cultural characteristics of Indiana; give examples how people have adapted and modified their environment, past and present, and identify regions of Indiana. (4.3.1-

4.3.12). Economics – Students will study and compare the characteristics of Indiana’s changing economy in the past and present. (4.4.1-4.4.10).

5th Grade

History in fifth grade covers Ancient civilizations through Greek times and Geography covers American geography as related to vegetation, agriculture, culture and economics. Ancient history in the fifth grade starts with the "childhood" of civilized humanity in ancient India, Persia, the great cultures of Mesopotamia (the Chaldeans, the Assyrians, and the Babylonians) and Egypt. Students then move on to the study of ancient Greece and the birth of modern civilization. They delve into the foundations of philosophy, science, history, drama and art that were laid while Athens and Sparta fought for independence against the mighty Persian empire. Fifth graders also study the story of Alexander the Great, who conquered the ancient peoples previously studied, unifying, for a short time, this variety of cultures—a forecast of the study of the Roman Empire in Grade 6. The study of geography serves to complement the study of ancient cultures. While history leads the children deeper into themselves, geography takes them to the farthest reaches of the earth. The historical study of the ancient cultures includes an overview of the lands where these civilizations emerged. The teacher strives to give the children a sense for the great contrasts between different geographical regions, and geography awakens in the child a feeling of relatedness with fellow human beings living in all other parts of the world. In addition, the geography of the North American continent is studied. The student develops an understanding for the major mountain ranges and river systems, and how these landforms influence the rest of the continent. The teacher strives to give the child a sense for the contrasts between the different regions of North America in terms of topography, vegetation, animal life and human use of the land from ancient times to the present. US History is studied as well, from ancient, pre-Columbian times to the 1800s. Indiana State Standards met include History – Students will describe the historical movements that influenced the development of the United States from Pre-Columbian time up to 1800, with an emphasis on the American Revolution and the founding of the United States. (5.1.1-5.1.21). This standard is also met in 4th and 8th grades. Civics and Government – Students will identify main components and characteristics of United States government. They will explain and identify key ideas in government from the colonial and founding periods that continue to shape civic and political life. (5.2.1-5.2.10). This standard is also met in 6th and 8th grades. Geography – Students will describe the earth and sun relationships and use global grid systems. They will identify regions; describe physical and cultural characteristics; and locate states, capitals, and major physical features of the United States. They will also explain the changing interaction of people with their environment in regions of the United States and show how the United States is related geographically to the rest of the world. (5.3.1-5.3.12). Economics – Students will describe the productive resources and market relationships that influence the way people produce goods and services and earn a living in the United States in different historical periods. (5.4.1-5.4.8). This standard is also met in 3rd and 8th grades.

6th Grade

The History curriculum that governs much of the sixth grade takes as its theme Rome and medieval Christian Europe, as well as Moslem North Africa. The study of the Roman epoch begins with the mythical account of the travels of Aeneas and his founding of the city; it examines the evolution of Roman government, laws and rights through its successive rulers, the wars it waged, and its great achievements in technology and the arts; and it charts the events leading to its decline and the concomitant rise of Christianity and Islam. The Roman epoch epitomizes in an historical sense what the children are experiencing in their bodies. Of all the ancient peoples the Romans most strongly dominated the physical world. Their cities, roads, aqueducts, the Roman army, and their conquest of the Western world - all these accomplishments match a feeling of ego-confidence and a consciousness of personal power that the sixth grader has. Yet equally important for the children is the example of how the excesses of the Roman period led to the eradication of other cultures, the fall of the Roman empire, and the Dark Ages. The world enlarges for the sixth grade child in the study of Geography. Following the consideration of basic physical configurations as part of the Geology unit, the study of specific geographic regions extends to Europe and South America. The emphasis is on the interrelationship between the environment and traditional human cultures and ways of living. Indiana State Standards met include History – (6.1.1 – 6.1.24). Students will explore the key historic movements, events and figures that contributed to the development of modern Europe and America from early civilizations to modern times by examining religious institutions, trade and cultural interactions, political institutions and technological developments. This standard is also met in 7th and 8th grades. Civics and Government – Students will compare and contrast different forms of government in different historical periods with contemporary political structures of Europe and the Americas and examine the rights and responsibilities of individuals in different political systems. (6.2.1-6.2.7). This standard is also met in 7th and 8th grades. Geography – Students will identify the characteristics and climate of regions in Europe and the Americas and describe major physical features, countries and cities of Europe and the Western Hemisphere. (6.3.1-6.3.14). This standard is also met in 7th and 8th grade. Economics – Students will examine the influence of physical and cultural factors upon the economic systems of countries in Europe and the Americas. (6.4.1-6.4.10). This standard is also met in 7th and 8th grade as well as in 6th grade mathematics.

7th Grade

Seventh grade students study the history of the End of Middle Ages, the Age of Exploration, the Renaissance, as well as European and African Geography. The study of the Renaissance, Reformation, and the Age of Exploration reflects what the children are experiencing within themselves. The children learn biographies of great figures who went against the traditional, prevailing views of their day in their own search for truth, freedom, and self-expression. Through studying the lives of Galileo, Martin Luther, Christopher Columbus, Elizabeth I, and others, the children find reassurance that in their struggle to become themselves they also can contribute to the world. The Renaissance, which in Europe spans

the years from 1400 to 1700, was the beginning of a whole new way of looking at the world. Exact measurement and factual accuracy and new conceptualizations of how the world works became central to thought and culture. Individualism found its expression in artistic and intellectual achievements. The European continent was overtaken by great intellectual and political upheavals, as the old world gave way to a striving to discover a new world both within and around them. Indiana State Standards met include History – Students will examine the major events and figures that contributed to the development of Africa, Asia, and the Southwest Pacific from ancient civilization to modern times by examining religious institutions, trade and cultural interactions, political institutions and technical developments. (7.1.1 – 7.1.24) This standard is also covered in 5th grade as well as 8th grade. Civics and Government – Students will trace the development of different forms of government in different historical eras and compare various political structures in Africa, Asia, and the Southwest Pacific in terms of power, approach to human rights, and roles of citizens. (7.2.1-7.2.5). This standard is also covered in 5th grade as well as 8th grade. Geography – Students will explain how atmospheric and oceanic systems affect the seasons and climate. They will understand and use technology and grid systems to identify and locate places geographically. They will identify and categorize the major geographic characteristic and regions of Africa, Asia, and the Southwest Pacific. They will also name and locate major physical features, countries, and major cities and will use geographic skills and technology to examine geographic relationships within and between these regions and the rest of the world. (7.3.1-7.3.14). This standard is also covered in 8th grade. Economics – Students will examine the influence of physical and cultural factors upon the economic systems found in countries of Africa, Asia, and the Southwest Pacific. (7.4.1-7.4.9). This standard is also covered in 8th grade.

8th Grade

The social studies curriculum in the eighth grade includes the study of The Age of Revolutions; American History; The Twentieth Century; and Liberation Movements throughout the World. Geography studies include that of Asia and the United States. The curriculum's aim is to bring the accumulated image of world civilization up to the present day. Nothing characterizes the modern period better than the great revolutions—the industrial, political, and scientific revolutions that pulled down the old monarchical orders, and, in turn, gave rise to the struggles for individual freedoms and human rights. All these have had far-reaching cultural consequences, and it is important that the students consciously realize and appreciate this as they themselves are carried into the turmoil of adolescence. Indiana State Standards met in 8th grade include History – Students will examine the relationship and significance of themes, concepts, and movements in the development of US history, including review of key ideas related to the colonization of American and the Revolution and Founding Era. This will be followed by emphasis on social reform, national development and westward expansion, and the Civil War and Reconstruction Period. (8.1.1-8.1.31). Civics and Government – Students will explain the major principles, values, and institutions of constitutional government and citizenship, which are based on the founding documents of the United States and how three branches of

government share and check power within our federal system of government. (8.2.1-8.2.10). Geography – Students will identify the major geographic characteristics of the United States and its regions. They will name and locate the major physical features of the United States, as well as each of the state capitals and major cities and will use geographic skills and technology to examine the influence of geographic factors on national development. (8.3.1-8.3.11). Economics – Students will identify, describe, and evaluate the influence of economic factors on national development from the founding of the nation to the end of Reconstruction. (8.4.1-8.4.11).

Common Core Standards met in grades 6-8 in Social Studies and History includes all aspects of Reading including: Key Ideas and Details (RHSS 1-3); Craft and Structure (RHSS 4-6); Integration of Knowledge and Ideas (RHSS 4-9); Range of Reading and Levels of Text Complexity (RHSS 10).

The following is a more detailed example of our Curriculum Scope and Sequence, as well as an Alignment with Standards for Grade Four Math and Grade Seven Science:

Scope and Sequence

Grade Four Math

The first Math block of the fourth grade year begins with a thorough review of the arithmetic work that the class has done over the past three years: the four operations (all introduced in the First Grade), place value, manipulations with multiple-digit numbers, long division and long multiplication, and higher level algorithms. Review and expansion of these concepts will be the main work of the first Arithmetic block of the year, with the aim of solidifying the concepts for each student, while introducing new approaches to mastering the material. For example, place value, which was first introduced in the second grade year will be extended to include learning to the millions. Multiplication tables will be reviewed and practiced by searching for patterns in numbers through artistic projects, games, and codes, thereby capitalizing on the fourth grader's passion for finding and deciphering patterns and encryptions. New shortcuts to help with mental arithmetic (a daily practice in the life of a Green School student) will be developed, and word problems will enliven application of abstract concepts. This first block of the year will also introduce factors, as well as abundant and deficient numbers. Again, creative methods for the study of factors will bring the material to life, allowing the concept to "live" in the imagination of the child. In addition, a block of forty-five minutes will be set aside every morning for Math skills practice. This will include exercises in mental math and problem solving, as well as routine practice of grade-appropriate math concepts (using the Singapore Math Inc. curriculum).

The second and third Math blocks of the year will be taken up with the study of fractions. At this time, the ten-year-old child, having completed the transition from early childhood and not yet entered the transition to puberty is in what Waldorf pedagogy refers to as the "heart of childhood". While the child's spirited energy points in many ways to a new confidence, vigour, and desire for independence, there exists also an emerging sense of uncertainty as the experience of greater separation from his or her surroundings is felt. Indeed, there is something of a "fracturing" that occurs from the magical wholeness once experienced in early childhood. This is the perfect time then, to bring the study of fractions, first introduced by the over-arching Waldorf principal of whole to parts. Children are given a visual experience of fractions before forming mental concepts. This is done by way of different approaches, both manipulative and conceptual. Students may work visually by dividing balls of clay, for example, or cutting apples or pizza pies. They may bake using fractional measurements, or plan ways of dividing a gardening plot. Always the concepts are written about and illustrated in the child's main lesson book, with the purpose of recording a hands-on group experience in a very personal way. From the manipulative realm of everyday objects, children move into a more abstract understanding of fractions in their written form and how to use them in adding, subtracting, multiplying and dividing. They learn how to rewrite whole numbers as fractions, how to reduce and expand fractions, and how to change improper fractions into mixed fractions. Their understanding of fractions is deepened even further as they learn how fractions apply to concepts of time, money, distance and measurement. Once the students achieve a certain comfort level with working with fractions, decimal conversion is introduced. Fourth grade work in this area is meant to be preparatory in nature, looking toward a deepening of the subject in the fifth grade year.

The study of Geometry takes place throughout the year in connection with Form Drawing, a drawing exercise unique to Waldorf pedagogy. From first grade up to fifth grade, children create free-hand geometrical drawings through a series of straight and curved lines on paper, the shapes becoming more complex as the years go on.. The purpose of form drawing is the strengthening of the child's capacities in the realms of perseverance, concentration, patience and sureness, as well as an aid to improving handwriting and hand-eye coordination. Students meet their greatest challenge in this discipline in the fourth grade, as they are guided through a series of intricate knot and braid patterns, such as those found in Norse art (this practice compliments their Fourth Grade study of Norse Mythology). Additionally, their study of fractions is deepened through a series of form drawings that express fractions in visual form. Relying on their familiarity with freely drawn geometric shapes, fourth grade students now begin a more technical study of the subject using mathematical tools and terminology.

TGS Alignment with Standards Chart: 4th Grade Mathematics

Common Core Standards	The Green School Alignment
<p><u>4.OA. Operations and Algebraic Thinking</u></p> <ul style="list-style-type: none"> Use the four operations with whole numbers to solve problems. 	<p><u>4.OA. As stated. In addition:</u></p> <ul style="list-style-type: none"> Through curriculum stories, anecdotes and practical examples, review and daily practice, students show mastery of the four operations. This mastery includes the ability to do long division using estimation rounding of numbers, as well as the ability to solve long division problems containing remainders. (Divisors are double digit, while dividends are triple digit and higher.) Students are able to listen to complex (grade appropriate) word problems and mentally calculate the response to the question posed. When given story problems they can choose and write a formula representation of the mathematical aspects of the story. If given a formula representation, they are able to write another comparative representation of the problem.
<ul style="list-style-type: none"> Gain familiarity with factors and multiples 	<ul style="list-style-type: none"> Students will recognize that a whole number is a multiple of each of its factors through artistic exercises, movement, curriculum stories, and practical examples. Students learn that all whole numbers can be analyzed to see which smaller numbers divide into them exactly. This is a continuation of the understanding of going from 'whole to parts' which has its foundation in the

	<p>first grade year, and is a precursor to understanding fractions.</p> <ul style="list-style-type: none"> • Students distinguish between, and work with, prime and composite numbers . • In conjunction with the study of factors, students are introduced to the concepts of abundant and deficient numbers. • Students learn to find lowest common multiple or highest common factors.
<ul style="list-style-type: none"> • Generate and analyze patterns 	<ul style="list-style-type: none"> • In addition to working with written algebraic patterns and practical examples such as number lines, students will experience mathematical sequencing and patterns through music, movement, the natural world, and artistic work.
<p><u>4.NBT Number and Operations in Base 10</u></p> <ul style="list-style-type: none"> • Generalize place value understanding for multi-digit whole numbers. 	<p><u>4.NBT. As stated. In addition:</u></p> <ul style="list-style-type: none"> • Understanding of place value is strengthened in 4th grade, developing out of a foundation built in the second grade introduction. • Students use a variety of manipulatives, poetry, and stories to help them go from a concrete to an abstract understanding of place value, up to and including the millions column. • Students can write and read multi-digit numbers using base-ten numerals, number names, and expanded form from verbal dictations and written conversions. • Students can round multi-digit whole numbers to any place up to the millions column.
<ul style="list-style-type: none"> • Use place value understanding and properties of operations to perform multi-digit arithmetic. 	<ul style="list-style-type: none"> • Students will demonstrate an understanding of, and the ability to use, standard algorithms for multiplying and dividing multi-digit numbers, using an understanding of place value relationships to simplify computations

	<p>and to check results. This includes the ability to solve long division problems using estimation rounding of numbers.</p> <ul style="list-style-type: none"> • Students will use rectangular arrays and area models, sometimes in the form of manipulatives (stones, squares of paper, etc.) to help illustrate and explain their calculations.
<p><u>4.NF Number Operations – Fractions</u></p> <ul style="list-style-type: none"> • Extend understanding of fraction equivalence and ordering 	<p><u>4.NF As stated. In addition:</u></p> <ul style="list-style-type: none"> • Students understand the concept of a fraction of a number and of the numerical notational positions of numerator and denominator. • Students draw and use visual fraction models to understand fractions and fraction equivalence. They come to a better understanding through concrete and everyday practical examples (slicing cake, stacking boxes at the food pantry, etc.) • Students understand and work with mathematical symbols related to fractional equivalence and ordering: $>$, $=$, or $<$
<ul style="list-style-type: none"> • Build fractions from unit fractions by applying and extending previous understandings of operations on whole numbers 	<ul style="list-style-type: none"> • Students are introduced to, and experience a fraction as part of a whole. • Students demonstrate a working understanding of the four math processes while using fractions and mixed numbers. • Students are capable of reducing and expanding fractions thus understanding and using the “lowest common denominator” in working problems. • Students mentally solve word problems involving the addition and subtraction of fractions, and also use written equations, visual fraction models, and concrete manipulatives to represent the problem. • Students multiply fractions by whole

	<p>numbers, extending their understanding of the multiplication process.</p> <ul style="list-style-type: none"> • Students mentally solve word problems involving multiplication of a fraction by a whole number. They use written equations, visual fraction models, and concrete manipulatives to represent the problem.
<ul style="list-style-type: none"> • Understand decimal notation for fractions, and compare decimal fractions 	<ul style="list-style-type: none"> • Students understand the place value of decimals to three decimal places and how decimals relate to simple fractions. • Students recognize decimals as fractions: $.13 = 13/100$, and they learn to round decimal fractions: $.134 = 134/1000$ rounds to $13/100$
<p><u>4.MD Measurement and Data</u></p> <ul style="list-style-type: none"> • Solve problems involving measurement and conversion of measurements from a larger unit to a smaller unit. 	<p><u>4.MD As stated. In addition:</u></p> <ul style="list-style-type: none"> • Students were first introduced to measurement related to time and money in the second grade. In the third grade year, students extensively studied measurement related to volume, weight, mass, capacity, and length. Measurement and measurement conversion (using whole numbers, fractions and decimals) is continued and strengthened in the 4th grade. Students apply concepts practically in connection with the Local Geography block, when use linear measurement to create their own maps. Concepts are also practiced during the daily math skills unit. • Students are introduced to the concepts of area and perimeter in relation to Local Geography. They measure close and familiar objects and places surround them.
<ul style="list-style-type: none"> • Represent and interpret data. 	<ul style="list-style-type: none"> • Students collect, interpret and represent data and find averages in their science, history and physical geography classes.
<ul style="list-style-type: none"> • Geometric measurement: understand concepts of angle and measure angles. 	<ul style="list-style-type: none"> • Students measure and understand concepts of angles in connection with Local Geography block and mapmaking.
<p><u>4.G Geometry</u></p> <ul style="list-style-type: none"> • Draw and identify lines and angles, and classify shapes by properties of their 	<p><u>4.G As stated, in addition:</u></p> <ul style="list-style-type: none"> • Students draw and identify lines and angles, and classify shapes through

lines and angles.	freehand drawing exercises, known in Waldorf pedagogy as Form Drawing.
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Scope and Sequence

Grade Seven Science

The seventh grade signals a very important change in the development of the child, both physically and psychologically. The onset of puberty is experienced in combination with inner changes, as critical thinking blossoms and a desire to establish one's own individuality emerges. As with the previous grades, the seventh grade curriculum is designed to meet the students where they are developmentally, and focuses on themes of *exploration, discovery and transformation*, particularly as seen through the historical lens of the Renaissance. These three underlying themes run throughout the science curriculum as well, as students observe the *transformation* of inorganic substances in Chemistry, *discover* the laws of Physics through experienced and observed phenomenon in the study of Electricity and Mechanics, and *explore* the realms of their own bodies, as well as, the expanses of space in Health/Nutrition and Astronomy.

The subject of Inorganic Chemistry, as studied in the first science block of the year, offers students the opportunity for careful laboratory experimentation, while continuing to place the emphasis on detailed observation, and a phenomenological approach. Students begin the block with a study of combustion, followed by acids, salts, the lime cycle, and the universal solvent – water, witnessing first-hand how chemical reactions completely transform a substance. Through the process of quantifying and measuring, students begin to objectify their experience, refining their capacities for observation, for drawing conclusions, and forming judgments.

Continuing their exploration of the laws of Physics begun in the 6th grade year (Sound and Light), students undertake a study of Mechanics and Electricity/Magnetism in the second science block of the year. In Mechanics students learn about simple machines, and apply newly learned algebraic equations to the physical laws that underlie the science. Once again students engage in scientific observation and experimental procedure. They are involved in the set up and use of apparatus (e.g. volt meters, balances, etc) for experiments with data collection, and write reports which record materials used, procedures, hypotheses, observations, and conclusions. Students build models, draw schematics, and illustrate their observations with charts and diagrams.

In the Life Science block, students approach the topics of Health and Nutrition, through a study of basic Physiology. This topic, which will be more extensively studied in tandem with Anatomy in the 8th grade year, is the student's first introduction to the study of the living human body and its complex systems. The main systems of the body are explored: respiratory, circulatory, digestive, and reproductive. Health, nutrition, hygiene and sex education are brought so that these systems have meaning and relevance to the 7th grade students.

Finally, Astronomy is introduced as it relates to the study of the Renaissance, and to the student's own relationship to the horizon. The students compare the theories of Ptolemy, Copernicus, Kepler, Brahe and Galileo. They study the movement of the sun and stars; the earth's rotation; how calendars work; longitude and latitude; and the planets and moon. Outdoor direct observation is

always given priority, while inside the classroom students are taught with the aid of models, and enhance what they are taught through their own scientific research.

TGS Alignment with Standards Chart: 7th Grade Science

Science Content Core Standards	The Green School alignment
<p><u>Standard 1: Physical Science</u> <u>7.1.1 – 7.1.4</u></p> <ul style="list-style-type: none"> • Explain that energy cannot be created or destroyed but instead can only be changed from one form into another or transferred from place to place. 	<p><u>7.1.1 – 7.1.4</u> As stated. In addition:</p> <ul style="list-style-type: none"> • Students studied the physics of light and sound in sixth grade, and in 7th they gain a better understanding of electricity, in relation to sources of current, electrical appliances in relationship to flow of current, magnetic effects, electromagnets, and technical applications (electric ovens, boilers, irons, fuses). The topic of warmth is discussed in connection with conduction and the use of thermometers. • Concepts of energy will be studied in connection with 7th grade Chemistry. The study of combustion, for example may include observations of the burning qualities of different materials, descriptions of the power of a forest fire, the nature of biological respiration, and the chemistry of a burning candle.
<p><u>7.1.5 – 7.1.7</u></p> <ul style="list-style-type: none"> • Describe and investigate how forces between objects can act at a distance or by means of direct contact between objects. 	<ul style="list-style-type: none"> • The Physics main lesson block covers Electricity/ Magnetism (see above) and Mechanics. The topic of Mechanics covers levers in several variations: effort arm and load arm, digital balance, inclined plane, winch, pulleys, block and tackle, gears and linkages. Combinations of these ‘basic machines will be discussed and the aim is to arrive at the understanding of the means by which a weight-driven clock works. • Students will also consider the development of formulas for the lever and inclined plane, as well as the Golden Rule of mechanics (i.e. that gain in force is paid for by greater distance).

<p><u>Standard 2: Earth and Space Systems</u> <u>7.2.1 – 7.2.8</u></p> <ul style="list-style-type: none"> Describe how earth processes have shaped the topography of the earth and have made it possible to measure geological time. 	<ul style="list-style-type: none"> Geological features and time, as well as earth topography and processes were extensively studied in Geography main lesson blocks in the fourth (Local Geography) and fifth grades (Geography of North America), and are continued in 7th grade in connection with a World Geography block focusing on the continent of Africa. In Inorganic Chemistry, students study salts, including limestone and marble, origins and chemistry, natural formations, caves and cliffs, flora of chalk soils, and the lime cycle. A block on Astronomy is offered in connection with the 7th grade study of the Renaissance. Students learn about the other planets and major constellations as well as the relationship between the seasons, moon phases, the tides, and the earth's rotation.
<p><u>Standard 3: Life Science</u> <u>7.3.1 – 7.3.7</u></p> <ul style="list-style-type: none"> Understand the cellular structure of single-celled and multicellular organisms. 	<ul style="list-style-type: none"> An introduction to cellular biology is covered in the block on Health and Nutrition, and is more extensively studied in the 8th grade year in Human Anatomy and Physiology. In relation to health, students learn about basic cell components, cellular division, and reproduction, as well as how various organs serve the needs of cells for nutrient and oxygen delivery and waste removal.

Attachment 9

The Green School's Proposed Learning (Exit) Standards for Grades Five and Eight

Learning Standards for Grade Five

SUBJECT AREA	LEARNING STANDARDS By the end of fifth grade students will be able to:
LANGUAGE ARTS Reading	<ul style="list-style-type: none"> • read, analyze, and comprehend a wide variety of age appropriate genres, including biographies, informational texts, Ancient Greek and other Ancient Mythologies, literature and poetry • read age-appropriate texts confidently and independently • understand the difference between active and passive voice when reading a text • refer to, and accurately quote from texts when discussing main ideas and topics such as theme, character development, point of view, and setting in a story, drama or poem • refer to, and accurately quote from informational texts when explaining what the text says explicitly • compare and contrast within the same text, or genre (eg. Norse and Greek Mythology), looking for similar/differing themes, topics, opinions and perspectives • understand the basic structure of a text, including how chapters or scenes fit together • discover the meaning of unknown or multiple-meaning words or phrases by way of contextual clues
Writing and Grammar	<ul style="list-style-type: none"> • write descriptions in connection with social studies, nature studies, history, geography, mathematics, and language arts in main lesson book, and occasionally in report form • write clear, focused essays using multi-paragraph essay structure, incorporating introduction, supporting evidence and conclusion • develop and strengthen writing through planning, editing, and revising a written text, adding details to support the content, and reworking to make the meaning clear to a reader • explain the functions of prepositions, conjunctions and interjections • understand how verb tenses express time in language • distinguish between one's own opinion and reporting another person's opinion • conduct basic research using both print and digital sources of information • use reference materials including dictionaries, glossaries and thesauruses to ascertain correct spelling and meaning of words

	<ul style="list-style-type: none"> • integrate information from several texts when writing about a subject • identify and use complete sentences, correct parts of speech, subject-verb and pronoun-antecedent agreement, appropriate punctuation, capitalization and spelling • know and use all major parts of speech (nouns, verbs, adjectives, adverbs, interjections , the articles and conjunctions) • use common suffixes and prefixes • keyboarding skills • create a bibliography of sources
Speaking and Listening	<ul style="list-style-type: none"> • read aloud with accuracy and fluency, aware of punctuation and the difference between indirect and direct speech • take down a dictation on a known subject with reasonable accuracy • perform in a play and speak numerous lines individually • recite more complicated historical texts and poetry • summarize a text or presented material visually, quantitatively, and orally • engage effectively and meaningfully in collaborative discussions with various partners • present information, findings and supporting evidence in an organized, well-developed and appropriate manner • use a multimedia approach to the presentation of material by incorporating the visual arts, auditory content and digital media when appropriate
MATH Number Sense	<ul style="list-style-type: none"> • read, write and order numbers through the billions • round or estimate any whole number to a specific place • illustrate practical application or advantage for rounding • use notational symbols < > • recite times tables through 12, to the 12th multiple, forwards and backwards • recognize and know factors and multiples of 1 – 12 through 144 • know prime and square numbers through 50 • understand tenths and hundredths place of fractions • place common fractions in sequential order • know the value equivalencies of fractions • reduce and expand fractions using manipulatives and numerals • establish common denominators • change mixed numbers to improper fractions

	<ul style="list-style-type: none"> • change improper fractions to mixed numbers • identify decimal place value to tenths, hundredths, thousandths • order decimals • change fractions to decimals and back • change decimals to fractions and back
Computation and Procedures	<ul style="list-style-type: none"> • access all math facts previously memorized • use a variety of problem-solving strategies ('guess and check', work backwards, make a table or graph, make a model or drawing) • check one process by using the reverse process • select and use the appropriate method to solve a problem (mental math, estimation, paper and pencil) and choose the operation needed • add and subtract 4-digit numbers with regrouping • subtract from zeroes • solve 3-digit multiplication problems with 3-digit multiplier • solve long division problems with two-digit divisors with remainders • show clear alignment of long division problems on a page • add and subtract simple fractions and mixed numbers • regroup with fractions and mixed numbers • multiply and divide simple fractions and mixed numbers • solve problems involving all four processes with decimal fractions • mentally solve problems involving learned math facts and squares • use mental estimation
Patterns and Algebra	<ul style="list-style-type: none"> • interpret, extend and create number patterns • describe and construct a math pattern using previously learned math facts • explain how a change in one quantity can produce change in another • identify the rule when given pairs of numbers with a common function • find a missing number in an algorithm involving any of the four processes
Data Analysis, Statistics, and Probability	<ul style="list-style-type: none"> • collect data and construct displays (including graphs, tables, charts and diagrams) to represent it • analyze data displays by making comparisons, inferences, and predictions

	<ul style="list-style-type: none"> • define and calculate averages • use sampling to make probability decisions and to predict possible outcome
Geometry	<ul style="list-style-type: none"> • draw geometric shapes freehand • imaginatively divide a circle ($\frac{1}{4}$s, $\frac{1}{2}$s, 1s) • recognize different orientations of shapes in relationship to each other (symmetry and congruence) • calculate perimeter of any polygon using whole numbers and “like” fractions • calculate the area of any rectangle or triangle using standard and nonstandard measurement • apply the relationship of area/perimeter
Measurement	<ul style="list-style-type: none"> • use ruler and yardstick to measure classroom objects to the nearest $\frac{1}{4}$ inch • comprehend (and problem solve) simple standard length measurements, including conversions (inches, feet, yards, miles) • comprehend (and problem solve) simple standard weight measurements, including conversions (ounces, pounds, tons) • comprehend (and problem solve) simple standard capacity measurements, including conversions (ounces, cups, pints, quarts, gallons) • comprehend (and problem solve) simple standard units of time, including conversions (seconds, minutes, hours, days, months, years) • comprehend definitions of basic metric length, mass, and capacity terms (mm, cm, m, km; mg, g, kg; l, ml) • proficiently add and subtract time • use money in real life situations to compute change and describe equivalencies
SCIENCE The Nature of Science	<ul style="list-style-type: none"> • make predictions and formulate testable questions • work independently and collaboratively to carry out planned investigations and communicate results • make observations and measurements, collect and record data through hand-drawn illustrations, charts and written descriptions in nature studies, particularly those relating to Zoology (expanding on the 4th grade year) and Botany • compare the results of an investigation with the prediction
The History of Science	<ul style="list-style-type: none"> • understand facets of the history of science through stories and research on the lives of famous scientists
Life Sciences	<ul style="list-style-type: none"> • understand why environmental and climatic conditions impact the form and function of a plant

	<ul style="list-style-type: none"> • understand the movement and changes of the sun and moon in relation to a study on plant growth • understand basic conditions of plant life, different types of soil, and plant communities and adaptations • understand the evolution of lower plants to the higher plants (fungi to the grand variety of dicotyledons) , classification of plants, plant growth, and the relationship of plants and insects • understand plants from different environments (desert, tundra, rain forest, etc.) • map the world's distribution of plant growth • compare and contrast individual plants (a monocot, dicot (lily or rose) or a coch – mushroom) • grow plants, sprout seeds, take cuttings, watch flowers bloom and turn to seed • observe whole ecosystems, plant communities, individual plants, different species of plants, plant parts and environmental factors such as soil, sun, water, etc. • discuss physiology related to a survey of insects • demonstrate a working knowledge of major categories of plants, terminology of plant growth and the cycle of plant germination and growth. • understand terminologies of plant growth and plant parts; the cycle of plant germination and growth including perennial and annual plants. • imaginatively explore plant physiology, the breathing cycle, the major parts of a plant etc., and compared these to human physiology and human cycles.
Physical Sciences	<ul style="list-style-type: none"> • understand chemical/molecular concepts related to plant study including oxygen and carbon dioxide exchange between animal and plant kingdoms, the compounds involved in photosynthesis, and an introduction to sugars, carbohydrates and plant structure, etc. • describe, measure and understand weight and volume of various objects (as part of 4/5 Math blocks)
Earth Sciences	<ul style="list-style-type: none"> • locate watersheds in Indiana and the whole of North America (as part of geography block), with attention to a study of the water cycle as first introduced in 1st and 2nd grades • understand the relationship to watershed and the availability of moisture in varying geographical conditions • identify how major ocean currents influence weather patterns on this continent (as part of geography block) • understand the importance of water conservation (as part of the EfS curriculum)
SOCIAL SCIENCE History	<ul style="list-style-type: none"> • identify and understand Ancient Civilizations: Asian and Middle Eastern peoples, i.e. the culture and religions of Ancient India, China, Ancient Persia, Mesopotamia, Egypt

	<ul style="list-style-type: none"> • describe fundamental principles and purposes of democracy through an understanding of the origins of democracy in 6th century Athens (as part of the Greek History block) • understand structures and function of various types of modern government through a study of primitive governmental structures in place in ancient civilizations (ancient India, China, Persia, Mesopotamia and Egypt) • identify and understand the myths and history of Ancient Greece from Homer's time up to its encounter with oriental culture at the time of Alexander's campaigns • contrast how ancient life is affected by environment, climate, food, clothing, beliefs and religion • understand how our culture today is founded on the achievements of past ages
<p>Geography</p>	<ul style="list-style-type: none"> • discuss the regions of the United States and Canada, as described in terms of climate, terrain (major mountain ranges, rivers), states, capitals and cultural history (includes mention of customs and traditions, and teaches the regional history which contributed to the region's identity) • understand issues related to cooperation and conflict among the indigenous peoples, and between Native American Indian nations and new settlers - [as part of US Geography block] • describe how early settlers and Native American Indians adapted to and altered the physical environment • explore cultural differences among U.S. regions by way of historical contexts (e.g. yeoman history of New England colonialism with the plantation lifestyle of colonial Virginia requiring importation of forced slave labor) – [as part of US Geography block] • demonstrate the use of latitude and longitude, within the context of US geography • contrast life in different ecosystems (the coast, the desert, the plains, etc.) • discuss industrial growth and its effect on the environment • draw maps, and study maps, using an atlas, globe and wall maps • identify regional geography of the US and North America • trace the colonization, immigration, and settlement patterns of the American people from 1789 to the mid-1800s through a study of trade and transportation, as discussed in regional geography block
<p>FOREIGN LANGUAGE</p>	<ul style="list-style-type: none"> • practice reading one foreign language using a reader • respond to simple questions in a foreign language • retell small portions of a story in a foreign language • use and identify present, past, and future tense of verbs learned in a foreign language

	<ul style="list-style-type: none"> • identify different sentence structures in a foreign language
MUSIC	<ul style="list-style-type: none"> • sing a host of different songs (seasonal, traditional, etc.) • play the recorder • begin to play a string instrument • participate in group singing (sing in harmony) and playing • understand note lengths and time value in relation to the study of fractions
HANDWORK/TWO AND THREE DIMENSIONAL ART	<ul style="list-style-type: none"> • knit, purl and crochet • cross-stitch, and “neatly” sew by hand • draw complex forms of interweaving curved and straight lines that “braid together” • understand primary and complimentary color, both in quality and mood • illustrate main lesson books with increasing complexity of detail and form • use drawing techniques such as chiaroscuro • paint with watercolors • model with clay • begin carving with wood

Learning (Exit) Standards for Grade Eight

SUBJECT AREA	LEARNING STANDARD
	By the end of the eighth grade, students will be able to:
LANGUAGE ARTS Reading	<ul style="list-style-type: none"> • read, analyze, and comprehend a wide variety of age appropriate genres, including biographies, informational texts, and stories from the Age of Reason (e.g., The 30-Year War, King Louis XIV, Peter the Great, etc.) French and Industrial Revolutions, and American history • read extensively from a wide range of classical and modern literature and poetry, both self-selected and assigned • read extensively from a variety of non-fiction, for information and to discover new ideas, making effective use of reference materials to develop and support their own research projects and classroom work • demonstrate understanding of a variety of literature, including novels, poetry, short story, and drama, through oral, written, and artistic responses to the ideas and themes presented • glean the important ideas and details from a text, citing textual evidence to support analysis

	<ul style="list-style-type: none"> • summarize a text, taking into consideration issues of character development, dialogue, setting, and plot in literature, and supporting ideas, specific claims, and arguments in an informational text • retell or paraphrase a text, demonstrating the ability to be selective in the illustration of central ideas • identify recurring themes across works in print and media • compare and contrast differences among genres related to similar themes and topics • compare and contrast the experience of reading a work of literature to that of listening to an audio recording of it, and/or viewing a video or live version of it • discuss and understand the impact of authors' word choices, tone, content, and point of view and purpose in a text • relate new information to prior knowledge and experience • make connections to related topics and information • distinguish between significant, minor and irrelevant details in a text • apply reading strategies, such as using context clues, rereading, self-correcting, reading with others, predicting, questioning, and clarifying • demonstrate proficiency in reading skills and strategies across the curriculum and continue to develop vocabulary • distinguish between fact and opinion
<p>Writing and Grammar</p>	<ul style="list-style-type: none"> • write informative essays, reports or narrative procedures on topics drawn from the curriculum and reports based on their own reading and research • write persuasive essays by creating point-of-view pieces or responses to literary works • organize thoughts and information for writing and present ideas, opinions and arguments with clarity • develop drafts, analyze, revise and edit work as appropriate for audience and purpose • proofread their own writing or the writing of others, using dictionaries and other resources • write effectively for a variety of purposes and audiences • maintain a focus throughout a piece of writing and provide appropriate facts and details from a variety of sources to develop the subject • write a short story (fictional, biographical or autobiographical) and tell a story (fictional, biographical or autobiographical) • use literary elements with increasing facility and detail (e.g. dialogue, plot, point of view, setting, conflict, character development) • write for self-expression

	<ul style="list-style-type: none"> • analyze ideas through multiple vantage points and deeper layers of meaning • use appropriate conventions of written language, which include grammar, spelling, punctuation, language usage, capitalization, sentence structure and paragraphing
Speaking and Listening	<ul style="list-style-type: none"> • use appropriate grammar, word choice, and pacing during formal oral presentations • listen attentively and respectfully to others' points of view • use language that is clear, audible and appropriate for communicating to the intended audience • anticipate the listener's point of view and address this perspective in the presentation • present various types of oral presentations effectively (informational, persuasive, humorous, etc.) • recite poetry and literature selections with refined diction, pronunciation, enunciation and expression • perform a speaking role in a play, delivering lines clearly and audibly, from memory
MATH Number Sense	<ul style="list-style-type: none"> • represent the value of a number in a variety of forms (standard, expanded, exponential, scientific notation) • use and explain the relationships among fractions, decimals, and percents and make conversions • identify and plot positive and negative numbers • understand square numbers and roots • have a sense of ratio and percentage • set up a proportion
Computation and Procedures	<ul style="list-style-type: none"> • quickly and accurately access all math facts as a tool for problem solving • use a variety of problem-solving strategies ('guess and check', work backwards, make a table or graph, make a model or drawing) • select and use the appropriate method to solve a problem (mental math, estimation, paper and pencil, calculator) and choose the operation needed • solve a problem in more than one way • calculate scientific order of operations • add, subtract, multiply and divide whole numbers, decimals fractions, mixed numbers, and integers • calculate positive and negative integers using four processes • calculate fractions, decimals, and percents in real life situations • apply estimation

	<ul style="list-style-type: none"> • mentally solve problems involving all four processes, squares, estimation, sets, and distribution • work with proportion problems • work problems using formulas to solve problems • use number sense to justify the reasonableness of solutions to problems involving whole numbers, fractions, decimals, and percents • use calculator to add, subtract, multiply, and divide accurately
Patterns and Algebra	<ul style="list-style-type: none"> • interpret, extend, and create complex number patterns • describe and analyze patterns and relationships using tables, coordinate graphs, verbal rules, and standard algebraic notation • solve linear equations and formulas in problem-solving situations • solve and graph simple linear equations and ordered pairs of numbers • solve formulas as the basis of equations • apply equations with correct order of operations • work extensively with least common multiples and factors • understand distributive property of multiplication with respect to addition and multiplication
Data Analysis, Statistics, and Probability	<ul style="list-style-type: none"> • generate and organize data and report in a variety of ways (tables, charts, graphs) including pictograph, line, and circle, line plot, & scatter plot • analyze data as fractions, decimals, and percents • find averages • draw conclusions • predict outcomes as fractions, decimals, ratios, and percents
Geometry	<ul style="list-style-type: none"> • draw geometric constructions of more complex polygons • display deeper understanding of concepts of similarity and congruency in triangles, rectangles, etc. • compute ratio and proportion of polygons • compute area and perimeter of parallelograms, trapezoids, circles, and regular polygons • compute surface area of regular solids • compute volumes of regular polyhedrons (cylinders, pyramids, cones, spheres) • construct platonic solids: cube, tetrahedron, dodecahedron, octahedron, icosahedrons

	<ul style="list-style-type: none"> • measure and construct angles
Measurement	<ul style="list-style-type: none"> • select, estimate, and measure using appropriate units, tools, and formulas • estimate and measure using all standard and metric units • select and use appropriate units of measurement in problem-solving • problem solve using conversions of any units of measurement • use money in real life situations to compute change, describe equivalencies and determine percentages
SCIENCE Nature of Science - Investigation and Experimentation	<ul style="list-style-type: none"> • conduct scientific research with attention to textual evidence, the presentation of central ideas and conclusions • follow precisely multistep procedures when carrying out experimentation or measurement • integrate words and visual references (flowcharts, diagrams, models, graphs, tables, or illustrations) in presenting qualitative information • distinguish between facts and speculation in a scientific text • write clear and coherent informative/explanatory texts with attention to organization of ideas, and use of well-chosen facts, definitions, concrete details, quotations, or examples • incorporate headings, graphics and multimedia when appropriate in written texts • gather relevant information from multiple reliable and pertinent print and digital sources
Physical Sciences	<ul style="list-style-type: none"> • know and understand Newton's 3 Laws of Motion and his Law of Universal Attraction (gravity) • deepen understandings of simple machines (as introduced in 7th grade), by way of an understanding of the Law of the Lever, force and mechanical advantage • understand topics in Chemistry related to the model of the atom, the Periodic Table, Ionic bonding (compounds), Solutions and Solubility, Covalent Bonding (molecules), Polymers, Kinetic Theory, and Reactions, building on what they learned about Chemistry in the 7th grade • write chemical equations and learn basic organic chemistry in the context of: <ul style="list-style-type: none"> - plant structure and chemical processes - cycles of elements (e.g. calcium, carbon, and nitrogen cycles) - tests for starch, sugars, proteins and fats - chemical equations of sugars, starches and fats - solubility of elements, molecules and compounds • understand the Periodic Table in reference to atomic number, mass number, isotopes, and average atomic mass, chemical families, metals, non-metals, metalloids, gaseous elements, and the noble gases. • understand periodic trends in thermal and electrical conductivity • understand volume displacement, buoyancy, density, and surface tension • deepen understandings of acoustics, magnetism, heat, optics and electricity

Life Science	<ul style="list-style-type: none"> • understand the elements hydrogen, oxygen, and nitrogen as building blocks of plant and animal tissue: cellulose, glucose, carbohydrate, protein, etc. • understand, observe, and illustrate the human skeletal and muscular systems • understand, observe, and illustrate the inner workings of the human eye and ear • understand, observe, and illustrate the human nervous and reproductive systems
Earth Science	<ul style="list-style-type: none"> • follow-up the study of Newton's Universal Law of Gravity with discussion of its astronomic applications • understand the role of gravity in the evolution of the stars, and how it holds together star systems and galaxies • calculate planetary distances and orbital speeds (Kepler's Laws), convert distances into light-minutes and light-years, and calculate distances to stars and galaxies • understand and illustrate the layers of atmosphere above the earth • map the different winds (prevailing, westerlies, trade, easterlies, doldrums) on a globe • diagram the water cycle in a meadow or near the ocean • understand and illustrate the different cloud types • understand convection in relation to meteorology (atmospherics and climatology) • make and experiment with weather instruments (wind vane, barometer) • keep daily weather journal, noting speed and direction of wind; types and heights of clouds; temperature; precipitation; observation of the sky at the same time of day
SOCIAL SCIENCE History	<ul style="list-style-type: none"> • understand the early colonial period and how sentiments and lifestyle set the stage for the American Revolution, e.g. the religious mood of the revivalist Great Awakening • understand how philosophers in Europe such as Locke, Voltaire, and Rousseau had propounded many of the ideas that would be incorporated into the philosophy of government professed in the Declaration of Independence • understand that the French Revolution of 1789 was furthered by the success of the American Revolution • understand the unique blending of values and procedures underlying the framing of the Constitution • build upon knowledge of the Reformation to address the revolutions of government, laws and rights. They are presented the additional documents (English Bill of Rights, Mayflower Compact, etc) which extend ideals of independence (earlier afforded only to aristocrats) to all people. • introduce a history of government, learning how framers balanced powers and duties among 3 branches. • understand issues, proposals, debates, and documents influencing the development of the US government up to the present day; these documents include the Constitution, Bill of

	<p>Rights, and later Amendments</p> <ul style="list-style-type: none"> • understand the North-South geo-political and industrial division effecting both the American Revolution and Civil War • recount stories and biographies of the Ages of Enlightenment and Revolution. Candidate biographies include George Washington, Thomas Jefferson, John Quincy Adams, Lafayette, Benjamin Franklin, Dolly Madison, etc. • understand American history through its politics, arts and culture • understand how industrialization contributed to divergent cultures of North and South. Westward expansion on the frontier led to another emerging population. The influx of immigrants brought ethnic, cultural and religious differences which needed reconciliation in the shaping of the nation • follow the lives of the immigrant populations, the Irish, Chinese, Scandinavians, Polish, etc • understand the lives and ideas of the Transcendentalist movement and their support of abolition. During this period of American History students also learn of the early public education endeavors • analyze the multiple causes, key events, and complex consequences of the Civil War, gaining a deeper understand through biographies of Abraham Lincoln, Frederick Douglas, Sojourner Truth, Harriet Tubman, Robert E. Lee, Ulysses S. Grant, Jefferson Davis, Bismarck, etc • analyze the character and lasting consequences of the Reconstruction • analyze the transformation of the American economy and the changing social and political conditions in the United States in response to the Industrial Revolution, gaining a deeper understanding through biographies of reformer, industrialists and scientists of the later 19th century, including Susan B. Anthony, Andrew Carnegie, John D. Rockefeller, Thomas Edison, Nicolas Tesla, Alexander Graham Bell, Orville and Wilbur Wright, Elijah McCoy, George Washington Carver, etc.
World Geography	<ul style="list-style-type: none"> • understand economic impact of geography on civilization, and develop a geographical understanding of Asia with emphasis on the following: <ul style="list-style-type: none"> - Countries, capitals, major mountains, bodies of water -Seasonal changes -Biotic zones - Wind and water currents - Meridians and parallels of latitude -Specific land formations -Comparisons and contrasts of various climates -Comparisons and contrasts of various vegetation -Free hand drawing of continents and bodies of water.
FOREIGN LANGUAGE	<ul style="list-style-type: none"> • speak more freely about self and environment in a foreign language • understand grammatical terminology in a foreign language • have a good imaginative picture of the country where a foreign language is spoken • understand and use cases in a foreign language

	<ul style="list-style-type: none"> • grasp sentence structure in a foreign language • express clearly in the range of everyday life in a foreign language
MUSIC	<ul style="list-style-type: none"> • sing songs in 2 to 4 voices, a-capella, songs with more developed themes (death, criticizing contemporary life, humor, etc.) and stronger rhythms • help to compose music for class plays • understand theory of melody • read music • reference biographies of various composers • play a variety of instruments (string, wind and percussion) • rhythmically improvise • understand how different motifs in music belong to different epochs of history
HANDWORK/TWO AND THREE DIMENSIONAL ART	<ul style="list-style-type: none"> • use basic woodworking tools (saws, chisels, rasps and files) • use a sewing machine • make everyday clothing and costumes • build a clay baking oven • build a teepee • create a watercolor veil painting • model geographic forms (mountain ranges, etc.) as part of geography lessons • draw in perspective • use ink brush and pen for drawing • sculpt figures with dramatic gestures • have a basic understanding of the history of art

Attachment 10

School Calendar and Schedule

School Calendar and Schedule

Overview

The Founders' Group has chosen a flexible school calendar for TGS. We believe the flexible calendar reflects the needs of our educational program for a number of reasons. First, taking fewer weeks off in the summer creates less loss of learning over the summer break. The longer breaks during the school year give teachers and students time to recharge. It also gives families more quality time to be together during the school year. Having three weeks off at winter break goes along with our philosophy of environmental sustainability since our building will use less heating. Having less time off in the summer helps our school garden, as students will be in school for planting as well as harvesting the vegetables. The Bloomington Project School also uses the flexible school calendar.

We plan to begin school at 8:30am and dismiss at 3:30 pm, except for Thursday when we have early dismissal. Students will be dismissed on Thursdays at 1:30pm to allow for faculty and staff to meet and discuss pedagogical issues, work on staff development, and participate in Critical Friends Groups.

School Day Structure

8:30 - 10:30 Morning Lesson
10:30 - 11:00 Bodily/Kinesthetic/Transition Activity
11:00 - 11:45 Class
11:45 - 12:30 Primary grades' lunch/Class for intermediate and middle grades
12:30 - 1:15 Intermediate/Middle grades' lunch/Class for primary grades
1:15 - 2:00 Class
2:00 - 2:45 Class
2:45 - 3:30 Class
Early release day - 1:30 (with day care provided): Thursdays

Meeting Instructional Time Requirements for the State of Indiana

Minimum required time for elementary students is 5 hours/day or 25 hours/week. TGS exceeds the minimum instructional time for the state of Indiana. Students receive instructional time 29.25 hours per week.

State Minimum

5 hours per day x 180 days = 900 hours per year minimum
1 week = 25 hours
36 weeks = 900 hours

TGS Total Instructional Time

4 days @ 6.25 hours = 25
1 day @ 4.25 hours
1 week = 29.25 hours
36 weeks = 1053 hours

Instructional time per class per week

Class Name	Number of minutes per week
Morning Lesson (Math, Language Arts, Science, Social Studies)	600
Skills Class – Math	225
Skills Class – Language Arts	225
Practical Arts	90
Fine Arts	90
EfS	180
Physical Education	45

Note: Given the very integrated nature of our curriculum and pedagogy, the morning lesson weaves Language arts instruction deeply into all subject areas. In addition, all practical arts and fine arts integrate academic subjects.

Kindergarten, First, and Second Grade

Students are taught 9 blocks throughout the school year, each lasting 4 weeks. The breakdown of the blocks is as follows:

- 4 math blocks @ 4 weeks per block, 600 minutes per week = 9,600 minutes per year
- 4 language arts blocks @ 4 weeks per block, 600 minutes per week = 9,600 minutes per year
- 1 Science/Social Studies block @ 4 weeks per block, 600 minutes per week = 2,400 minutes per year

Third, fourth, and fifth grade students are taught 10 blocks throughout the school year, each block lasting 3-4 weeks. The breakdown of the blocks is as follows:

Third Grade:

- 4 math blocks @ 3.6 weeks per block, 600 minutes per week = 8,640 minutes per year
- 4 language arts blocks @ 3.6 weeks per block, 600 minutes per week = 8,640 minutes per year
- 2 Science/Social Studies blocks @ 3.6 weeks per block, 600 minutes per week = 4,320 minutes per year

Fourth Grade

- 3 math blocks @ 3.6 weeks per block, 600 minutes per week = 6,480 minutes per year
- 3 language arts blocks @ 3.6 weeks per block, 600 minutes per week = 6,480 minutes per year
- 2 science blocks @ 3.6 weeks per block, 600 minutes per week = 4,320 minutes per year
- 2 social studies blocks @ 4 weeks per block, 600 minutes per week = 4,320 minutes per year

Fifth Grade

- 3 science blocks @ 3.6 weeks per block, 600 minutes per week = 6,480 minutes per year
- 3 language arts blocks @ 3.6 weeks per block, 600 minutes per week = 6,480 minutes per year
- 2 social studies blocks @ 3.6 weeks per block, 600 minutes per week = 4,320 minutes per year
- 2 math blocks @ 3.6 weeks per block, 600 minutes per week = 4,320 minutes per year

Sixth grade students are taught 11 blocks per year, each block lasting 3-4 weeks. The breakdown of the blocks is as follows:

Sixth Grade

- 3 science blocks @ 3.25 weeks per block, 600 minutes per week = 5,850 minutes per year

- 3 math blocks @ 3.25 weeks per block, 600 minutes per week = 5,850 minutes per year
- 3 social studies blocks @ 3.25 weeks per block, 600 minutes per week = 5,850 minutes per year
- 2 language arts blocks @ 3.25 weeks per block, 600 minutes per week = 3,900 minutes per year

Seventh and eighth grade students are taught 12 blocks per year, each block lasting 3 weeks. The breakdown of the blocks is as follows:

Seventh and Eighth Grade

- 4 science blocks @ 3 weeks per block, 600 minutes per week = 7,200 minutes per year
- 4 social studies blocks @ 3 weeks per block, 600 minutes per week = 7,200 minutes per year
- 2 language arts blocks @ 3 weeks per block, 600 minutes per week = 3,600 minutes per year
- 2 math blocks @ 3 weeks per block, 600 minutes per week = 3,600 minutes per year

Note: Beginning in fourth grade, a serious study of social studies begins. Due to the way in which the subject is taught, language arts is deeply woven into every social studies block. Thus the minutes devoted to social studies are also language arts minutes.

The Green School 2015-2016 Academic Calendar

Dates on this calendar may be changed if necessary to schedule makeup days (for days lost to emergency school closings) in order to meet the minimum number of instructional days required by state law.

Quarterly Schedules

First Term	Wednesday, July 29, 2015 through Friday, October 9, 2015
Children Report	Monday, August 3, 2015
Second Term	Monday, October 26, 2015 through Friday, December 18, 2015
Third Term	Monday, January 11, 2016 through Friday, March 19, 2016
Fourth Term	Monday, April 12, 2016 through Friday, June 18, 2016
Last Day	Friday, June 18, 2016

Professional Activity Days and Holidays

Teacher Meetings and Work Days	Wednesday, July 29, 2015 through Friday, July 31, 2015
Labor Day	Monday, September 7, 2015 (NO SCHOOL)
Conferences	Wednesday, September 16, 2015
Fall Break	Close of school Friday, October 9, 2015 and reopen Monday, October 26, 2015 (NO SCHOOL)
Thanksgiving Break	Wednesday, November 25, 2015 through Friday, November 27
Conference Day	Wednesday, December 16, 2015 (NO SCHOOL)
Winter Break	Close of school Friday, December 18, 2015 and reopen Monday, January 11, 2016 (NO SCHOOL)
Martin Luther King Day	Monday, January 18, 2016 (NO SCHOOL)
President's Day	Monday, February 15, 2016 (NO SCHOOL)
Conference Day	Wednesday, March 15, 2016 (NO SCHOOL)
Spring Break	Close of school Friday, March 19, 2016 and reopen Monday, April 13, 2016 (NO SCHOOL)
Reflection Conference	Wednesday, May 19, 2016 (NO SCHOOL)

Friday, May 21, 2016

Makeup day for school closing or day without student or teacher

Attendance

Memorial Day

Monday, May 24, 2016 (NO SCHOOL)

Last Day

Friday, June 18, 2016

Attachment 11

The Green School Enrollment Policy

Open Enrollment Dates: December 1-March 1

Public Lottery Date: Wednesday preceding spring break annually

Eligible Students:

All kindergarten (students must turn 5 by July 31) through 5th grade students currently living in the state of Indiana are eligible to apply, enroll, and attend The Green School. There are no other admissions requirements to attend the school.

The Enrollment, Lottery, and Notification Process:

Application Eligibility and Process:

The parent or legal guardian of any eligible student must completely fill out The Green School Student Application. After the receipt of any application, the student's name will be added to the appropriate grade level list. The Green School will accept applications for open enrollment until 5:00 on March 1 annually.

The Lottery:

The Green School will place the name of each student that applied on an index card (each student has his/her own card). Each grade level will have a different color to avoid confusion. Grade level and sibling information is included on opposite corners of the student card. The process for the lottery was developed to ensure a fair and equitable chance for all students. Randomizer.org is utilized to determine the order of the grade levels to be drawn. Several process observers are stationed throughout the room to confirm that the process has accuracy and integrity. Student cards are drawn by grade in the order established by Randomizer.org. As a name is drawn, if there is a sibling, the sibling name will be placed in a class or on the waiting list respectively, as well. Once all spots are filled in a grade level, the remaining cards are drawn to determine the order of the waiting list.

Sibling Preference:

The only admission preference at The Green School is for families with more than one child applying to the school. If a student's sibling is already attending The Green School, that student will be automatically enrolled if there are any open spots at the student's grade level.

Notification:

After the public lottery, The Green School will notify all families and students who have been selected for spots, as well as those who are on the waiting list for any grade level. This notification will be done within 3 business days of the lottery. Each family will have two weeks from notification to accept their spot at The Green School. If a family does not accept the spot within that week, their spot will be offered to the first student on the waiting list for that grade level. If a student's name is not selected, s/he is notified where s/he is on the waiting list.

Once students have accepted, The Green School utilizes a full enrollment packet and process that will follow all charter school laws. The school is open to any family in Indiana. In accordance with federal and state laws, no student will be denied admission to The Green

School based on race, gender, national origin, sexual orientation, aptitude, disability, religion, or athletic ability. There will be no achievement or aptitude data used at any point in our enrollment process. If a student applies to the school after the open enrollment period, and there is an open spot at their grade level, that student will be automatically admitted to the school.

Withdrawal Procedure:

When a student withdraws, the student's cumulative file is sent to the receiving school. If the student wishes to return to TGS, he/she must apply like any other new student without any preference.

Sabbatical Policy:

If a student's family is leaving for up to one year, that student will have preferences in the next school year's lottery. He/she will gain priority after any sibling currently on the waiting list for that slot. The student can be placed before the lottery if there is an opening in the appropriate grade.

Attachment 12

Expanded Description of TGS Discipline Policy

Our teachers and staff are not only responsible for the students in their classroom but for every child in the school. Our discipline policy is intended to encourage respect for everyone and everything (including self respect), foster an atmosphere that promotes student success and reinforce the contributions of each person to the school and larger community.

Student behavior will be monitored in a variety of ways by classroom teachers, students and other adults in the school community who have been assigned to assist with student behavior. These monitoring tools include:

- **Informal observations-** Written observations are recorded by teachers and shared with families as needed.
- **Self-monitoring-** Students will be given opportunities to monitor their own behavior. This could be composed of a journal with self-reflections and self record-keeping.
- **Formal behavior, observation, and documentation-** Personalized behavior plans are created by teachers, students, and families for behavioral monitoring and are completed by teachers or other staff members observing a child.
- **Teacher collaboration** – A portion of Thursday afternoons (staff meetings) will be used to meet and discuss children’s learning and behavior in the form of a Child Study. (See appendix __ for more details on Child Study)

When a student does not meet behavioral expectations we employ a series of positive interventions (listed below) intended to encourage student reflection on his or her actions. The focus of this reflection is on respect for self, others and the surroundings. This intervention process is flexible to meet the individual needs of students and allows teachers to use their professional discretion in response to family contact and which steps to take. The Green School does distinguish between negative behaviors that affect the learning environment for one’s self and others, and that endanger the child, others or the school. Unless the behavior is more serious requiring immediate action that be taken, students will start at the first step and move through appropriate steps as determined by the teacher and or designated staff.

Step 1: Student Self-Reflection- Either alone or with another adult, the student is given time to reflect on the choices he/she made. The process looks different for each child, depending on age and developmental level. For example, a younger child may need assistance to reflect upon his or her actions, while older children would do this step on their own. This time could serve as a “cool down” period. This is often accomplished by drawing a picture of actions that would have resulted in a positive rather than a negative outcome.

Step 2: Peer Intervention- Students are expected to work with their peers to problem-solve. Students are taught to work through their problems through a series of steps. This step would only be used when the behavior involves a student-to-student interaction. With younger students this step would work in conjunction with step 3 in order to be more developmentally appropriate.

Step 3: Adult Intervention- an adult is present to mediate to help a child process his or her behavior. An action plan is designed at this time.

Step 4: School Community Intervention- certain behaviors may need to be brought to the classroom or a small group of peers by a responsible adult. During this time, students have the opportunity to discuss expectations. This step will only apply to older students based on developmental readiness.

Step 5: Educational Director Intervention- The Educational Director collaborates with the teacher and student to resolve the situation.

Step 6: Family Intervention- Challenging behaviors are shared with families in order to create a larger support group for a child's success.

For students exhibiting chronic behavioral needs the previous steps may not be sufficient. A personalized behavior plan may be needed to meet the needs of some students. The development of such a plan will involve input from a group of teachers, school leaders and family members. The resulting plan will target behaviors and actions to be used in school to help the child achieve success.

Each child and each discipline issue will be looked at individually. Each resource and action will be exhausted before a child is considered for suspension or expulsion. Since our primary concern is the safety of students, if all strategies and resources have been exhausted and the learning community is still put at risk by a student, TGS will work with the family to find a different educational option for their child. The parent and student handbook will outline specific procedures for suspensions, expulsions and other disciplinary actions.

TGS shall define suspensions and expulsions in accordance with Indiana Code 20-8.1-5-16.

A teacher may temporarily suspend a student from class. A teacher may extend the class suspension for a maximum of two consecutive class meetings. Suspension for more than two consecutive class meetings requires action by the Educational Director or Assistant Director.

In accordance with Indiana Code 20-33-8-13.5, our family handbook will set forth a detailed anti-bullying policy including provisions concerning education, parental involvement, reporting, investigation, and intervention. In addition, it will describe in detail the expulsion process including the rights and responsibilities of students, guardians, and school personnel.

In accordance with Indiana Code 20-33-8-15, a student may be suspended or expelled for engaging in unlawful activity on or off school grounds if: (1) the unlawful activity may reasonably be considered to be an interference with school purposes or an educational function; or (2) the student's removal is necessary to restore order to protect persons on school property.

As defined in Indiana Code 20-33-8-16, a student who is identified as bringing a firearm or destructive device to school or on school property, or is in possession of a firearm or destructive device on school property, must be expelled for at least one (1) calendar year, with the return of the student to be at the beginning of the first school semester after the end of one (1) year period. The Educational Director, in collaboration with the Board, may, on a case by case basis, modify the period of expulsion for a student who is expelled under this section. A student with disabilities (as defined in IC 20-35-7-7) who possesses a firearm on school property will be subject to procedural safeguards under 20 U.S.C. 1415.

In regards to suspension and expulsion, students with disabilities will be treated in accordance with guidelines as outlined in IDEA and will be in line with a child's IEP.

TGS will use ongoing communication and surveys in order to evaluate satisfaction levels of families with the various aspects of our discipline program. Examples are not limited to but may include: parent-school discussion groups, communication folders, phone calls and conferences. Once surveys and other feedback are gathered, we will review the information and share these results with the entire school community- families, board, teachers and staff. We will then evaluate the results and create an action plan as needed.

Our completed discipline plan will be included in the Student/Parent Handbook. This handbook will be given to each family at the time of registration. Additional copies will be available and on display at all times in the school office and on the TGS website.

Attachment 13

Evidence of Community Demand, Engagement, and Support

Contains:

The Green School Process Approach to Community Building

Organization and partner letters of intent

Letters of support

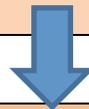
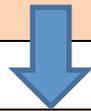
Special meetings with community leaders

Community Interest Survey Results

Community Outreach Series Plan

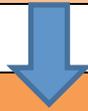
The TGS Process Approach to Community Building

Process Phase	Process Tasks	Implementation Methods	Timeframe
Phase 1: Formation Generate Public Awareness, Form and Build Organizational Capacity	<ul style="list-style-type: none"> Develop public and community awareness of TGS Communicate and educate community members about school platform Develop partnerships specific to necessary services for school: building, cafeteria, EfS Program Develop and engage marketing plan to promote community awareness Build community awareness of school's mission 	<ul style="list-style-type: none"> Initial call-out meeting for interested parents and community members Develop internet presence with website development, social media, and email Make regular announcements and updates about work and events via social media, radio, and newspaper Host information dissemination meetings where parents provide feedback on school model for founders group Table at local farmers markets to disseminate information and gather feedback Disseminate community interest survey Meet with area superintendents of public school systems Radio and newspaper interviews Launch Community Outreach Series 	Inception of Founders Group (January 2012)- official charter status



Phase 2: Form, Build Capacity, and Engage	<ul style="list-style-type: none"> Build community awareness of school's mission and location Build capacity through grant writing Build capacity through continued and increased student recruitment efforts Build capacity through staff and faculty hiring Engage community with outreach and marketing events from strategic 	<ul style="list-style-type: none"> Employ implementation positions Provide professional development for Faculty and Staff Write planning grant and any other mini-grants that surface for EfS or other school programming Ongoing design and implementation meetings with key partners 	Implementation year (August 2013- July 2014)
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	<ul style="list-style-type: none"> marketing plans • Prepare EfS partnerships: food service; service-learning; guest teachers • Design EfS topics for upcoming year and pursue additional partnerships to complete programming needs • Recruit parent and community volunteers • Write and distribute staff and family handbooks • Begin plans for first festival , garden ground breaking • Organize first year teacher-family home visits 	<ul style="list-style-type: none"> • Design newsletters to be distributed quarterly to parents and partners • Recruit students with outreach events and • Schedule specific EfS topics; co-design curriculum with teachers • Recruit EfS guest teachers where applicable • Coordinate parent volunteers for first PVN; design outreach events and first seasonal festival • Garden ground breaking event for staff, faculty, and families 	
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<p>Phase 3: Maintain, Evaluate, and Improve Community Building Efforts</p>	<ul style="list-style-type: none"> • Assess successes and challenges thus far • Parent Volunteer Network formally begins • Recruit and organize parent volunteers for planned events and class/garden help • Evaluate efforts from Phases 1 & 2 with verbal and/or survey feedback from parents, students, staff , and other stakeholders • Respond to feedback with appropriate revisions • Initiate parent-teacher conferences beginning with home visits • Initiate fundraising efforts through PVN and Board of Directors 	<ul style="list-style-type: none"> • Gather parent and community feedback through COC and LSE communications through newsletter, email, and coffee hours • Recruit and implement Parent Volunteer Network • Plan and engage parents in festivals, home visits, and conferences • Engage parents in classroom or garden volunteer work • Implement coffee hours 	<p>Opening: (August 2014 and ongoing)</p>
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Organization and Partner Letters of Intent



INDIANA UNIVERSITY

CENTER FOR INNOVATIVE TEACHING AND LEARNING

Office of the Vice Provost for Undergraduate Education /
University Information Technology Services
Bloomington

Re: Request for Proposal for Green Meadows Charter School
Ball State University Office of Charter Schools

To the Proposal Evaluators,

This letter confirms that the Service-Learning Program at Indiana University will work in partnership with Green Meadows Charter School (GMCS) by facilitating partnerships between Indiana University faculty and students and GMCS. Details for these collaborative partnerships will be established over the course of the school's implementation period, and will begin during the 2013-2014 academic year.

The Service-Learning Program at Indiana University develops campus-community partnerships for Indiana University students and faculty to learn in partnership with the community and to develop competencies that promote the advancement of a socially responsible citizenry. By combining academic theory with practical, real-life experience, service-learning helps students gain a broader and deeper understanding of course content and an enhanced sense of civic engagement. At the same time, service-learning provides an opportunity for community partners such as GMCS to tap into the skills and talents of students to help them build their capacity and pursue their mission. The Service-Learning Program at Indiana University works with over 100 nonprofit and public sector agencies in Bloomington and Monroe County and more than 3,000 students took a service-learning course at IU last year. We see great opportunities to connect IU service-learning courses to GMCS through a variety of disciplines. Moreover, GMCS maintains a commitment to provide service learning opportunities to their students. We are confident that this alignment of missions between the IU Service-Learning Program and the new charter school will be mutually-beneficial and plentiful.

There are no fees associated with our partnership with the GMCS.

Please contact Andrew Libby if you have any questions.

Sincerely,

Andrew Libby

Community Engagement Coordinator, Service-Learning Program

Center for Innovative Teaching and Learning

Indiana University, Bloomington



The Center for Sustainable Living

A 501 (c) (3) Organization

Re: Request for Proposal for Green Meadows Charter School
Ball State University Office of Charter Schools

To the Proposal Evaluators,

The Center for Sustainable Living (CSL) is proud to enter a partnership with Green Meadows Charter School (GMCS) if it is approved by the Ball State University Office of Charter Schools. We value partnerships which serve to educate the community in sound practices for environmental sustainability and community social justice. Since the school's goals fit with our own goals for this type of education, the partnership will be a natural step for the growth of our organization.

CSL is a non-profit 501 (c) (3) organization which exists to educate the public about true sustainability especially in regard to resource use and its impact on the environment. It is our mission to make available information, services, projects and networking opportunities for those interested in exploring ecologically sustainable ways of thinking, living and interacting in our community. We also serve as an umbrella organization for new initiatives and grassroots organizations seeking non-profit status. Some of our current projects and organizations include: Bloomington Transportation Options for People (BTOP), Southern Indiana Renewable Energy Network (SIREN), Community Bicycle Project, Habitat Stewards, Discardia, and Local First Indiana. Each of the projects and organizations under our umbrella are a special resource and each one serves to fulfill CSL's overall goals which are:

- to integrate human settlements and activities harmoniously into the natural world
- to provide services, information, tools and networking opportunities for those interested in sustainable living
- to develop projects and programs that promote more sustainable ways of living
- to work with and support other groups with similar purposes
- to sponsor public events where community members may meet to exchange ideas, suggest solutions, and develop strategies to promote sustainable living.

CSL offers many avenues for sustainability education through our various projects described above. It is our intention to work in conjunction with GMCS staff to design education for sustainability curriculum and block lessons which incorporate our various projects into the school's curriculum. The lessons will foster practical experience and application of social, scientific, mathematical, and reading concepts to real world activities. Possible examples include educating middle school children about the social and economic impact of local consumption with our Local First advocates, bringing Habitat Stewards volunteers to the school to teach students and families the biological and environmental value of native plant gardens, or teaching bicycle repair in conjunction with physics and math lessons via the Community Bicycle Project.

Our interest in partnership with the school allows our organization to make an important step in educating the public by reaching a larger population within the Bloomington community along with serving to educate youth. We value the education of youth as especially important to true sustainability since young people are the ones who will inherit the social and environmental problems we are only beginning to tackle. We believe it will be important for our youth to have a strong foundation in sustainability education in order to go forward with a healthy outlook on some difficult social and ecological issues. This partnership is a step in this direction. In return, our organization will participate in the design of this vital form of education to students and families at GMCS. We will also provide practical hands-on support in coordinating lessons and extra-curricular activities as deemed appropriate by GMCS staff and the CSL board. In addition,

we are confident that current relationships between our board members and community engagement coordinator for the school, Brandi Smith, will be useful in establishing and maintaining a healthy, ongoing partnership.

For additional information or questions, please contact Lucille Bertuccio, lbartucc@gmail.com, 812) 331-2726.

Sincerely,

Lucille Bertuccio, CSL Board Member



Re: Request for Proposal for Green Meadows Charter School
Ball State University Office of Charter Schools

To the Proposal Evaluators,

Bloomingsfoods is happy to support Green Meadows Charter School (GMCS) by establishing a partnership for food services. It is our pleasure to enter into a collaborative relationship with GMCS to further the important mission of providing healthful, high quality, and environmentally sound foods at a fair price to the greater Bloomington community.

Bloomingsfoods is a community-owned, cooperative grocery that has been operating successfully in the Bloomington market since 1976. Over those years, Bloomingsfoods has developed a well-respected reputation in Southern Indiana. We opened our second store in 1992 with roughly 400 member owners and our proud to have grown steadily over the last twenty years to more than 10,000 member-owners today. We strive to promote locally grown, organically produced food, sustainable practices, and emphasize community involvement and education. Likewise, GMCS strives to bring about positive change to the community through the pursuit of holistic education, and education for sustainability and social justice. Our core values support each other; highlighting key components such as self-responsibility, care for others and the natural world, social responsibility and honesty, and equality. In fact, three out of seven of the "International Cooperative Principles" (guidelines that all cooperatives agree to operate under) that help to define our values, align with the core beliefs of GMCS, including, 1) Education and Information, 3) Cooperation, and 4) Concern for Community. These three principles reflect the nature of the relationships we seek as an organization, and we are confident that GMCS will follow these principles as well.

In addition to the fact that our overarching goals are similar to GMCS in regard to community education and a commitment to sustainable practices, we are also committed to the ongoing support of projects that build and strengthen our local and regional food system. Therefore, it is our express interest to assist GMCS as their food service provider. Each year, we develop and implement projects that our designed to enhance our business as well as our community. The opportunity to partner with GMCS excites us, helping to elevate our food service operation to a new level by increasing our capacity for educating students about nutrition, food preparation, and the connections from growing food to serving it. GMCS has plans for an Edible Schoolyard along with a long-term goal of Farm to School, two programs we would love to see take root in our community, and be a part of helping to make it happen. These programs educate and promote a more sustainable lifestyle in our area. These processes deliver experiences which foster sustainability for everyone involved. We enter into collaboration with this interest in mind, along with a solid background in food service. With a central production facility (commissary kitchen) and 3 grocery/ deli stores as a foundation to our fresh food business, we are confident that we can provide high quality, nutritious breakfast and lunch to the students at GMCS. Our steady and growing financial position gives us the ability to provide sound services and cooperation with school staff. Lastly, we have experience working with national guidelines for student nutrition through management of FoodWorks (our central production facility) and our contracts with the Bloomington Project School.

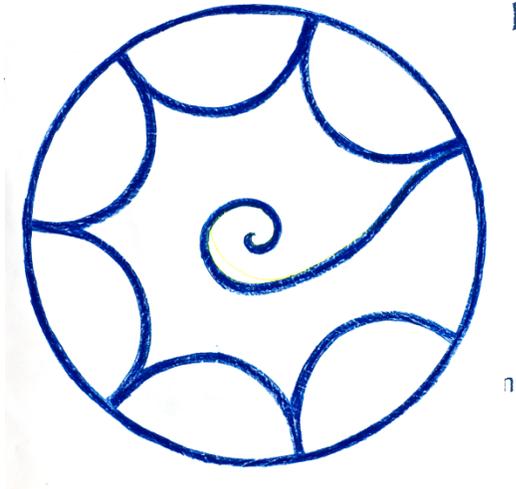
This relationship shows we are committed to providing quality food for our community's growing youth, and brings an important template for recognizing the underpinnings of serving a school population into our relationship with GMCS.

We view a partnership with GMCS as a win-win situation. GMCS receives a quality food service at a fair price, which aligns with their mission and vision to promote environmental sustainability, and we continue to grow our business with the potential for gaining new member-owners via relationships with school families. All of which in the long run, helps to improve the quality of life in our surrounding community.

For additional information, please contact George Huntington, 812) 339-4442 x.103, gm@bloomingfoods.coop.

Respectfully,

George Huntington, General Manager



Kentahten Teacher Training:

Education for a Sustainable Culture

1260 Willow Ave

Louisville, KY 40204

July 21, 2012

Dear Mary,

Kentahten Teacher Training would be happy to provide Waldorf Teacher Training for Green Meadow Charter School's staff. Kentahten has been training public and private school teachers in Waldorf-inspired education since 2005.

Our mission is to inspire and challenge educators to fulfill their calling through training in the cultivation of human capacities. This training integrates the artistic and healing pedagogy of Waldorf education with 21st century educational research, resulting in a more deeply developed understanding of the human being.

After speaking with the board of trustees of Kentahten Institute of Waldorf Instruction, they have agreed that offering the support to Green Meadows Charter School is definitely part of their mission.

Furthermore, the instructors of the training have agreed to offer classes in Bloomington in order to facilitate the opening of Green Meadows Charter School in a timely manner.

Please feel free to call me anytime to discuss plans for future training.

Sincerely,

Donna Stottmann

Board President,

Kentathen Institute for Waldorf Instruction



Mother Hubbard's Cupboard

food pantry · community gardens · nutrition education

1010 S. Walnut Street, Suite G Bloomington, IN 47401

Re: Request for Proposal for Green Meadows Charter School
Ball State University Office of Charter Schools

To the Proposal Evaluators,

At Mother Hubbard's Cupboard (MHC), we understand that organizations rely heavily on the local community for support. This is why we look forward to establishing a mutually beneficial relationship with Green Meadows Charter School (GMCS) if they are approved for implementation.

Mother Hubbard's Cupboard works to increase access to healthy food for all through our patron choice food pantry, community gardens and nutrition and garden education programs. Our pantry focuses on whole foods and operates on a patron choice model, allowing clients to shop for their own groceries, trusting them to make choices that meet the nutritional needs of their families and eliminating the waste that often comes with a traditional food pantry model. In addition to food distribution, gardening and nutrition education are central to MHC's mission. We provide these educational opportunities through volunteer and youth gardening programs at our three community gardens, and public class offerings on food preparation and nutrition. We make it possible for patrons to grow, receive, and prepare healthy food.

To maintain our operations, we have an ongoing need for volunteers, both at our community garden spaces and in our food pantry. Over 150 volunteers power our programs on an annual basis, supporting MHC with more than 10,000 hours of service. A volunteer partnership with GMCS would help to meet our volunteer needs while providing the school community opportunity to learn about food justice through practical experience and service in an established community agency. Potential areas for service will be chosen based on timing and the needs of each organization.

We look forward to a fruitful relationship with GMCS. We believe our volunteer opportunities will help the school community fulfill their goal to provide a sound, practical education in sustainability and social justice.

Please direct questions to Amanda@mhcfoodpantry.org

Respectfully,

Amanda Nickey
President & CEO
Mother Hubbard's Cupboard



social justice | equity | sustainability

February 20, 2014

To Whom It May Concern:

The School Project Foundation (SPF) has been supporting the development of The Green School (TGS) since September 2011. SPF receives foundation grants to support the development of new schools that have evidence of a commitment to social justice, academic excellence and environmental sustainability in the school's vision, mission, core beliefs and curriculum. All services have been provided at no cost to the Green School, and it has been our pleasure to support their efforts.

As the Executive Director of SPF, I will be providing in-depth professional development to the entire faculty as well as leadership and board training, over time. I will be leading a 2 hour professional development experience for the faculty 3 times per month embedded in the school day.

As a founder and director of the National School Reform Faculty at the Annenberg Institute for School Reform (NSRF) at Brown University, a founding board member of the School Reform Initiative (SRI), and as a contributing columnist (over 18 articles to date) for the National Association of Secondary School Principals' journal, "Principal Leadership," I have had over 25 years of experience providing professional development to schools, district, state and national organizations.

Several of The Project School (TPS) faculty are National Facilitators for both NSRF and SRI, and will be providing professional development in Reader's and Writer's Workshops and in Responsible Classrooms. SPF will also be providing Critical Friends Group Coaching training to all TGS faculty to ensure the highest quality of teacher collaboration.

TPS - chartered in 2008 - is an "A" rated school by INDOE. Over the last four years, students of TPS have demonstrated academic growth in the top 2% of all public schools in Indiana, and have demonstrated significant growth in both Language Arts and Math over each of the last 4 years.

I have full confidence in the founders of The Green School, and look forward to the opportunity to continue to support their outstanding work.

Sincerely,

Daniel Baron
Executive Director

school project foundation

349 south walnut street | bloomington, in 47401 | 812.558.0041 ext. 2001 | schoolprojectfoundation.org

Letters of Support

On April 21, 2013, The Green School (under our former name of Green Meadows Charter School) re-submitted a charter proposal to Ball State University's Office of Charter Schools. At that time, many of our community friends and partners wrote in support of our endeavor. Some of those supporters also sent a copy of their letter to The Green School's Founding Group. We offer them as a small sample of the kinds of letters written in favor of our initiative. Although we recinded our proposal to BSU on November 15, 2013, the Founding Group and school plans remain the same. The name change was made in response to a formal request by a private Waldorf school in Chestnut Ridge, New York, and do not reflect a change in mission, vision or core beliefs.



DEPARTMENT OF BIOLOGY

INDIANA UNIVERSITY
College of Arts and Sciences
Bloomington

21 February 2014

Dear Indiana Charter School Board Members and Green School Application Reviewers,

It is with great pleasure and enthusiasm that I write in support of The Green School and their application for a Charter School in Bloomington, Indiana. Since joining the IU faculty in 1992 I have been witness to remarkable positive change in our Bloomington and Indiana University community. As a scientist, science educator and interdisciplinary degree program director I have had the privilege to participate in a local, national and international scholarly community seeking to explore and understand the intersections of teaching and student learning and to implement classroom and curriculum best practices that are founded on evidence of student learning.

Recently I have witnessed a renewed interest in the inclusion of creativity in the higher education classroom and curricula and the central role of creative thinking to critical thinking, problem-solving, innovation, intra and interpersonal communication and understanding of self, all essential skills for exceling in the fast changing and complex world of the 21st century. Critical thinking has long been regarded as the essential skill; however, creating moves beyond the synthesis and evaluation of critical thinking. In fact, “creating” has replaced “evaluating” at the top of the well-known Blooms taxonomy. The Green School has situated their curriculum and core values in the creative process with the natural environment serving as the context for learning the content of the basic disciplines and sustainability guiding the understanding of real world interdisciplinary complexities. The creative process safely scaffolds the learning to transform student uncertainty into innovative solutions.

In my 20+ years teaching IU undergraduate, graduate, and professional students I have come to appreciate that learning is contextual, social and individual. Offering students different learning environments and learning experiences is essential for fostering the expected individual graduate, global citizen and professional. Therefore, we must pay attention to the differences; differences in student interests; differences in ways of learning; differences in ways of thinking and differences in the ways in which we relate to the world around us. It is these differences that allow one student to thrive and another to merely survive in a particular learning environment. The Green School has articulated a very clear signature pedagogy and rigorous learning outcomes. The clarity with which they distinguish their proposed learning environment from others will permit families to work with them to determine if this learning environment is best for their student’s learning style and goals. Having this unique learning environment within our public school district provides for different ways of knowing and habits of mind, respecting the individuality of learning and allowing all students in our community to have the choice to pursue learning in a manner that best suits them.

Lastly, The Green School with its commitment to teaching and learning in the context of environmental sustainability expands the opportunity for the community to engage with public school education. The environment and sustainability are key areas of research and interdisciplinary teaching on the IU Bloomington campus and provides for one of many points of intersection in connecting our public schools, The Green School, with higher education. Additionally, our Bloomington community commitment to concerns of the environment and sustainability offer opportunities for connecting and involving the local community at large in inspiring our young citizens to engage with authentic issues and problems and share in innovating solutions and celebrating our success stories. I am confident the passion of the founding board of The Green School for community partnerships will ensure the likelihood of growing community connections and expanding community participation with the school.

Thank you for your thoughtful consideration of this letter in support of The Green School charter school application and for giving so generously of your time in the review process.

Sincerely,

Whitney M. Schlegel
Associate Professor of Biology

October 14, 2013

Dear Office of Charter Schools:

I am writing this letter in support of Green Meadows Charter School. As a retired professor from Indiana University's school of education, I feel confident that Green Meadows will make a valuable contribution to the community for a number of reasons.

First, there are many students who do not fit in socially nor are they successful academically in the traditional public schools. These students deserve an alternative type of education, one that meets them where they are developmentally and nurtures them socially. The mission of Green Meadows is to teach children academic subjects through the arts and real world experiences and their vision is to help all children become change agents for their community. Students and families seeking an alternative will thrive in this type of an environment. Currently, the other charter school in Bloomington has over 200 children on their waiting list and Harmony School, a private school with a similar mission, has a waiting list of 100 students.

Second, you can be confident that the Founders of the school and those slated to administer the school have years of experience in education. I served as chair of Dr. Goral's dissertation committee (her dissertation focused on Waldorf education and its implication for the public school setting), and have known for nearly 20 years of her dedication to this mission of bringing Waldorf-inspired education to the public schools.

Finally, most people that I know voted to support the referendum in Monroe County (that supported MCCSC). These same people also support the Bloomington Project School, Harmony School, and other alternative schools in the area. Support of the referendum only means that the public believes in what is best for the children in the community. In the same vein, the majority of the Bloomington public believe in what GMCS will offer children - a chance to be engaged in their education, to learn about social justice and social difference, a respect for the local environment, and a love of learning. Please grant GMCS their charter.

Sincerely,

Jesse Goodman

Jesse Goodman, Emeritus Professor
Education and American Studies
Indiana University

October 22, 2013

Dr. Bob Marra

Office of Charter Schools

Ball State University

Teachers College, Room 910

Muncie, IN 47306

Re: Support for Green Meadows Charter School in Bloomington, Indiana

Dear Dr. Marra,

I am writing on behalf of the Bloomington Economic Development Corporation (BEDC) in support of the proposed Green Meadows Charter School at the Woolery Stone Mill site in Bloomington, Indiana. We are excited about this proposal and believe this new charter school will become a great asset to our greater community and strengthen the region's economic vitality.

The BEDC is our region's leading economic development entity. While we still engage in traditional economic development business recruitment, retention and expansion, we have increasingly focused our efforts on talent attraction and workforce development. For example, we manage an innovative talent attraction portal (bloomingtontech.com), produce a tech-related career and internship fair, and host networking events. We are planning a series of software coding classes in part of this workforce initiative.

Through both our traditional economic development events and primarily through our talent attraction activities, we have experienced first-hand the importance of school choice and program diversity. Many in today's workforce are making place-based decisions and educational quality and choice can factor heavily into their decision on where to live and work. Consequently, Bloomington and Monroe County's ability to retain working families is greatly influenced by the educational choices our community offers.

For these reasons we endorse the proposal to create the Green Meadows Charter School (we also supported the The Project School). Our community has responded with overwhelming demand that far exceeds the space available in The Project School. This demand is a great endorsement for the Green Meadows Charter School.

We are also excited about the siting of the school at the Woolery Stone Mill. This site has been pre-approved for tax abatement, is near a recently improved multi-use trail system, natural areas, a city park, and residential neighborhoods. As well, the Woolery Stone Mill is within a Tax

Increment Finance (TIF) area, an economic development tool that enables public infrastructure improvements. The TIF was recently utilized to upgrade West Tapp Road, the trail, and a walking bridge, enabling this site to more safely accommodate increased foot traffic as well as automobiles and bicycles.

We believe Green Meadows Charter School will only improve the Woolery Stone Mill area and may lead to other complementary investments adjacent and proximate to the site.

An educated citizenry and a talented workforce are the two most critical issues influencing a community's economic vitality and quality of life. In a short time, The Project School has already benefitted the community by offering a new, progressive and effective education alternative. We believe Green Meadows Charter School will further benefit our region by strengthening our community's ability to retain and attract the talented workers and leaders who will help us develop a vital, sustainable and competitive economy well into the future.

Thank you for considering this letter of support and please do not hesitate to contact me if you have any questions. If you would like to meet while you are in Bloomington this week please do not hesitate to call (cell: [812-340-3829](tel:812-340-3829)) or email: rwalker@comparebloomington.us

Sincerely,

Ron Walker

President, BEDC

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Ron Walker, President
Bloomington Economic Development Corporation
Bloomington, Indiana
Office: [812.335.7346](tel:812.335.7346) Cell: [812.340.3829](tel:812.340.3829)
www.comparebloomington.us

Charlotte Thiele Zietlow, Ph.D.
213 South Bryan Bloomington, Indiana 47408
812 339 7188

Members of the Ball State Charter School Committee

Dear Members of the Committee,

I write to you today asking for your positive consideration of the Green Meadows Charter School in Monroe County, I believe it is under your consideration for a decision in the next few days. I hope you will find it worthy of adding yet another dimension of opportunity for the children of our community.

And it is the children who are, of course, of greatest concern. Whether or now some children will go through their school years learning as much as they are capable of learning, developing critical thinking skills, relishing the satisfaction of better understanding the world and themselves, becoming productive, positive adults—all of these goals are surely what education is about.

My perspective is complex, but informed. As A Trustee at Indiana State when the state was searching for a home for the Charter School Certification project, I discouraged the School of Education from pursuing it, because I had a strong suspicion of the whole movement. That suspicion was colored, for the most part, by the For-Profit corporations that have benefitted from concern about public schools, and I believed, then, as I do now,, that there is much to be concerned about with those national systems that have, to a great extent, benefitted their investors more than their students. However, even there I have come to believe we cannot tar all of them with the same brush.

Secondly, and more importantly, I have been leery of the impact of the Charter School movement on the public school system in this country. I firmly believe that the effectiveness of our democracy depends on excellent public education from pre-school to doctoral programs. I am aghast at the assault on public schools and teachers unions that is rampant in the United States and I recognize that there are many charter school supporters who specifically want to undo and undermine our public schools. This trend has to be reversed.

Thus, I find myself caught in a dilemma, but an honest one. I believe in public schools. I knocked on doors and carried petitions for the MCCSC referendum, and pleaded with people to support it, and I would do it again. I am a paying member of the Indiana Coalition for Public Education.. I believe in them.

However, I have come to believe that while we should take whatever steps we can to support well-funded public school systems and the teachers in that system, we also have to recognize that we have children today who are not well served by their public schools.

Much of my life has been devoted to public service—I have been in public office at the City of Bloomington and Monroe County, I served Indiana State for sixteen years on its Board of Trustees, five as President of the Board,, I was Executive Director of the United Way of Monroe County, a Community

Organizer for Planned Parenthood throughout southern Indiana, and an Economic Development Coordinator for Middle Way House, Inc., the domestic violence program in our area. I have owned and run my own business, and created and managed two additional businesses for Middle Way House clients. I have served on more boards and commissions than I can remember. I have a PhD in Linguistics from the University of Michigan, I have taught at the University of Michigan, Indiana University and the Wiesbaden Air Force Base. And I am a minister's daughter. I have had a lot of experience in the real world.

What I have learned, among other things, is that children love to learn. Children learn differently. Children learn better when they are encouraged to learn, and when they are surrounded by nurturing, supportive families –and sometimes when they only have a really good teacher along the line. I have learned that all teachers are not the best for all students, and that all systems are not good for all learners.

I have observed in Monroe County that some children, particularly (but not exclusively) from low income families or families in distress do not fit in well in our schools, and do not thrive. I have observed that some teachers bring preconceptions to the classroom that do not favor people of color or children who don't dress well or have disabilities of various sorts. Sometimes they just don't know how to deal with them. We don't want this to happen, I know, but it does.

I write this to explain that when I was approached to serve on the board of the Bloomington Project School in its inception, I had to consider my response carefully. I resisted the idea. Ultimately, though, I agreed to do so because I know Daniel Baron and his work personally, and I know a number of children who were falling through the cracks even in this very good school corporation. I felt, and continue to feel, that we should do what we can for the children, and that is the highest priority.

Since the BPS started, I have seen children I know who were struggling in public school thrive in the BPS.. For various reasons, they just do better there. This is not necessarily an indictment of the public schools. Some children do better with one situation than another. If they do thrive, we should rejoice.

You now have to decide about Green Meadows. I have known Mary Goral, the director, well, over the years. She brings energy, intelligence, knowledge and commitment to her proposal, coupled with a different approach to learning. It is not for everyone, but for some it may mean the difference between a happy, productive life and one less than fulfilled. It may mean a mind awakened, rather than closed. That possibility is the most important part of the decision you will make, and I urge you to support their proposal.

Thank you for your consideration,

Charlotte T. Zietlow, PhD.

Cc: Dr. Judy DeMuth, Superintendent, MCCSC

October 21, 2013

Dear Dr. Marra,

I am writing to the Ball State Office of Charter Schools to express my strong support for the Green Meadows Charter School (GMCS) in Bloomington. I am the CEO of Centerstone of Indiana and we currently serve over 5000 individuals and families in Bloomington. We are the largest not-for-profit provider of community-based behavioral healthcare in the State, offering a full range of mental health services, substance abuse treatment and educational services. This past year we served over 24,000 statewide. Our mission is to prevent and cure mental illness and addiction.

My children, Anna and Elijah, have attended the Bloomington Project School for 5 years. A traditional school environment would have challenged both of our children. While they are bright children without behavior problems, they do best in a more flexible classroom that is designed to meet their individual learning needs. Our first grade teacher and elementary school principal at MCCSC (who we highly respect) both supported our decision to move our children, believing that they would be more likely to be successful in the Project School environment. Both Anna and Elijah have excelled at the Bloomington Project School, meeting or exceeding expectations in all areas of learning. In addition they are confident, socially responsible, and valued members of their school community.

My professional learning and life have taught me that we need distinctive schools to meet the needs of all children. I believe that Green Meadows Charter School will be a school where any child can thrive, and for some it may allow them to succeed in ways that a more traditional setting would not. I also know that it takes a whole family to teach a child well and the GMCS's focus on family engagement and celebrations will provide many families a sense of belonging to a community. Many of our clients and families have a deep longing for community. Many also have specialized learning needs. GMSC will provide that for many people who share these needs. I strongly suggest that you approve this charter.

Sincerely,

Suzanne Koesel, LCSW
Chief Executive Officer
Centerstone of Indiana
645 S. Rogers Street
Bloomington, IN 47403
(812)337-2350 office/(812)360-7263 cell
Suzanne.Koesel@Centerstone.org

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

September 19, 2013

Ball State Office of Charter Schools,

I am writing in support of the Green Meadows charter school currently being considered as an educational alternative for the children of Bloomington, IN and surrounding areas. My two children have attended The Project School in Bloomington since it's opening. This letter will speak to the specific benefits my children and family have experienced as a result of TPS and also address the general issue of MCCSC versus charter schools.

As a lifelong member of Bloomington and an MCCSC alumni, I have no animosity toward the school system. My children did not leave MCCSC because of a bad experience or because I felt they would not get a good education there. But with the arrival of TPS, we had the possibility of an extraordinary education, a unique and enlightening education, and that is what we have found there. For example:

1. Individual attention: Every teacher in TPS school knows my children, every one, and not just by name – they know my children. Whereas Teacher/parent conferences in the past have felt like 'going through the motions', TPS conferences are actually a learning experience for me – these teachers can pinpoint fine distinctions and areas of growth for my child that are spot on.
2. Very little time is spent worrying about, studying for, or planning around the required standardized tests.
3. Instead of testing, TPS values passion. Last week a middle school teacher did a cartwheel in class to celebrate a student getting a math problem correct. Yesterday my daughter's friend told me with a smile on her face that their teacher had been yelling at them – because he was just that passionate about the knowledge he was imparting. More than making the school day fun and interesting, these teachers are modeling the thrill that comes from understanding and the joy that stems from involvement. It isn't 'weird' to be passionate about life – it's great!
4. Students can be themselves. With so much focus on creating a learning community accepting of all learners and thinkers, my children NEVER worry about what they will say, or how friends or teachers will react. I have watched over the years as this environment has blossomed the daughter I felt would always be shy into an outspoken, opinionated, informed and confident girl.

As to the plight of MCCSC 'losing money' as a result of charter schools, they have only to look in a mirror. For six years I have been an active volunteer in a Girl Scout troop that includes mostly MCCSC students. Year after year I have listened as the MCCSC kids stress out about standardized testing and constantly compare who got better grades on this or that. Now as they reach their teen years, I am saddened to see some of the girls becoming social outcasts for one reason or another. Their self-esteem is about to be crushed underfoot and the school no doubt considers this 'part of life'. Listening to these girls talk about middle school you would think they live on a different planet from the middle school experience of my daughter. Part of this is just the tiny size of TPS, but part of it is the mutual respect and understanding that forms the foundation of TPS. Most recently MCCSC is jerking parents around with crazy start dates and late Wednesdays that affect extracurriculars and family time. Who wouldn't want to at least explore another model? Another way to learn? We need these experimental, out of the box, passionate and PUBLIC charter schools if for no other reason than to *wake up traditional schools, encouraging them to question, reevaluate, and change for the benefit of students, teachers, our nation, and the world.*

Sincerely,

Cynthia Port

Dear Dr. Marra,

I appreciate the extra time and care being taken to look into Green Meadows Charter school. I share some of the same concerns many concerned citizens do about the charter school movement nationally and think funding traditional public ed is the backbone of our past and future as a nation of informed citizens, which is so essential to our community, state, and country as a whole. However, my children and those children in my community are not ideological pawns, and when I became familiar with a similar school (The Project School in Bloomington) and saw first hand as a state employee working in the school how they operated and the care they took with some children with special needs while fostering creativity and passion among the most difficult students to reach, I fell in love with the school and applied for my children to join the next year.

I'm sure you have received a lot of letters from Project School families (a passionate bunch), so I won't try to explain every wonderful thing about TPS. My perspective is a little different because at the time I enrolled my children in the school I was a case manager for the Department of Child Services. I was working with two families with children at TPS. Monroe Co schools generally make a strong effort to support special needs children and families in crisis, but what I saw at TPS went far beyond what I'd seen elsewhere. The ICP meetings were attended by several teachers, a school leader, and a specialist brought in to evaluate the student due to her individual challenges. I saw that another school employee had made sure the student and her brother were involved with Big Brothers/Big Sisters and taken one child on as a mentor. I saw the two school leaders staying after several times a week to work individually with the two students. I was used to being worried that schools would eventually try to push the students out of the school due to the resources demanded, but at TPS they truly rallied around the children even though most of the children in question had challenges no school could be expected to meet. They wanted those children to get what they needed, and they took it upon themselves to go the extra mile. As important as the time was, it was the passion more than the time, that was making a difference for these two families I was working with.

However, my children are not special needs children. They are bright children with emotional and empathetic gifts. I wanted them to learn among a diverse group of children that included different backgrounds and ability levels, and I didn't want my children to go somewhere where there are too many special needs children and the teachers are slowed down like so many teachers worry about in traditional public schools. So I talked to more parents, and I paid more attention to the other children in the school, and I spoke with some teachers. TPS does accept a lot of special needs children, and they do a great job of making sure the other students benefit from their presence rather than allow the school's approach to take away from the other students. And the many advanced students at TPS are just as challenged and engaged as anywhere else. It's a unique place where the students value each other more than elsewhere, they seem to get that their differences are their strength.

I admit I'm skeptical about the broad Charter School movement in general. For-profit charter schools drain dwindling resources and frequently don't accept the type of children that are so well supported at TPS. Test scores tend to be at least as good in traditional schools. But my children, and many others in our community, deserve to have the type of education being offered by Ball State and local school board's enlightened decision to support and work along with TPS and Green Meadows. Something special is happening here, special enough that I as a certified teacher, former DCS case manager, and Masters in Public Affairs put aside ideology and recognized I had to have my children be a part of it. Please, please, please, support this effort by keeping the Green Meadows school open. Judge these orchards by the fruit they bear, not by the slogans and ideology of well intentioned critics before they get off the ground. Ball State and the local school corporations working with these schools have a chance to be a state and national leader in using these positive non-profit charters to serve the community and students. It's a microcosm of public education's challenges nationally, support it and fund it generously and the world will be better for it. Even if many school reform movements fail, we should embrace and encourage those that show promise and recognize what is

different about these schools compared to the others. The parents of TPS students appreciate this school more than I've ever seen in a community. Its not just a success, but a wild one.

Thanks for taking the time to read this and let me know if I can be of any service otherwise.

Chris Marksberry

October 13, 2013

To those at the Office of Charter Schools:

This letter is written in complete support of the Green Meadows Charter School, with an enthusiastic plea to approve their proposal. I am both a parent and a counselor. As a parent, my son has attended both public school and The Project School in Bloomington. The unmatched passion for learning, self-motivation, focus, and success mindset that he developed through his time at TPC is extraordinary and will undoubtedly serve him for a lifetime, expanding his capacity to make a difference in his community.

As a counselor, I've worked with many youth who have made the change from public school to a more holistically-minded education model, and it has truly changed their lives, not only improving their academics but also their interpersonal skills, their self-worth, and their inspiration to be an agent of positive change in the world. There are many stories of youth who experienced anxiety, suicidal thoughts, and depression in a public school setting. When they changed to an educational model similar to the GMCS, they regained their joy, confidence, love of life, and desire to do good for others. These kinds of life transformations cannot be measured, and the impact is far greater than we can see into the future.

That's how I feel about GMCS: it's impact will be exponential and profoundly greater than anyone can measure. Comparing dollars with the Monroe County School Corporation completely undermines the rippling influence affecting change in these students will have on our community. I see the students coming out of GMCS being leaders, catalysts for positive change, visionaries, the ones who will change history in the most extraordinary of ways.

Furthermore, the founders of GMCS are people of the highest caliber, integrity, ingenuity, talent, insight, and care. I wholeheartedly trust them to bring their vision to fruition in ways even greater than what they've outlined in their application.

Thank you so much for all you do and for all the support you give to GMCS!

Sincerely,

Christine Earheart

September 19, 2014

To Whom It May Concern,

My name is Debbie Rutledge Lockyear and I am a Waldorf Inspired Educator. In 2004, I graduated University of Louisville with an MAT in education. I was 34 years of age, embarking on a career in education after ten years in the brokerage business. Fortunately, my mentor teacher was a Waldorf Inspired teacher and her guidance changed my life. I learned more about the art of teaching, engaging children and finding individual peace during the hectic days through my Waldorf trainings than I ever did at university.

After two years, I left Byck Elementary and landed at Hartstern Elementary teaching Kindergarten. I was an oddball at the conservative school. Arts were everywhere in my room and displayed on the walls. We learned poems with dramatic movements to practice skip counting. We heard magical stories of King Plus and his wife, Queen Minus. They became characters used to dramatize math skills after story mats were illustrated of the royals. Through the wonders of Waldorf pedagogy, we learned to write and illustrate; sing and dance; and grow. My students were the lowest Kindergarteners entering the school that year. As a matter of fact, during the second week of school, testing showed only four students on grade level. By the end of my first year of teaching Kindergarten, my Waldorf educated students were the highest achieving students in the four Kindergarten classes! And the others were all taught by *veteran* Kindergarten teachers.

Currently, I teach Arts & Humanities. Every day, I find a way to incorporate Waldorf techniques in the classroom. The students, Kindergarten through 5th grade, thrive in such a creative setting.

I was proud to incorporate the arts in my classroom long before Kentucky initiated the Arts and Humanities Program Review. Waldorf Inspired pedagogy is good for the soul of the teacher and for students alike.

Sincerely,

Debbie Rutledge Lockyear
Louisville, KY Waldorf Cadre Member since 2005

October 24, 2013

RE: Support for Green Meadows Charter School

To Whom It May Concern:

Good Morning,

My name is Gioconda Guerra, Director of La Casa Cultural Latina at the University of Illinois Urbana Champaign. Before joining UIUC, I lived in Bloomington IN with my family and I worked for the Indiana University System for 3 years at different capacities (Socio-Cultural Specialist for the New Neighbors Center at IU Southeast and as a Visiting Assistant Professor in the School of Education – Graduate Studies Program). I have been working with Latino Families and Latino K-16 students for more than 10 years.

However, I am not writing this letter on behalf of IU or UIUC. I am writing this letter as a mother of two beautiful young children (José y Natalia Andino Guerra). While living in Bloomington, IN my children were privileged to attend the Bloomington Project School, a PUBLIC charter school. During their first three years of schooling, my children were able to learn not only the value of reading, writing, math, and art; but also were able to grow academically to understand the intricacies of life by critically thinking the ways the world works and how things related to others. My kids love to get up in the morning and before even getting their breakfast they were already with a book (reading) in hands. It amazed me (and still does) the way teachers and leaders at the school related to my bilingual children. They were greeted in Spanish and they were sent home with an “adios”. The feeling of acceptance and belonging to the school was one of the key components that made their experience “the best of Bloomington” according to their own words.

The Bloomington Project School has created such connections with families & communities locally and globally that has opened up a different dimension of education. I remembered showing the school to teachers from Ecuador, who were so fascinated to see how our Public Education System allows the creation of “charters” schools where parents have the opportunity to experience education not as spectators but as active actors in the education of their children.

The opportunity to have another Charter school in Bloomington will allow families to choose from a different public school. Reading the statement from MCCSC that is so obsolete and inaccurate really make me think as a “professional in higher education” in the detriment such comments have on our public education system. MCCSC statement is based on “money allocation”, rather than educational opportunities for our children. It is at the end, the option of parents where to send our children. Our decision is based on our own experience and expectation. So, to send our children to an alternative public school is a choice we make and we thank for such opportunity, because it shows us someone cares and I hope Ball State Board does care too.

Sincerely,

Gioconda Guerra, PhD.

Dear Dr. Marra,

I am writing to the Ball State Office of Charter Schools to express support for the Green Meadows Charter School in Bloomington. I am the Director of the Campus Children's Center (CCC) as well as a parent of two school-aged children.

CCC serves children from 6 weeks through 5 years. Our program is developmentally appropriate with emphasis on developing the whole child as an individual with an emphasis on healthy self-esteem through social and emotional well being. As our philosophy is based upon developing strong relationships with children and their families, we understand our children well by the time they graduate and head off to kindergarten.

At CCC we focus on the individual child, recognizing and celebrating that each child learns in unique ways. We believe that children succeed best academically when they are in learning environments that are flexible and responsive to their learning style and individual needs. As such, we support school options in our community for children, whether it is a traditional or a charter school setting, to ensure that each child's individual learning style is addressed, met, and celebrated.

Additionally, my son, Sam attended the Bloomington Project School (TPS) for 3 years and we were very happy with the learning he experienced. We were attracted to TPS because of the multi-age classrooms, as Sam is a learner that responds best to educators who genuinely know him as an individual. At TPS he would have the same teachers from 6th thru 8th grade. This philosophy served him well both academically and socially. Sam's testing scores increased during his 3 years at TPS and, more importantly to us, it was touching to learn that our sometimes quiet and reserved child had become a positive influence and leader in his school.

The fact that the Bloomington Project School has been successful and holds a long waitlist is a strong indication that our community is also supportive of school alternatives. As an education professional and a parent, I support your approval of this charter.

Sincerely,

Christin Smith

Dear Dr. Marra,

Hello. My name is Heather Ayers-Marsh. I am the parent of Mark, a special needs student currently in 6th grade at the Project School. Mark is on the autism spectrum, has pervasive developmental disorder, a mood disorder and an oppositional defiance disorder. Mark is a free lunch child.

I am an unemployed single mom with several medical issues and due to Mark's condition he had a series of traumatic experiences where the local schools were unresponsive to Mark's special needs and he ended up just hating school. His school life was his own personal hell.

Mark was awkward at his previous school, and was unaware of the social cues of other students. He is a caring person, who cares about how he treats others and how he makes them feel. At his previous school, he didn't feel as though he mattered.

As an observer of children at The Project School, even when no one is watching (they don't think anyone is watching), they treat one another with care. The parents are plugged in because they are choosing the school. The children then get the message at home that school matters and how you treat others matters. They get the message that how you treat the world and how you interact with the community will impact the world in the future. We have to be thinking about what kind of people we want to raise. Bullying is not a problem at The Project School in a way that it was a problem in the regular schools.

Mark's previous public school environment was so hostile, that it made it virtually impossible for him to be successful as a learner because it made him hate school. It encouraged him to misbehave as a way of school avoidance. Because he was so unhappy at school, when he was suspended I actually could understand that for him it was a relief, and not a motivator to encourage him to do better.

At The Project School, Mark feels that people are willing to listen to him and be patient with him. He feels part of this community, and not separated.

I understand that TPS had to turn away 200 hopeful children this school year because there are so few chances to get in. Mark was on the waiting list for four years. I was scared that Mark would not want to go to TPS but after his tour/visit he was really excited to come to TPS.

Please charter the Green Meadows Charter School so that other children will have other school options. It is terrible to be stuck in a bad situation at school and you feel as if you have no better choice for your child.

Thank you for your consideration.

Sincerely,

Heather Ayers-Marsh

Beaumont, 24 October 2013

This letter is in support of the chartering of the Green Meadows Charter School in Bloomington Indiana. This school is a great addition to the Bloomington community as it shares the values of the Bloomington Project School which has received great acceptance in Bloomington.

My two children attended the Bloomington Project School for three years until we moved out of Indiana. The Project School is committed to social justice, educational equity, and environmental sustainability. As a Hispanic immigrant in the United States, I found this powerful statement comprised what I want for my children's education. By definition, this commitment ensures that everyone is welcome and that is precisely what we were excited about when we decided to put our children in the school's lottery. The education that my children received at the Project School is something that has greatly impacted their life and we think many more should have the opportunity to experience it.

As I mentioned above, our children were selected through a lottery, no special treatment. As of today, the lottery is not anymore able to offer entry to a long list of children. This clearly means the Bloomington community has identified with the school's philosophy, but most importantly that there is a need for a new place with the same ideas that can accommodate more children. This should not represent a problem for schools in Bloomington; in fact, it enriches diversity and allows for possible exchanges between students that would not be possible if there were no other options. Being part of The Project School was a fascinating learning process, most interestingly, was the realization that The Project School operates essentially as a public school, with the opportunity to shape their curriculum based on the mission statement of social equality.

As an educator at the college level I see the need to work on the education of children from the most basic level. The world is changing very rapidly and it is very important to create leaders in our world that know how to question what we are up against. We need to recognize that the public educational system cannot accommodate all possible alternatives as it is virtually impossible; therefore, the creation of schools like the Project School is extremely important. I hope you consider chartering the Green Meadows Charter School that is being created with the help of the School Project Foundation. This school shares many of the same values as the Project School and will be a great addition to the Bloomington community.

Thanks for your attention.

Sincerely;
José G. Andino, Ph.D. Chemistry Instructor
Lamar University Beaumont, TX

October 22, 2013

Dr. Robert Marra
Executive Director of the Office of Charter Schools
Office of the Dean
Teachers College (TC), Room 1005
Ball State University
Muncie, IN 47306-0625
Dear Dr. Marra,

As a board member of The Bloomington Project School (TPS) and long-time educator, I am writing to support the granting of a charter for the Green Meadows Charter School (GMCS). I have witnessed the high-quality education that TPS students are receiving and expect the same to occur with those students fortunate enough to attend GMCS.

I was originally not a proponent of charter schools and I am still against large corporate charters or charters that don't employ qualified, licensed teachers. My perspective changed when the local school district would not listen to administrators and teachers who wanted to try innovative approaches to teaching in district schools. At this point, I became an advocate of educationally sound charter programs. I might add that TPS has some of the finest administrators and teachers in the area.

In addition to high-quality personnel, all students, especially those with special needs, are receiving an individualized and outstanding school experience. TPS students are learning in a caring environment and receive a relevant and exciting education. ISTEP scores are rising each year. TPS is a place where all students can thrive both socially and academically and I assume the GMCS will provide a similar growth model for students.

Unfortunately every year when TPS holds its lottery for new students, few new families are able to join the school—there just aren't enough spaces for additional students. The community would be well served to have another alternative for students who aren't thriving in the Monroe County Schools.

Please approve the GMCS charter application to better meet the diverse needs of our community.

Sincerely,



Mitzi Lewison

September 21, 2013

Greetings,

I was unable to attend the last public meeting regarding this school, so I am thankful to this opportunity to contact you directly regarding this school. I appreciate it, and your work in reviewing the charter application.

First, I want to share that I have been a homeschooling mother for the past eight years. In that time, I have consistently used Waldorf-based curricula to guide our homeschooling work. I respect the teachers and administrators and feel that Monroe County has very good public schools. However, they are not what I and my husband wanted for our daughter. Had a Waldorf charter school been available, we know we would have sent our daughter to it. We would have been active in her school and very glad to be connected to the part of this community that appreciates Waldorf.

We have been lucky to be connected to families (in this and surrounding counties) that also share a passion for Waldorf education. Most of them are homeschooling families. Sometimes we are able to share resources or plan lessons together. Often, due to schedules, age differences, or family obligations, we are much more on our own. We are committed to this because of the kind of education offered--because our children are becoming the very kind of people we had hoped they would. Our daughter, a slow reader initially, now reads voraciously, converses with adults on any number of appropriate topics, mentors younger children, and most importantly LOVES to learn.

I have also said goodbye to dear friends who moved away from this community in order to take their child to a Waldorf school--at great cost to themselves. Their costs were not only financial, but costs in terms of family, friends, and community.

Over the years, there has been increasing interest in this community in Waldorf education and its benefits. I am frequently asked questions about it by parents of young children. I answer questions all the time on any subject from middle school geometry to making Waldorf dolls. This is something a significant part of our community wants to see. I am confident it would be embraced and cherished by a good portion of this community.

I was upset to hear of MCCSC people showing up to the meeting this past week (and other public forums) to offer negative comment. There absolutely is room for this school, and it will be a light in our community. For eight years, our family has paid taxes to support public schools and done so gladly. I am glad of public education, generally. However, their behavior in this matter is extremely disappointing.

I am supportive of Green Meadows Charter School. I admire the group's commitment to not only offering Waldorf education in the community, but pursuing a public charter school, so that it will be accessible to all children. I appreciate the vision and commitment of Dr. Mary Goral to this project. I wholeheartedly encourage you to approve this charter.

If there is anything else I can do to be helpful, please don't hesitate to ask.

kindly,

Rhonda Baird

Bloomington, IN

October 17, 2013

Dear Office of Charter Schools:

I am writing this letter of support on behalf of Green Meadows Charter School. Although I do not live in your community, I am familiar with Dr. Mary Goral's efforts and have had the opportunity to work with her in the past. We share a common vision of teaching students about the environment, social justice and sustainability.

For the last fifteen years, I have focused my research, teaching, and service on education for sustainability through numerous venues. Working with teachers and students in the United States, England and Costa Rica has given me a first-hand look at the benefits of teaching students about the environment in a developmentally appropriate manner. In my work, we use the local community and environment to teach academic concepts, which in turn deeply engages students in their work. Further, it teaches them a familiarity and love of where they live. And as a result, students create stronger ties to their community and a heightened commitment to serving as caring, contributing citizens.

It is my understanding that Green Meadows Charter School will do just this. The school's vision of teaching students about equity and the environment through community service projects will serve the Bloomington area well. Furthermore, teaching these concepts in a hands-on, developmentally appropriate way **and** Waldorf education inspired approach will allow those children who tend to struggle in traditional school settings to thrive. It will give them an opportunity to meet their highest potential and to serve their fellow citizens.

I highly endorse the chartering of this school. We need more schools in our country whose purpose matches that of Green Meadows Charter School. I am sure that Ball State University and the Bloomington community will be grateful when they see the positive contributions this school makes to the students, families and surrounding areas.

Sincerely,



David Sobel,
Senior Faculty Education Department
Antioch University New England
40 Avon St.
Keene, NH 03431
dsobel@antiochne.edu

The Herald Times

Friday, October 11th, 20013

Look at the numbers

To the editor:

In a prepared MCCSC statement, read at the proposed Green Meadows Charter School meeting, it was noted that a 200 student enrollment would decrease MCCSC resources by \$1,083,000, the equivalent of pay and benefits for 22 teachers. Let's look at the same numbers from a different perspective.

Instead of releasing 22 teachers or other instruction-related resources, release 10 midlevel administrators. Between 1992 and 2009, Indiana student enrollment increased 9.3 percent, teaching staff increased 15 percent, administrative and other nonteaching staff increased 46.2 percent. Indiana ranked 12th among states in this administrative bloat.

The diversion of resources to the charter school would be \$5,415 per student. The MCCSC funding amounted to \$11,453 per student in 2012. The outcome is $(\$11,453 - \$5,415) \times 200 = \$1,207,600$ remaining in the system, increasing MCCSC funding per student. If it were not for bloated fixed costs and fear of losing their monopoly on the delivery of education services, MCCSC would be celebrating. The charter school would enhance their resources and ability to educate our children.

Careful research clearly shows that competition from alternative schools improves student performance, in both the public and alternative schools. Empowering parents is not a terrible idea.

LLOYD ORR, Bloomington

February 17, 2014

To whom it may concern:

I am writing this letter in support of the new "Green School". I have a daughter who would enter Kindergarten in 2015.

The traditional public school system clearly works for some students but definitely not for all. If the traditional public school system does not work for my child, I'd love to have alternatives. Yes, there are alternatives in this town, if you have \$\$\$. Not everyone has money to send their kid to a private school, why should people of a lower SES have fewer options than those with a high SES?

I'm all about people of all socioeconomic statuses having alternatives to MCCSC, not just those who can buy their way out of it. If the MCCSC had such a wonderful system then 200+ people wouldn't be applying every year to get into the Project School.

If the Green School was to open by 2015 I would strongly consider it for my child. Even if I decided it wasn't a good fit, I'd still support it being available to the Bloomington community. I truly hope you can make this school a reality.

Thanks,

Shelley Swain

shelley.swain@gmail.com

February 23, 2014

To whom it may concern:

Our family is in full support of the Green School proposal for Bloomington, Indiana. We have two children who are currently homeschooling and would view it as a gift if we could send our children to a school with such a mission and vision as the Green School. Our eldest daughter was not thriving in one of the best public schools in our area (Kokomo, IN). We withdrew her from enrollment and started looking for a school that matched our vision of education for our children. The principles of the Waldorf inspired schools was determined a perfect fit for our family. Happily, we discovered an initiative was active in Bloomington, Indiana and we immediately started making plans to relocate our family to the Bloomington area. Once we arrive, we are eager to help in the progression of making this school a reality, and giving this gift of an education inspired by Waldorf methods to our children.

Sincerely,

Ryan and Carla Carey



Special Meetings with Community Leaders

Dr. Judith DeMuth, Monroe County Community School Corporation, May 1, 2013: Dr. Mary Goral and Daniel Baron met with Dr. DeMuth and explained our school's mission, vision and proposed timeline.

Dr. David Schaffer, Brown County School Corporation, December 19, 2013: Dr. Mary Goral met with Dr. Schaffer, superintendent of Brown County Schools to inform him of our work to date, our timeline, and our desire to collaborate if the potential arises.

Dr. Judith DeMuth, Monroe County Community School Corporation, January 15, 2014: Dr. Mary Goral and Michelle Henderson met with Dr. DeMuth and discussed our continued work seeking a charter, the proposed timeline and the desire to work collaboratively (as opposed to being in competition) with MCCSC.

Todd Young, Congressman, IN 9th District, November 7, 2013: Bill Goral and Michelle Henderson, founding members, met with Todd Young at City Hall in Martinsville, Indiana. They provided Representative Young with information about the proposed charter school and discussed strategies for creating positive public opinion about charter schools as well as resources for funding charter schools. Representative Young expressed his support for the efforts that the founding members were making to provide an alternative option for families who feel that traditional public schools aren't the best fit for their students.

Mark Kruzan, Mayor of Bloomington, April 21, 2013: Daniel Baron and Cathy Diersing met at a lunch with the Mayor about starting a new charter school with a focus on social justice, educational equity and environmental sustainability and the potential of the Woolery Stone Mill as the school site. The Mayor was already aware of the site selection through his previous conversation with Ron Walker, the President of the Bloomington Economic Development Corporation. Ron Walker has written a strong letter of support for the school.

Community Interest Survey

A survey was created in the winter of 2013 to gauge interest in the mission and educational approach of The Green School. Questions asked those taking the survey to indicate their level of interest in a new public charter school 1) that offers intentional, arts-infused, developmentally appropriate curriculum 2) that addresses issues of sustainability through reverence, respect, and responsibility for the natural world, self, and the community 3) where children learn practical arts such as gardening, woodworking, and handwork 4) that has outdoor education as a regular part of the school day 5) where children engage in developmentally appropriate community service 6) where parents are welcome as a regular part of the school community and 7) that honors and teaches to the whole child. Across the seven questions and as an average, 80% and above of those 143 individuals surveyed said they would be 'very interested' in such factors, approximately 20% said they would be 'interested', and 1- 2% said they had 'no interest'.

Community Outreach Series Plan

Community outreach events will begin with “Introducing the Green School” on March 26, 2014 and will be held approximately monthly depending on venue availability and founders’ schedules. Attempts will be made to shift the venue and time offered in order to provide a variety of time slots. Each outreach event will cover a specific topic with the intention of informing community members about components of our school model and curriculum.

Potential topics:

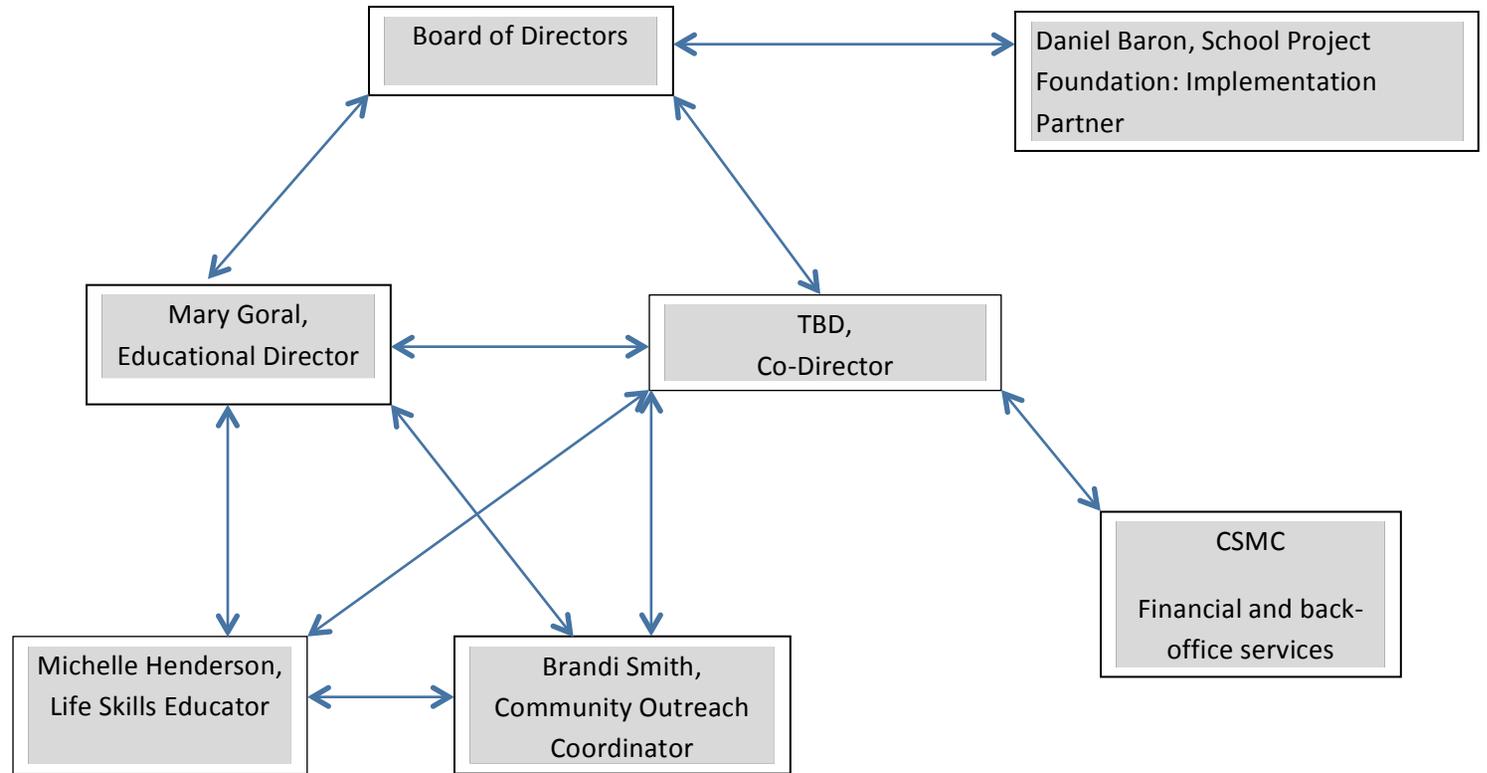
- Introducing The Green School: Who We Are and How We are Different
 - This outreach event will highlight the basics of the TGS model including overall methods for providing holistic education, Education for Sustainability programming, parent and community involvement, and the some of the differences between public charter schools and traditional public schools.
- Deep Integration of the Arts I & II
- Education for Sustainability I & II
- Cultivating Leadership (Activism through service, Social Justice)
- Social-emotional Learning
- Place Based Education: Creating Community through Stewardship and Outdoor Learning
- A Conversation about Funding
 - How charter schools are funded
 - Budget transparency
- Supporting Learning Through Technology

Attachment 14

Faculty and Staff Organizational Chart I

Year 1	Year Four: Full Capacity
Teachers	
<ul style="list-style-type: none"> • 6 Full-time Classroom Teachers • 2 Full-time Teaching Aides • 2 Half-time Special Area Teachers • 1 Full-time Special Education Teacher 	<ul style="list-style-type: none"> • 9 Full-time Classroom Teachers • 5 Full-time Teaching Aides • 3 Full-time Special Area Teachers • 2 Full-time Special Education Teachers
Administration	
<ul style="list-style-type: none"> • 1 Full-time Educational Director • 1 Full-Time Co-Director • 1 Half-time Community Outreach Coordinator • 1 Half-time Life Skills Educator • 1 (.2) Time Special Education Coordinator 	<ul style="list-style-type: none"> • 1 Full-time Educational Director • 1 Full-Time Co-Director • 1 Full-time Community Outreach Coordinator • 1 Full-time Life Skills Educator • 1 Half- Time Special Education Coordinator
Support Staff	
<ul style="list-style-type: none"> • 1 Full-time Nurse • 1 Full-time Front Office • 1 Part-time Custodian • 1 (.2) Time IT Support Staff 	<ul style="list-style-type: none"> • 1 Full-time Nurse • 1 Full-time Front Office • 1 Part-time Custodian • 1 (.2) Time IT Support

The Green School Organizational Chart II



Attachment 15 Start-Up Plan

Task	By Whom	By When	Communications
Apply for the INDOE Charter School Planning Grant	School Director/ Founders	April 30, 2014	Grant proposal and award letter
Approved Architectural Plan	Certified Architectural Firm Triangle Designs or Kirkwood Designs	May 1, 2014	Certified Plan
Recruit Students	Founding group	May 2014-March 2015	Press releases, public service announcements, the school website, brochures, broadcast news
Secure Funding for Building Purchase, Renovation and new Construction	The Founding Group/Board of Directors	June 1, 2014	Closing Paperwork notarized
Fall Festival	The Founding Group/Board of Directors	October 11, 2014	Press releases, public service announcements, the school website, brochures, broadcast news
Refined Professional development plan	School Leadership Team	January 3, 2015	Written plan approved by school board
Recruit faculty and staff	School Director and Founding Group	February 1, 2015	Letters of employment school board minutes
Student Lottery	School Founders and Board of Directors	March 8, 2015	Open meeting Enrollment list Waiting list
Complete Renovation of the Existing Building	Chosen Construction Firm from the Bid Process	March 15, 2015	Building Permit Occupancy Permit
Transportation Plan	Education Director	May 1, 2015	Proposed contract for board approval
Family Handbook	Education Director	May 15, 2015	On School Website Distributed to all families
Refine and Complete the 1 st Year's Curriculum	Education Director and Faculty	June 1, 2015	School Leaders, Founders and Faculty

Purchase equipment, materials and supplies	The School Leadership Team/Board of Directors	June 1, 2015	Purchase orders and financial records approved by the board
Teacher Development	Kentahten Teacher Training	June 15-26-2015	Teacher contract
Summer Festival	The Founding Group/Board of Directors	June 22, 2015	Press releases, public service announcements, the school website, brochures, broadcast news
Complete Addition	The Founding Group/Board of Directors	July 1, 2015	Building Permit, Certificate of Occupancy
Hire all Para-Professionals	The School The Founding Group	July 1, 2015	Board Approval
Power School Training	Charter School Management Corporation	July 15, 2015	
Intensive Professional Development	Teacher's College, Project Zero at Harvard Univ., Responsive Classroom, School Project Foundation CFGs	August 1, 2015	Certificates of Completion
Pool Party	The Entire School Community	August 1, 2015	Receipt from the City of Bloomington
Open House	All Students and Families	August 3, 2015	All students settled into their classrooms
First day of school	Everyone	August 3, 2015	Community wide celebration



February 11, 2014

Dr. Mary Goral
The Green School
2517 Country Club Rd.
Nashville, IN 47448

Dear Dr. Goral:

Dezelan Insurance Agency, Inc. has reviewed the insurance requirements contained within the charter school proposal documents for the Indiana Charter School Board. Provided The Green School receives a charter and we are fortunate enough to work with you as your insurance agent, Dezelan Insurance Agency, Inc. will ensure the school meets the guidelines as described in the following paragraphs.

General Liability will be offered at \$1,000,000 per occurrence and \$2,000,000 in the aggregate. Automobile Liability, will be offered as Hired and Non-Owned Auto with a combined single limit of \$1,000,000, unless the school purchases autos. Sexual Molestation and Misconduct coverage will be offered at a \$1,000,000 limit that is separate of the General Liability Limits. School Leaders Errors and Omissions would also be offered at separate \$1,000,000 and an aggregate limit of \$2,000,000. Finally, Employee Benefits Liability and Employment Practices Liability would be offered at \$1,000,000 limits. Workers Compensation and Employers Liability will be offered at \$500,000 each accident, each employee and policy limit.

In addition to these underlying liability limits, umbrella liability of \$4,000,000 would be procured in order to meet authorizer requirements.

A separate policy will be procured offering coverage for student accidents at a \$25,000 per occurrence limit, also an authorizer requirement. This is in excess of the state's requirement, but strongly recommended by our office.

All business personal property, computers, and any improvements to your building will be insured at full replacement cost with a deductible that meets the school's needs. Employee Dishonesty coverage will be procured at \$250,000 as well as a bond for the treasurer.

Providing a cost estimate at this point is somewhat challenging due to a changing market place and because our staff has not reviewed your budget and proposal. However, based on the estimated number of students and teachers you have communicated, we would estimate an annual premium between \$20,000 and \$25,000, which will be impacted by many factors.

Certificates of Insurance, in a form satisfactory to the Chartering Authority, showing evidence of coverage will be provided to the Chartering Authority prior to the commencement of performance of a Charter Agreement. Throughout the term of this Charter Agreement the sponsor will be provided updated certificates of insurance upon expiration of the current certificates.

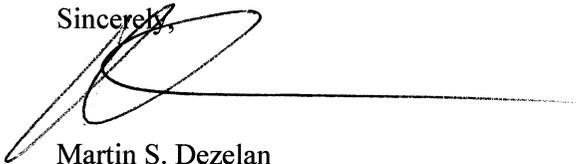
February 11, 2014

Dr. Mary Goral
The Green SchoolPage 2

Our agency is also prepared to assist you in procuring small group health insurance for your employees as well as a 403(b) retirement plan that can act as a compliment or alternative to the Teachers Retirement and Public Employee Retirement Funds.

Should you or anyone within the chartering authority have any questions regarding The Green School's ability to meet these coverage requirements, please feel free to contact me via phone or by e-mail.

Sincerely,

A handwritten signature in black ink, appearing to read "Martin S. Dezelan", is written over a horizontal line that extends across the page.

Martin S. Dezelan
President

INDIANA CHARTER SCHOOL BOARD

5-Year Pro Forma Budget Submission Template Spring 2014

|General Instructions for New School Applicants

- Complete the School Enrollment Projection tab in ORANGE
 - Complete the Year 0 - Budget and Cash Flow tab in PURPLE
 - Complete ALL FIVE annual budget tabs in BLUE
 - Complete ALL FIVE staffing tabs in GREEN
 - Enter information into the WHITE cells
 - Do not enter information into the GREY cells
- NOTE: Applicants proposing to operate a network of schools should add a worksheet or attach a separate file reflecting the consolidated network's 5-Year pro-forma budget, reflecting all components - including the regional back office/central office - of the Indiana network.
- We encourage applicants to contact the Indiana Department of Education Office of School Finance to learn more about Indiana's funding formula and all grant and operating funds available. Visit <http://www.doe.in.gov/idoefinance> for more information.

School Name: The Green School							
	Year 0	Year 1	Year 2	Year 3	Year 4	Year 5	
REVENUE							
State Revenue							
Basic Grant		\$ 850,626	\$ 980,658	\$ 1,105,272	\$ 1,186,542	\$ 1,246,140	
State Matching Funds for School Lunch Program		\$ -	\$ -	\$ -	\$ -	\$ -	
Professional Development		\$ -	\$ -	\$ -	\$ -	\$ -	
Technology Grants		\$ -	\$ -	\$ -	\$ -	\$ -	
Remediation Program		\$ -	\$ -	\$ -	\$ -	\$ -	
Full-Day Kindergarten		\$ 61,200	\$ 61,200	\$ 61,200	\$ 61,200	\$ 61,200	
Gifted and Talented Program		\$ -	\$ -	\$ -	\$ -	\$ -	
Textbook Reimbursement		\$ 30,000	\$ 30,000	\$ 30,000	\$ 30,000	\$ 30,000	
Summer School		\$ -	\$ -	\$ -	\$ -	\$ -	
Other State Revenue (please describe)		\$ 49,970	\$ 57,609	\$ 64,930	\$ 69,704	\$ 73,205	
Other State Revenue (please describe)		\$ -	\$ -	\$ -	\$ -	\$ -	
Federal Revenue							
Public Charter School Program (PCSP) Grant	\$ 220,000	\$ 245,000	\$ 245,000				
Facilities Assistance Program Grant		\$ -	\$ -				
Public Law 101-476 (IDEA)		\$ -	\$ -	\$ -	\$ -	\$ -	
Title I		\$ 68,609	\$ 79,097	\$ 89,148	\$ 95,703	\$ 100,510	
Title II		\$ -	\$ -	\$ -	\$ -	\$ -	
Federal Lunch Program		\$ -	\$ -	\$ -	\$ -	\$ -	
Federal Breakfast Reimbursement		\$ -	\$ -	\$ -	\$ -	\$ -	
Other Revenue Federal sources (please describe)	\$ -	\$ 19,988	\$ 23,044	\$ 25,972	\$ 27,882	\$ 29,282	
Other Revenue Federal sources (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Other Revenue Federal sources (please describe)		\$ -	\$ -	\$ -	\$ -	\$ -	
Other Revenues							
Committed Philanthropic Donations	\$ -	\$ 25,000	\$ 25,000	\$ 35,000	\$ 45,000	\$ 50,000	
Before and After Care Fees		\$ -	\$ -	\$ -	\$ -	\$ -	
Interest Income		\$ -	\$ -	\$ -	\$ -	\$ -	
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Total Revenue	\$ 220,000	\$ 1,350,393	\$ 1,501,608	\$ 1,411,522	\$ 1,516,031	\$ 1,590,337	
EXPENDITURES							
Personnel Expenses							
Wages, Benefits and Payroll Taxes	\$ 98,038	\$ 645,915	\$ 690,603	\$ 761,556	\$ 846,753	\$ 890,729	
Substitute Teachers		\$ -	\$ -	\$ -	\$ -	\$ -	
Professional Development	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Bonuses		\$ -	\$ -	\$ -	\$ -	\$ -	
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Total Personnel Expenses	\$ 98,038	\$ 645,915	\$ 690,603	\$ 761,556	\$ 846,753	\$ 890,729	
Instructional Supplies and Resources							

Textbooks	\$ -	\$ 40,000	\$ 57,230	\$ 57,230	\$ 57,230	\$ 57,230	\$ 57,230
Library, periodicals, etc	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Technology	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Assessment materials	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Computers	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Software	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other classroom supplies	\$ -	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000
Field trips, other unclassified items	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Co-curricular & Athletics	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ 3,000	\$ 42,450	\$ 43,724	\$ 45,035	\$ 46,386	\$ 47,778	\$ 47,778
Other (please describe)	\$ -	\$ 12,500	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Instructional Supplies and Resources	\$ 3,000	\$ 99,950	\$ 110,954	\$ 112,265	\$ 113,616	\$ 115,008	\$ 115,008
Support Supplies and Resources							
Administrative Computers	\$ -	\$ 18,000	\$ 19,000	\$ 20,000	\$ 21,000	\$ 22,000	\$ 22,000
Administrative Software	\$ 2,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Administration Dues, fees, misc expenses	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Office supplies	\$ -	\$ 3,500	\$ 3,605	\$ 3,713	\$ 3,825	\$ 3,939	\$ 3,939
Professional Expenses	\$ -	\$ 71,239	\$ 74,740	\$ 76,983	\$ 79,292	\$ 81,671	\$ 81,671
Community Relations	\$ -	\$ 6,700	\$ 5,000	\$ 5,150	\$ 5,305	\$ 5,464	\$ 5,464
Technology Supplies/Materials/Equipment	\$ -	\$ 35,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000
Other (please describe)	\$ -	\$ 1,200	\$ 1,236	\$ 1,273	\$ 1,200	\$ 1,351	\$ 1,351
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Support Supplies and Resources	\$ 2,000	\$ 135,639	\$ 113,581	\$ 117,119	\$ 120,622	\$ 124,425	\$ 124,425
Board Expenses							
Charter Board Services, including Board Training, retreats	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Charter Board Supplies & Equipment	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Charter Board Dues, fees, etc	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Board Expenses	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Professional Purchased or Contracted Services							
Legal Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Audit Services (compliant with SBOA requirements)	\$ -	\$ -	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000
Payroll Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Accounting Services	\$ 8,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Printing/Newsletter/Annual Report Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Consultants	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Internet Services	\$ -	\$ 4,800	\$ 4,800	\$ 4,800	\$ 4,800	\$ 4,800	\$ 4,800
Telephone/Telecommunication Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Insurance Costs (per ICSB requirements detailed in charter school application)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

Postage	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Special Education Services	\$ -	\$ 15,800	\$ 16,274	\$ 16,762	\$ 17,265	\$ 17,265	\$ 17,265
Student Information Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Food service	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Transportation	\$ -	\$ 50,000	\$ 60,000	\$ 60,000	\$ 60,000	\$ 60,000	\$ 60,000
Nursing Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Professional Development	\$ 50,000	\$ 18,000	\$ 18,540	\$ 19,096	\$ 19,669	\$ 20,259	\$ 20,259
Technology Services	\$ 10,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Professional Purchased or Contracted Services	\$ 68,500	\$ 88,600	\$ 109,614	\$ 110,658	\$ 111,734	\$ 112,324	\$ 112,324
Facilities							
Rent, mortgage, or other facility cost	\$ -	\$ 125,471	\$ 125,471	\$ 125,471	\$ 125,471	\$ 125,471	\$ 125,471
Furniture & Equipment	\$ -	\$ 132,000	\$ 135,960	\$ 81,576	\$ 84,023	\$ 84,023	\$ 84,023
Gas/electric	\$ -	\$ 32,200	\$ 34,920	\$ 37,858	\$ 41,030	\$ 43,172	\$ 43,172
Water/Sewer	\$ -	\$ 3,600	\$ 3,600	\$ 3,600	\$ 3,600	\$ 3,600	\$ 3,600
Grounds Keeping	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Maintenance Services	\$ 2,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Custodial	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Waste disposal	\$ -	\$ 1,800	\$ 1,800	\$ 1,800	\$ 1,800	\$ 1,800	\$ 1,800
Debt Service for Facilities (Interest Only)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Professional Services	\$ 1,600	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Insurance	\$ -	\$ 14,000	\$ 15,680	\$ 17,562	\$ 19,669	\$ 21,636	\$ 21,636
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Facilities	\$ 4,100	\$ 309,071	\$ 317,431	\$ 267,867	\$ 275,593	\$ 279,702	\$ 279,702
Other							
Contingency	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Indiana Charter School Board Administrative Fee	\$ -	\$ 25,519	\$ 29,420	\$ 33,158	\$ 35,596	\$ 37,384	\$ 37,384
CMO/EMO Fee	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Common School Fund Loan Interest Costs	\$ 5,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Other	\$ 5,000	\$ 25,519	\$ 29,420	\$ 33,158	\$ 35,596	\$ 37,384	\$ 37,384
Total Expenditures	\$ 180,638	\$ 1,304,693	\$ 1,371,603	\$ 1,402,623	\$ 1,503,914	\$ 1,559,572	\$ 1,559,572
Carryover/Deficit	\$ 39,362	\$ 45,700	\$ 130,005	\$ 8,899	\$ 12,117	\$ 30,765	\$ 30,765
Cumulative Carryover/(Deficit)	\$ 39,362	\$ 85,062	\$ 215,067	\$ 223,966	\$ 236,082	\$ 266,847	\$ 266,847

Expected New School Annual Operating Budget and Cash Flow Projections -- YEAR 0 -- Pre-Opening Period

		Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	TOTAL FIRST HALF 2014	Jul-14	Aug-14	Sep-14	Oct-14	Nov-14	Dec-14	TOTAL SECOND HALF 2014
REVENUE															
Federal Revenue															
Public Charter School Program (PCSP) Grant (NOTE: this is a competitive grant. Funding is not guaranteed.)				22,000.00	22,000.00	22,000.00	22,000.00	88,000.00	22,000.00	22,000.00	22,000.00	22,000.00	22,000.00	22,000.00	132,000.00
State categorical SPED								-							-
Federal categorical SPED								-							-
Other Revenues															
Committed Philanthropic Donations								-							-
Title I								-							-
Textbook Reimb& E-Rate								-							-
Federal Grant								-							-
Other (please describe)								-							-
Total Revenue		-	-	22,000.00	22,000.00	22,000.00	22,000.00	88,000.00	22,000.00	22,000.00	22,000.00	22,000.00	22,000.00	22,000.00	132,000.00
EXPENDITURES															
Personnel Expenses															
Education Director & Op. Manager				9,803.77	9,803.77	9,803.77	9,803.77	39,215.09	9,803.77	9,803.77	9,803.77	9,803.77	9,803.77	9,803.77	58,822.65
Teachers								-							-
Teacher Specialist								-							-
Title I Instructional Coach								-							-
Admin. Assistant								-							-
Social Worker								-							-
Custodian								-							-
Total Personnel Expenses		-	-	9,803.77	9,803.77	9,803.77	9,803.77	39,215.09	9,803.77	9,803.77	9,803.77	9,803.77	9,803.77	9,803.77	58,822.65
Instructional Supplies and Resources															
Textbooks								-							-
Library, periodicals, etc								-							-
Technology								-							-
Assessment materials								-							-
Computers								-							-
Software								-							-
Other classroom supplies								-							-
Field trips, other unclassified items								-							-
Co-curricular & Athletics								-							-
Supplies								-	500.00	500.00	500.00	500.00	500.00	500.00	3,000.00
Other (please describe)								-							-
Other (please describe)								-							-
Other (please describe)								-							-
Other (please describe)								-							-
Total Instructional Supplies and Resources		-	-	-	-	-	-	-	500.00	500.00	500.00	500.00	500.00	500.00	3,000.00
Support Supplies and Resources															
Administrative Computers								-							-
Administrative Software								-	2,000.00						2,000.00
Administration Dues, fees, misc expenses								-							-
Office supplies								-							-
Other (please describe)								-							-
Other (please describe)								-							-
Other (please describe)								-							-
Other (please describe)								-							-
Other (please describe)								-							-
Total Support Supplies and Resources		-	-	-	-	-	-	-	2,000.00	-	-	-	-	-	2,000.00
Board Expenses															
Charter Board Services, including Board Training, retreats								-							-
Charter Board Supplies & Equipment								-							-
Charter Board Dues, fees, etc								-							-
Other (please describe)								-							-
Other (please describe)								-							-
Other (please describe)								-							-
Other (please describe)								-							-
Other (please describe)								-							-
Total Board Expenses		-	-	-	-	-	-	-	-	-	-	-	-	-	-
Professional Purchased or Contracted Services															
Legal Services								-							-
Audit Services (compliant with SBOA requirements)								-							-
Payroll Services								-							-
Accounting Services				850.00	850.00	850.00	850.00	3,400.00	850.00	850.00	850.00	850.00	850.00	850.00	5,100.00
Printing/Newsletter/Annual Report Services								-							-
Consultants								-							-
Internet Services								-							-
Telephone/Telecommunication Services								-							-

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			-		-
TOTAL			100,000	17,650	117,650

Expected New School Annual Operating Budget -- YEAR 1 -- Fiscal Year July 1-June 30

REVENUE	Amount	Notes
State Revenue		
Basic Grant	\$ 850,626	
State Matching Funds for School Lunch Program		
Professional Development		
Technology Grants		
Remediation Program		
Full-Day Kindergarten	\$ 61,200	Each full-day Kindergarten student counts as one-half of a student (0.5) for purposes of ADM funding. In addition, schools are eligible for an annual grant of \$2,448 per full-day Kindergarten student.
Gifted and Talented Program		
Textbook Reimbursement	\$ 30,000	
Summer School		
State Categorical SPED	\$ 49,970	
Other State Revenue (please describe)		
Federal Revenue		
Public Charter School Program (PCSP) Grant	\$ 245,000	NOTE: This is a competitive grant for planning & implementation. Funding is not guaranteed.
Charter School Facilities Assistance Program Grant		
Public Law 101-476 (IDEA)		
Title I	\$ 68,609	
Title II		
Federal Lunch Program		
Federal Breakfast Reimbursement		
Federal Categorical SPED	\$ 19,988	
Other Revenue Federal sources (please describe)		
Other Revenue Federal sources (please describe)		
Other Revenues		
Committed Philanthropic Donations	\$ 25,000	
Before and After Care Fees		
Interest Income		
Other (please describe)		
Total Revenue	\$ 1,350,393	
EXPENDITURES		
Personnel Expenses		
Wages, Benefits and Payroll Taxes	\$ 645,915	Use staffing workbook
Substitute Teachers		
Professional Development		
Bonuses		
Other (please describe)		
Total Personnel Expenses	\$ 645,915	
Instructional Supplies and Resources		
Textbooks	\$ 40,000	
Library, periodicals, etc		
Technology		
Assessment materials		
Computers		
Software		
Other classroom supplies	\$ 5,000	
Field trips, other unclassified items		
Co-curricular & Athletics		
Professional Services	\$ 42,450	
Training Expenses	\$ 12,500	

Other (please describe)		
Other (please describe)		
Other (please describe)		
Total Instructional Supplies and Resources	\$	99,950
Support Supplies and Resources		
Administrative Computers	\$	18,000
Administrative Software		
Administration Dues, fees, misc expenses		
Office supplies	\$	3,500
Professional Expenses	\$	71,239
Community Relations	\$	6,700
Technology Supplies/Materials/Equipment	\$	35,000
Other (please describe)	\$	1,200
Other (please describe)		
Total Support Supplies and Resources	\$	135,639
Board Expenses		
Charter Board Services, including Board Training, retreats		
Charter Board Supplies & Equipment		
Charter Board Dues, fees, etc		
Other (please describe)		
Total Board Expenses	\$	-
Professional Purchased or Contracted Services		
Legal Services		
Audit Services (compliant with SBOA requirements)		
Payroll Services		
Accounting Services		
Printing/Newsletter/Annual Report Services		
Consultants		
Internet Services	\$	4,800
Telephone/Telecommunication Services		
Total Insurance Costs (per ICSB requirements detailed in charter school application)		
Travel		
Postage		
Special Education Services	\$	15,800
Student Information Services		
Food service		
Transportation	\$	50,000
Nursing Services		
Technology Professional Services	\$	18,000
Other (please describe)		
Other (please describe)		
Other (please describe)		
Total Professional Purchased or Contracted Services	\$	88,600
Facilities		
Rent, mortgage, or other facility cost	\$	125,471
Furniture & Equipment	\$	132,000
Gas/electric	\$	32,200
Water/ Sewer	\$	3,600
Grounds Keeping		
Maintenance Services		
Custodial		
Waste disposal	\$	1,800
Debt Service for Facilities (Interest Only)		
Professional Services		
Insurance	\$	14,000
Other (please describe)		
Other (please describe)		
Total Facilities	\$	309,071

Other		
Contingency		
Indiana Charter School Board Administrative Fee	\$ 25,519	Assume 3% of Basic Grant (Row 6)
CMO/EMO Fee		Be certain to reflect the full amount of any fee, including the management fee and any pass-through fees. If pass-through fees are reflected elsewhere in the budget, please clearly indicate this in the Budget Narrative.
Common School Fund Loan Interest Costs		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Total Other	\$ 25,519	
Total Expenditures	\$ 1,304,693	
Carryover/Deficit	\$ 45,700	

Cumulative Carryover/(Deficit) \$ 45,700

Expected New School Annual Operating Budget -- YEAR 2 -- Fiscal Year July 1-June 30

REVENUE	Amount	Notes
State Revenue		
Basic Grant	\$ 980,658	
State Matching Funds for School Lunch Program		
Professional Development		
Technology Grants		
Remediation Program		
Full-Day Kindergarten	\$ 61,200	Each full-day Kindergarten student counts as one-half of a student (0.5) for purposes of ADM funding. In addition, schools are eligible for an annual grant of \$2,448 per full-day Kindergarten student.
Gifted and Talented Program		
Textbook Reimbursement	\$ 30,000	
Summer School		
State Categorical SPED	\$ 57,609	
Other State Revenue (please describe)		
Federal Revenue		
Public Charter School Program (PCSP) Grant	\$ 245,000	NOTE: This is a competitive grant for planning & implementation. Funding is not guaranteed.
Charter School Facilities Assistance Program Grant		
Public Law 101-476 (IDEA)		
Title I	\$ 79,097	
Title II		
Federal Lunch Program		
Federal Breakfast Reimbursement		
Federal Categorical SPED	\$ 23,044	
Other Revenue Federal sources (please describe)		
Other Revenue Federal sources (please describe)		
Other Revenues		
Committed Philanthropic Donations	\$ 25,000	
Before and After Care Fees		
Interest Income		
Other (please describe)		
Total Revenue	\$ 1,501,608	
EXPENDITURES		
Personnel Expenses		
Wages, Benefits and Payroll Taxes	\$ 690,603	Use staffing workbook
Substitute Teachers		
Professional Development		
Bonuses		
Other (please describe)		
Total Personnel Expenses	\$ 690,603	
Instructional Supplies and Resources		
Textbooks	\$ 57,230	
Library, periodicals, etc		
Technology		
Assessment materials		
Computers		
Software		
Other classroom supplies	\$ 5,000	
Field trips, other unclassified items		
Co-curricular & Athletics		
Professional Services	\$ 43,724	
Training Expenses	\$ 5,000	

Other (please describe)		
Other (please describe)		
Other (please describe)		
Total Instructional Supplies and Resources	\$	110,954
Support Supplies and Resources		
Administrative Computers	\$	19,000
Administrative Software		
Administration Dues, fees, misc expenses		
Office supplies	\$	3,605
Professional Expenses	\$	74,740
Community Relations	\$	5,000
Technology Supplies/Materials/Equipment	\$	10,000
Other (please describe)	\$	1,236
Other (please describe)		
Total Support Supplies and Resources	\$	113,581
Board Expenses		
Charter Board Services, including Board Training, retreats		
Charter Board Supplies & Equipment		
Charter Board Dues, fees, etc		
Other (please describe)		
Total Board Expenses	\$	-
Professional Purchased or Contracted Services		
Legal Services		
Audit Services (compliant with SBOA requirements)	\$	10,000
Payroll Services		
Accounting Services		
Printing/Newsletter/Annual Report Services		
Consultants		
Internet Services	\$	4,800
Telephone/Telecommunication Services		
Total Insurance Costs (per ICSB requirements detailed in charter school application)		
Travel		
Postage		
Special Education Services	\$	16,274
Student Information Services		
Food service		
Transportation	\$	60,000
Nursing Services		
Technology Professional Services	\$	18,540
Other (please describe)		
Other (please describe)		
Other (please describe)		
Total Professional Purchased or Contracted Services	\$	109,614
Facilities		
Rent, mortgage, or other facility cost	\$	125,471
Furniture & Equipment	\$	135,960
Gas/electric	\$	34,920
Water/ Sewer	\$	3,600
Grounds Keeping		
Maintenance Services		
Custodial		
Waste disposal	\$	1,800
Debt Service for Facilities (Interest Only)		
Professional Services		
Insurance	\$	15,680
Other (please describe)		
Other (please describe)		
Total Facilities	\$	317,431

Other		
Contingency		
Indiana Charter School Board Administrative Fee	\$ 29,420	Assume 3% of Basic Grant (Row 6)
CMO/EMO Fee		Be certain to reflect the full amount of any fee, including the management fee and any pass-through fees. If pass-through fees are reflected elsewhere in the budget, please clearly indicate this in the Budget Narrative.
Common School Fund Loan Interest Costs		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Total Other	\$ 29,420	
Total Expenditures	\$ 1,371,603	
Carryover/Deficit	\$ 130,005	

Cumulative Carryover/(Deficit) \$ 175,705

Expected New School Annual Operating Budget -- YEAR 3 -- Fiscal Year July 1-June 30

REVENUE	Amount	Notes
State Revenue		
Basic Grant	\$ 1,105,272	
State Matching Funds for School Lunch Program		
Professional Development		
Technology Grants		
Remediation Program		
Full-Day Kindergarten	\$ 61,200	Each full-day Kindergarten student counts as one-half of a student (0.5) for purposes of ADM funding. In addition, schools are eligible for an annual grant of \$2,448 per full-day Kindergarten student.
Gifted and Talented Program		
Textbook Reimbursement	\$ 30,000	
Summer School		
State Categorical SPED	\$ 64,930	
Other State Revenue (please describe)		
Federal Revenue		
Public Law 101-476 (IDEA)		
Title I	\$ 89,148	
Title II		
Federal Lunch Program		
Federal Breakfast Reimbursement		
Federal Categorical SPED	\$ 25,972	
Other Revenue Federal sources (please describe)		
Other Revenue Federal sources (please describe)		
Other Revenues		
Committed Philanthropic Donations	\$ 35,000	
Before and After Care Fees		
Interest Income		
Other (please describe)		
Total Revenue	\$ 1,411,522	
EXPENDITURES		
Personnel Expenses		
Wages, Benefits and Payroll Taxes	\$ 761,556	Use staffing workbook
Substitute Teachers		
Professional Development		
Bonuses		
Other (please describe)		
Total Personnel Expenses	\$ 761,556	
Instructional Supplies and Resources		
Textbooks	\$ 57,230	
Library, periodicals, etc		
Technology		
Assessment materials		
Computers		
Software		
Other classroom supplies	\$ 5,000	
Field trips, other unclassified items		
Co-curricular & Athletics		
Professional Services	\$ 45,035	
Training Expenses	\$ 5,000	
Other (please describe)		
Other (please describe)		
Other (please describe)		

Total Instructional Supplies and Resources	\$	112,265
Support Supplies and Resources		
Administrative Computers	\$	20,000
Administrative Software		
Administration Dues, fees, misc expenses		
Office supplies	\$	3,713
Professional Expenses	\$	76,983
Community Relations	\$	5,150
Technology Supplies/Materials/Equipment	\$	10,000
Other (please describe)	\$	1,273
Other (please describe)		
Total Support Supplies and Resources	\$	117,119
Board Expenses		
Charter Board Services, including Board Training, retreats		
Charter Board Supplies & Equipment		
Charter Board Dues, fees, etc		
Other (please describe)		
Total Board Expenses	\$	-
Professional Purchased or Contracted Services		
Legal Services		
Audit Services (compliant with SBOA requirements)	\$	10,000
Payroll Services		
Accounting Services		
Printing/Newsletter/Annual Report Services		
Consultants		
Internet Services	\$	4,800
Telephone/Telecommunication Services		
Total Insurance Costs (per ICSB requirements detailed in charter school application)		
Travel		
Postage		
Special Education Services	\$	16,762
Student Information Services		
Food service		
Transportation	\$	60,000
Nursing Services		
Technology Professional Services	\$	19,096
Other (please describe)		
Other (please describe)		
Other (please describe)		
Total Professional Purchased or Contracted Services	\$	110,658
Facilities		
Rent, mortgage, or other facility cost	\$	125,471
Furniture & Equipment	\$	81,576
Gas/electric	\$	37,858
Water/ Sewer	\$	3,600
Grounds Keeping		
Maintenance Services		
Custodial		
Waste disposal	\$	1,800
Debt Service for Facilities (Interest Only)		
Professional Services		
Insurance	\$	17,562
Other (please describe)		
Other (please describe)		
Total Facilities	\$	267,867
Other		
Contingency		

Indiana Charter School Board Administrative Fee	\$ 33,158	Assume 3% of Basic Grant (Row 6)
CMO/EMO Fee		Be certain to reflect the full amount of any fee, including the management fee and any pass-through fees. If pass-through fees are reflected elsewhere in the budget, please clearly indicate this in the Budget Narrative.
Common School Fund Loan Interest Costs		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Total Other	\$ 33,158	
Total Expenditures	\$ 1,402,623	
Carryover/Deficit	\$ 8,899	

Cumulative Carryover/(Deficit) \$ 184,603

Expected New School Annual Operating Budget -- YEAR 4 -- Fiscal Year July 1-June 30

REVENUE	Amount	Notes
State Revenue		
Basic Grant	\$ 1,186,542	
State Matching Funds for School Lunch Program		
Professional Development		
Technology Grants		
Remediation Program		
Full-Day Kindergarten	\$ 61,200	Each full-day Kindergarten student counts as one-half of a student (0.5) for purposes of ADM funding. In addition, schools are eligible for an annual grant of \$2,448 per full-day Kindergarten student.
Gifted and Talented Program		
Textbook Reimbursement	\$ 30,000	
Summer School		
State Categorical SPED	\$ 69,704	
Other State Revenue (please describe)		
Federal Revenue		
Public Law 101-476 (IDEA)		
Title I	\$ 95,703	
Title II		
Federal Lunch Program		
Federal Breakfast Reimbursement		
Federal Categorical SPED	\$ 27,882	
Other Revenue Federal sources (please describe)		
Other Revenue Federal sources (please describe)		
Other Revenues		
Committed Philanthropic Donations	\$ 45,000	
Before and After Care Fees		
Interest Income		
Other (please describe)		
Total Revenue	\$ 1,516,031	
EXPENDITURES		
Personnel Expenses		
Wages, Benefits and Payroll Taxes	\$ 846,753	Use staffing workbook
Substitute Teachers		
Professional Development		
Bonuses		
Other (please describe)		
Total Personnel Expenses	\$ 846,753	
Instructional Supplies and Resources		
Textbooks	\$ 57,230	
Library, periodicals, etc		
Technology		
Assessment materials		
Computers		
Software		
Other classroom supplies	\$ 5,000	
Field trips, other unclassified items		

Co-curricular & Athletics		
Professional Services	\$	46,386
Training Expenses	\$	5,000
Other (please describe)		
Other (please describe)		
Other (please describe)		
Total Instructional Supplies and Resources	\$	113,616
Support Supplies and Resources		
Administrative Computers	\$	21,000
Administrative Software		
Administration Dues, fees, misc expenses		
Office supplies	\$	3,825
Professional Expenses	\$	79,292
Community Relations	\$	5,305
Technology Supplies/Materials/Equipment	\$	10,000
Other (please describe)	\$	1,200
Other (please describe)		
Total Support Supplies and Resources	\$	120,622
Board Expenses		
Charter Board Services, including Board Training, retreats		
Charter Board Supplies & Equipment		
Charter Board Dues, fees, etc		
Other (please describe)		
Total Board Expenses	\$	-
Professional Purchased or Contracted Services		
Legal Services		
Audit Services (compliant with SBOA requirements)	\$	10,000
Payroll Services		
Accounting Services		
Printing/Newsletter/Annual Report Services		
Consultants		
Internet Services	\$	4,800
Telephone/Telecommunication Services (school application)		
Travel		
Postage		
Special Education Services	\$	17,265
Student Information Services		
Food service		
Transportation	\$	60,000
Nursing Services		
Technology Professional Services	\$	19,669
Other (please describe)		
Other (please describe)		
Other (please describe)		
Total Professional Purchased or Contracted Services	\$	111,734
Facilities		
Rent, mortgage, or other facility cost	\$	125,471
Furniture & Equipment	\$	84,023
Gas/electric	\$	41,030
Water/ Sewer	\$	3,600
Grounds Keeping		

Maintenance Services		
Custodial		
Waste disposal	\$	1,800
Debt Service for Facilities (Interest Only)		
Professional Services		
Insurance	\$	19,669
Other (please describe)		
Other (please describe)		
Total Facilities	\$	275,593
Other		
Contingency		
Indiana Charter School Board Administrative Fee	\$	35,596
		Assume 3% of Basic Grant (Row 6)
		Be certain to reflect the full amount of any fee, including the management fee and any pass-through fees. If pass-through fees are reflected elsewhere in the budget, please clearly indicate this in the Budget Narrative.
CMO/EMO Fee		
Common School Fund Loan Interest Costs		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Total Other	\$	35,596
Total Expenditures	\$	1,503,914
Carryover/Deficit	\$	12,117

Cumulative Carryover/(Deficit) \$ 196,720

Expected New School Annual Operating Budget -- YEAR 5 -- Fiscal Year July 1-June 30

REVENUE	Amount	Notes
State Revenue		
Basic Grant	\$ 1,246,140	
State Matching Funds for School Lunch Program		
Professional Development		
Technology Grants		
Remediation Program		
Full-Day Kindergarten	\$ 61,200	Each full-day Kindergarten student counts as one-half of a student (0.5) for purposes of ADM funding. In addition, schools are eligible for an annual grant of \$2,448 per full-day Kindergarten student.
Gifted and Talented Program		
Textbook Reimbursement	\$ 30,000	
Summer School		
State Categorical SPED	\$ 73,205	
Other State Revenue (please describe)		
Federal Revenue		
Public Law 101-476 (IDEA)		
Title I	\$ 100,510	
Title II		
Federal Lunch Program		
Federal Breakfast Reimbursement		
Federal Categorical SPED	\$ 29,282	
Other Revenue Federal sources (please describe)		
Other Revenue Federal sources (please describe)		
Other Revenues		
Committed Philanthropic Donations	\$ 50,000	
Before and After Care Fees		
Interest Income		
Other (please describe)		
Total Revenue	\$ 1,590,337	
EXPENDITURES		
Personnel Expenses		
Wages, Benefits and Payroll Taxes	\$ 890,729	Use staffing workbook
Substitute Teachers		
Professional Development		
Bonuses		
Other (please describe)		
Total Personnel Expenses	\$ 890,729	
Instructional Supplies and Resources		
Textbooks	\$ 57,230	
Library, periodicals, etc		
Technology		
Assessment materials		
Computers		
Software		
Other classroom supplies	\$ 5,000	
Field trips, other unclassified items		
Co-curricular & Athletics		
Professional Services	\$ 47,778	
Training Expenses	\$ 5,000	
Other (please describe)		
Other (please describe)		
Other (please describe)		

Total Instructional Supplies and Resources	\$	115,008	
Support Supplies and Resources			
Administrative Computers	\$	22,000	
Administrative Software			
Administration Dues, fees, misc expenses			
Office supplies	\$	3,939	
Professional Expenses	\$	81,671	
Community Relations	\$	5,464	
Technology Supplies/Materials/Equipment	\$	10,000	
Other (please describe)	\$	1,351	
Other (please describe)			
Total Support Supplies and Resources	\$	124,425	
Board Expenses			
Charter Board Services, including Board Training, retreats			
Charter Board Supplies & Equipment			
Charter Board Dues, fees, etc			
Other (please describe)			
Total Board Expenses	\$	-	
Professional Purchased or Contracted Services			
Legal Services			
Audit Services (compliant with SBOA requirements)	\$	10,000	
Payroll Services			
Accounting Services			
Printing/Newsletter/Annual Report Services			
Consultants			
Internet Services	\$	4,800	
Telephone/Telecommunication Services			
Total Insurance Costs (per ICSB requirements detailed in charter school application)			
Travel			
Postage			
Special Education Services	\$	17,265	
Student Information Services			
Food service			
Transportation	\$	60,000	
Nursing Services			
Technology Professional Services	\$	20,259	
Other (please describe)			
Other (please describe)			
Other (please describe)			
Total Professional Purchased or Contracted Services	\$	112,324	
Facilities			
Rent, mortgage, or other facility cost	\$	125,471	
Furniture & Equipment	\$	84,023	
Gas/electric	\$	43,172	
Water/ Sewer	\$	3,600	
Grounds Keeping			
Maintenance Services			
Custodial			
Waste disposal	\$	1,800	
Debt Service for Facilities (Interest Only)			
Professional Services			
Insurance	\$	21,636	
Other (please describe)			
Other (please describe)			
Total Facilities	\$	279,702	
Other			
Contingency			

Indiana Charter School Board Administrative Fee	\$ 37,384	Assume 3% of Basic Grant (Row 6)
CMO/EMO Fee		Be certain to reflect the full amount of any fee, including the management fee and any pass-through fees. If pass-through fees are reflected elsewhere in the budget, please clearly indicate this in the Budget Narrative.
Common School Fund Loan Interest Costs		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Total Other	\$ 37,384	
Total Expenditures	\$ 1,559,572	
Carryover/Deficit	\$ 30,765	

Cumulative Carryover/(Deficit) \$ 227,485

Attachment 18

Budget Narrative

The Green School will contract with CMSC for back office support. Dr. Mary Goral, proposed Education Director and Daniel Baron, School Project Foundation partner, have been working with Tim McConnell at CMCS on the financial and business management of the school. Most recently, Mr. McConnell has helped review and revise the TGS budget. In consultation with CSMC, TGS has identified its business management needs and has budgeted for CSMCs highest level of support for the first five years of operation.

Detailed description of assumptions and revenue estimates:

The estimates used in the budget are conservative in that we have underestimated revenues and overestimated expenditures. The Green School will open in the fall of 2015 with 165 students and will increase by 28.3 (27 year two, 28 year three, 30 year four) students each year until enrollment reaches 240, which will be in year four.

Revenue Assumptions Year One:

State Revenue includes the following:

Basic Grant: \$850,626

State Matching Funds for School Lunch Program: \$11,830

Full-day Kindergarten: \$61,200. (Each full-day kindergarten student counts as .5 students, for purposes of ADM funding. In addition, schools are eligible for an annual grant of \$2440 per full-day.

State Categorical SPED: \$49,970 (Assumes 15% SPED(50/50@Cat.1 \$1491 & Cat.2 1904) +25% New legislation)

Textbook reimbursement: \$30,000

Federal Revenue includes the following:

Federal Planning Grant: \$245,000 (This is a competitive grant for planning and implementation. Funding is not guaranteed.)

Federal Categorical SPED: \$19,988 (Assumes Federal SPED component equals 40% of total SPED funding)

Federal Lunch Program: \$16,562

Free and Reduced Lunch Program: \$34,522

Federal Breakfast Program: \$4,563

Title 1: \$68,609

Other Revenue

Philanthropic : \$25,000

Grand Total Revenue: \$1,417,870

Expenditures: Year One

Salaries

- Education Director: \$60,000
- Co-Director: \$40,000
- Community Education Coordinator (1/2 time): \$20,000
- Front Office: \$20,000
- Nurse (part time): \$11,520

- Six Classroom Teachers Average \$36,000: \$216,000
- One Special Education Teacher: \$36,000
- Special Ed Coordinator (.2): \$7,200
- Two Aides, \$11,520 each: \$23,040
- Two Specialized Teachers (1/2 time, \$20,000 each): \$40,000
- Life Skills Educator (1/2 time): \$20,000
- Tech Support (.25): \$9,000
- Custodian: \$15,000

TOTAL PERSONNEL EXPENSES: \$517,760

Benefits

Employee insurance will be provided for a cost of \$4,500 per employee, for all full-time and 2/3 time employees. Payroll taxes were calculated at 15.15%, 2.5% for SUI (on first \$9,500). This includes TRF/PERF, calculated at 7.5%. Total Benefits = \$128,155

TOTAL SALARY EXPENDITURES INCLUDING BENEFITS: \$645,915

Staffing Levels

The Green School will add one classroom teacher each year for three consecutive years, with the addition of 27 students year two, 28 the next year and 30 students year four, until max capacity is reached in year four. Each teacher will have an estimated 28 students per class. Each kindergarten and first grade classroom will have a full-time aide. The number of part-time specialized teachers will increase to three full time specialized teachers by year 5.

Instructional Supplies and Resources, Books and Supplies

- Textbooks: \$30,000
- Other Classroom Supplies: \$5,000
- Professional Services: \$42,450 (Professional Development)
- Training Expenses: \$12,500 (Instructional Program Improvements and Services)

TOTAL INSTRUCTIONAL SUPPLIES AND RESOURCES: \$89,950

Support Supplies and Resources

- Administrative Computers: \$18,000
- Office Supplies: \$3,500
- Professional Expenses: \$71,239 (This includes fees for back office support – CSMC, payroll through Paybridge and PowerSchool)
- Community Relations/marketing: \$6,700
- Technology Supplies/Materials/Equipment: \$35,000 (this includes materials for testing)
- Other (Repairs and Maintenance): \$1200

TOTAL SUPPORT SUPPLIES AND RESOURCES: \$135,639

Board Expenses

- Our Governing Board will be trained by Daniel Baron, Founder and Executive Director of the School Project Foundation. This training is a pro-bono training.

Professional Purchased or Contracted

- Transportation: \$50,000
- Food Service: \$33,800
- Technology Professional Services: \$18,000 (Supplies/Materials/Equipment OF WHICH 12K IS REIMBURSED BY PCSP)
- Payroll: (Payroll, provided by Paybridge, is included in Professional Expenses above)
- Accounting: (included above in Professional Expenses):

- Internet/Phone: \$4,800
 - Insurance: (included in Facilities expenses)
 - Special Education Services: \$15,800
- TOTAL PROFESSIONAL PURCHASED OR CONTRACTED: \$122,400

Facilities

- Rent/Mortgage: \$198,502 (14% of total revenue = \$16,500 per month)
 - Furniture and Equipment: \$132,000
 - Insurance: \$14,000
 - Utilities (including gas and electric): \$32,200
 - Water/Sewer: \$1,800
 - Maintenance/Custodial Services/Groundskeeping (included in Personnel – our custodian will do this work and the students will help with weeding and planting flowers as part of the EFS program)
- TOTAL FACILITIES: \$382,102

Other:

- Indiana Charter School Board Administrative Fee: \$25,519
- TOTAL OTHER: \$25,519

Grand Total Expenses: \$1,401,524

Carryover: \$16,346

Grades K- 5:

The Green School will reside in Monroe County and we anticipate over 95% of the school population will come from Monroe County. Because of this estimation of student population, the per-pupil payment for TGS is an average of \$5418 per student, with a full enrollment of 165 students in year one.

a. Anticipated Funding Sources

The Green School has been in discussions with Old National Bank and IFF and both financial institutions are interested in being the anticipated loan holder for any needed loans on the school.

b. Contingency plan to meet financial needs.

TGS will hire a Co-Director with experience in, and commitment to, fund development. The Education Director along with the Co-Director, Community Engagement Coordinator and Governing Board members will be expected to submit grant applications, plan fundraising events, and pursue private donors. CSMC, an expert in charter school budgets, will have an incredible influence in balancing budgets and keeping cash flow in the positive. In addition, should The Green School have cash flow challenges, the plan laid out in section 3d of this application shall be implemented.

c. Year 1 cash flow contingency, in the event that revenue projections are not met in advance of opening.

The Green School has budgeted based on what is reasonable, rather than the best-case scenario so we feel we have a conservative, realistic expectation for our income and needs. As witnessed in our budget for year one, we have no heavy dependence on philanthropic support, with a line item of \$25,000 in revenue in that area. Additionally, our expenditure assumptions are based on research including consulting CSMC and other local charters schools. Our Founders Group and Board includes members with financial expertise, including those with experience as a current charter school leader, grant writer, and a member who has several years of experience in developing and writing budgets. Should The Green School experience any decrease in expected revenue, the following plan(s) will be implemented:

- The Governing Board will put a freeze on all salary raises and even reduce salaries, as necessary until the budget can be balanced.
 - We will consider multi-age classrooms, which would allow for the same student/teacher ratio, but fewer teachers
 - Administrative staff and aides will be expected to fill in as substitute teachers as necessary.
 - TGS will actively fundraise from community sources.
 - The Governing Board will review staffing levels and eliminate jobs if necessary, if the enrollment numbers do not support the proposed staffing positions.
2. Annual audit of the financial and administrative operations of the school.

The Green School will compile and make available an annual written report and evaluation of its educational program and general operations in accordance with the approved charter and applicable state and federal laws. The annual report will include an evaluation of the fulfillment of the charter's purposes and goals, as well as an evaluation of financial operations. These evaluations will be implemented in the form of annual program and financial audits. The Green School Governing Board will work with CSMC and will appoint an audit sub-committee, composed of independent non-staff Green School members, to assist in fulfilling its fiscal oversight responsibilities. Duties of the committee will include:

- Overseeing the integrity of the proposed school's financial accounting process and systems of internal controls regarding finance, accounting and use of assets
- Assuring the independence and performance of the independent auditors, as well as of school employees responsible for financial operations
- Providing an avenue of communication among the proposed school's independent auditors, management, staff, and The Green School

The audit committee will have the authority to conduct any investigation appropriate to fulfilling its responsibilities, and it will have direct access to the independent auditors as well as to anyone in the organization. An independent auditor will conduct the yearly fiscal audit of The Green School. The audit will be conducted in accordance with generally accepted accounting principles applicable to the school and will verify the accuracy of the financial statements, attendance and enrollment accounting practices, accounting practices, and review the internal controls. A line-item for the audit expense is entered in the budget beginning in year two.

Financial Management Capacity

The Financial Management Capacity is handled by the Team's individual and collective qualifications for implementing the Financial Plan successfully.

The Founding Group

The TGS Founders Group has experience with budgets and financial management from a school level and from an outside contracted company. Two of the Founders Group members have extensive experience in grant writing and one of the founding group members has been responsible for developing and maintaining budgets for several years. The founding group realizes that the financial management of a charter school creates unique challenges and intricacies, so we have enlisted the help and services of community representatives with a diverse set of financial, legal, and business skills, as well as school finance experts and service providers.

The Governing Board

The Green School Governing Board oversees the school's financials. While school leadership and contracted business management consultants will hold primary responsibility for creating and maintaining a sound budget, they will report directly to the Governing Board, who will ultimately approve and be responsible for all of the school's budget and financial matters.

The Governing Board will be responsible for:

- Creating an annual operating budget for the school.
- Meeting monthly with school leadership to review the budget and address any concerns or issues, and planning for financial growth, development, and sustainability.
- Developing an annual financial timeline for the school.
- Developing The Green School finance manual.
- Ensuring proper accounting and reporting practices.
- Creating a systematic fundraising plan for the school.
- Reviewing and evaluating the school's relationship and contract with any outside accounting, bookkeeping, and other service providers.

The Green School's Administrative Management Team

The Co-Director, Front Office Support and Education Director will be responsible for the day-to-day financial management and reporting at the building level. The Education Director and Co-Director will work within the proposed budget and will make all budget decisions based on The Green School core beliefs, mission, and educational program. The Education Director and Co-Director will meet at least monthly with the Governing Board and will consult with that group as needed throughout the year. In addition, The Green School will have a contract with CSMC for bookkeeping and accounting. The Co-Director and will work closely with CSMC to build internal financial capacity for the school. There will be quarterly budget meetings to review the current year's budget, prepare for reporting and audits, and prepare the operating budget for the next fiscal year.

Attachment 19 Existing Non-Profit Financials

This attachment is not applicable. The Green School is not a pre-existing non-profit organization.

Appendix A

Description of Powerschool and CSMC's services

Some of the key features of CSMC's PowerSchool support include:

PowerSchool Hosting

With CSMC's PowerSchool Hosting solution, you have the security of knowing your data is being housed on dedicated and enterprise class servers. This includes daily backups of your data, regular software and server maintenance, and automatic updates to the latest version of PowerSchool.

Implementation and Conversion

CSMC observed that several of its clients did not have a positive experience setting up and implementing their student information system (SIS). For some, the lack of technology personnel and training was the problem. For others, it was trying to make a district-level system work for a charter school. With CSMC's implementation services, we can guarantee a smooth and complete set-up of your SIS to put you in a position for success throughout the year.

PowerSchool is the fastest-growing and most widely used web-based student information system supporting more than 10 million students across the world. If you are interested in switching over to PowerSchool from a different student information system, CSMC can handle the data conversion ensuring that no student information is lost during the process. We make the process of upgrading systems simple and efficient saving our clients time and cost.

40-Point Inspection

For new clients already using PowerSchool, CSMC will perform a comprehensive evaluation of your SIS as part of the on-boarding process. Our support staff thoroughly checks every major component of your system set-up to ensure it is functioning at the optimal level.

PowerSchool houses the data used for longitudinal reporting required for state and district funding, making the 40-point inspection an essential service that we provide our clients as part of our inclusive support package.

On-Going Training & Support

CSMC offers in-person administrative and teacher trainings led by our SIS experts throughout the year. We understand the challenge of getting staff and teachers together all at once so we also utilize online webinars to offer flexible training that works around your schedule. We customize trainings to target your school needs. In addition to monthly webinars, CSMC also publishes frequent client newsletters that include helpful training videos and other support resources. Our main goal is to set you up for success.

CSMC also provides on-going support through our customer-service Help Desk. Our dedicated support staff is available to answer all SIS and compliance-related questions. Our Help Desk staff knows your school and its setup and is able to help resolve a variety of issues that come up. The CSMC Help Desk is available to support anyone at your school providing specialized service across the entire spectrum of your organization. We are always just a phone call or email away.



CSMC

**COMMUNITY SCHOOLS
FISCAL PROCESS**

06/28/2013 version 1.3

FISCAL PROCEDURES

I. REQUESTING PURCHASE

To request a Purchase:

- School Staff to complete Requisition Form for ALL purchases
- Budgets should be checked by designated Staff Member prior to ordering
- Any expense over \$ 1,000 should be cleared by the School Treasurer prior to ordering
- Form to be signed by Requesting Staff member & Superintendent, Principal or Supervisor
- School staff to place order with vendor
- School staff to confirm that received order is complete and accurate
- School Staff Match packing slip to Requisition Form
- School Staff to deposit Form to appropriate School Dropbox folder
- CSMC will retain copy of Requisition Form & scan to Electronic Account (for viewing in Charter Vision CV)

When AP invoice is received/vendor payment is requested:

- School Staff review invoice for accuracy
- School Staff place in appropriate School Dropbox folder
- School Treasurer code, approve and move to Approved Folder
- CSMC add approved Invoice to Weekly Recap
- CSMC send out Weekly Recap (WR) to School Treasurer for Check Batch approval
- School Treasurer place WR into Approved Dropbox folder
- CSMC prepares check run
- School Treasurer signs checks
- Checks are mailed by CSMC upon return

Documents for the Electronic Accounting File:

- Signed Requisition Form
- Signed PO Form (if required)
- Vendor Invoice (vendor statements are not acceptable per State guidelines)
- Other supporting documentation (expense reports must include all receipts)
- Packing Slip

II. PREPARING DEPOSITS

CSMC assumes a supporting role in Preparing bank deposits:

- School Staff Member Prepare bank deposit slip.
- Verify that the total matches the total of the yellow receipts being deposited.
- Make copies of deposit slip and all checks being deposited.
- Deliver bank deposit to bank and collect bank receipt.

Documents to be assembled in the following order:

- Bank receipt
- Copy of deposit ticket
- Copies of checks deposited
- Other supporting documentation

EFT Deposits:

- Any funds automatically deposited to the school's bank account require that a receipt be issued- just as if you had collected the money to be deposited.
- Date the receipt for the date of deposit.
- Note on the receipt that it was an EFT deposit.
- Attach receipt to supporting documentation.
- Move to appropriate School Dropbox folder
-

III. BANK STATEMENTS

CSMC Receives cancelled checks:

- School Treasurer reviews canceled checks
- If the bank has images of the checks online, that will satisfy the OH requirement as long as the images include both front and back of the check and is legible.
- If relying on the online images, each check must be printed (front and back) and filed for examination during the audit.
- Images will not need to be printed if the Bank Statements are requested to be delivered to the Marion office with images included

When CSMC receives the bank statement:

- School Treasurer reviews the bank statement
- Review documents for reasonableness.
 - Do the checks have the appropriate signatures?
 - Are the checks written to known vendors?
 - Does anything appear unusual?
- Prepare a receipt for any interest earned (following the procedures as outlined for preparing deposits).
- If online access has not been provided to CSMC, fax bank statement to CSMC on the day it is received. (or email a 'screen shot')
- Mail hard copy of bank statement to CSMC.
 - Attach receipts/vouchers written for interest and bank fees
- CSMC will reconcile all bank statements and provide reconciliation reports when financial statements are prepared.

IV. FINANCIAL STATEMENTS

CSMC will prepare monthly financial statements:

- Once bank statements are received, CSMC will reconcile bank statements and begin the month-end process.
- Providing CSMC with online bank access will assist us in providing financial statements to the school as quickly as possible. Online access allows us to determine if there is any missing documentation that is needed in order to complete the financials.
- School Treasurer will review Financial statements from Charter Vision
- School Treasurer to notify the individuals/Board Members as indicated by the school when CV access to Financials is available
- The following reports are included on a monthly basis:
 - Balance Sheet Summary
 - P&L by Fund for the current month
 - P&L by Fund for the school year-to-date
 - Year to Date Budget to Actual
 - Bank Reconciliation Report
 - Other reports as requested by the school

When Purchase Order is required:

- School Treasurer Creates & Signs PO Form (Board Policy purchases over \$10,000)
- PO Form to be signed by Superintendent, Principal or Supervisor
- School staff to place order with vendor referencing PO number.
- School staff Confirm that received order is complete and accurate
- School Staff Match packing slip to Purchase Order Form
- School Staff to deposit Purchase Order Form to appropriate School Dropbox folder
- CSMC will retain copy of Requisition Form & scan to Electronic Account (for viewing in Charter Vision CV)

V. GRANT MANAGEMENT

While the School Treasurer takes the lead, CSMC will assist with maintaining grant documentation and reporting provided that the proper documentation is given to CSMC:

- When a grant is awarded, a copy of the grant letter must be sent to CSMC.
- CSMC will determine whether a new fund number needs to be established to track this funding.
- The school is responsible for indicating on each voucher whether the expense is to be paid from a particular grant.

Grant reporting:

- CSMC will provide details of all funds received or expended for each grant as requested by the school.
- CSMC will assist with preparing any grant reports required by funders.
- The current funds remaining for each grant are reported on the Balance Sheet, which is included with the monthly financial statements. If at any time, the fund balance does not agree with what you believe to be correct, please notify CSMC for a detailed listing of expenses.
- If corrections need to be made, please email a list of items to be re-classed to CSMC.

VI. CASH MANAGEMENT

While the School Treasurer takes the lead, CSMC can assist the school with cash management issues, if desired:

- CSMC can assist in preparing and maintaining cash flow projections.
- CSMC to assist in providing accurate bank balance information.

VII. BUDGETING

While the School Treasurer takes the lead, CSMC assists the school with budget:

- CSMC can assist in preparing budgets.
- If Budget-to-Actual reports are requested by the school, the budget must be provided/prepared by CSMC in a format consistent with DOE chart of accounts.

APPROVED FORMS

There are several forms that should be used during the accounting cycle.

❖ Requisition Form

This form is used to request an order be placed for supplies or equipment

❖ Purchase Order

This form is used to post an encumbrance for purchases over .

❖ Expense Report

This form is used to document mileage reimbursement paid to any school employee.

REPORT DUE DATES
(to be edited by School Treasurer)

The following list includes reporting that CSMC will prepare on your behalf. This list does not include all reporting required by the school. Exact due dates may vary from year to year. This list is provided to give you a general idea of reporting deadlines.

July 10	xxxxxxx
July 15	xxxxxxx
July 30	xxxxxxx
August 2	xxxxxxx
August 15	xxxxxxx
October 10	xxxxxxx
October 15	xxxxxxx
October 30	xxxxxxx
November 15	xxxxxxx
December 1	xxxxxxx
January 10	xxxxxxx
January 15	xxxxxxx
January 30	xxxxxxx
January 31	xxxxxxx
February 2	xxxxxxx
February 15	xxxxxxx
April 10	xxxxxxx
April 15	xxxxxxx
May 15	xxxxxxx
May 15	xxxxxxx
June 1	xxxxxxx

In addition, CSMC will prepare monthly financial statements prior to any Board meetings in the event that a Board Member is not versed in Charter Vision.

NEW CLIENT SETUP CHECKLIST

I. FOR ALL SCHOOLS

A. GENERAL SETUP

- Articles Of Incorporation
- Bylaws
- List Of Board Members With Titles And Emails
- Charter Application
- IRS 501C (3) Determination Letter
- IN Tax Exempt Status Letter
- School Year Calendar
- State Charter School Number
- Any State Or Local School Identifying Numbers

B. PAYROLL

- IRS Employer Identification Number, Aka "EIN" Number
- State Employer Identification Number(s), Aka "EIN" Number(s)
- Notice Of State Unemployment Insurance Contribution Rate
- Employee Contracts (if any)
- Employee W-4s
- Garnishments (if any)
- Salary Reduction Agreements (if any)
- Signature For Stamps (used for paycheck 'signing')
- Voided Check From The Account From Which Payroll Will Be Drawn
- Employee Handbook

___ Union Agreement (if applicable)

___ Vacation, Sick And Other Accruals – What Are The Rules?

C. ACCOUNTING

___ Audit Firm And Partner Or Manager Contact Info

___ Financial Policies

___ Latest Available Bank Statements

___ Grant Awards

___ Lease Agreements (if any)

___ Loan Agreements (if any)

___ Memorandum Of Understanding (MOU) With Authorizer

___ Latest Budget And Cash Flow Projections

___ Signed W-9s For Contractors And Amounts Paid

(FOR OPERATING SCHOOLS, PLEASE SEE NEXT PAGE FOR ADDITIONAL ITEMS)

II. FOR OPERATING SCHOOLS

A. PAYROLL

- ___ Payroll Company
- ___ Pay Frequency – Monthly/Semi & For Which Groups Of Employees
- ___ Number Of Employees
- ___ Payroll Accruals As Of Last Payroll Run
- ___ 941 Forms For Current Calendar Year
- ___ DE-9 Forms For Current Year
- ___ Latest Employee Retirement System Reports
- ___ Timesheets
- ___ HR System
- ___ Benefits – How Paid – Through Vendor Or Cut Through Clearing

B. ACCOUNTING

- ___ Current Chart Of Accounts
- ___ Latest Closed Month's Trial Balance
- ___ Detailed List And Amounts Of Balance Sheet Accounts Through Transition Date
- ___ Last Two Bank Reconciliations, Including Outstanding Checks
- ___ Last Audit Report
- ___ Check Register For The Year
- ___ 1099s For The Prior Year
- ___ 1099 Amounts Paid From January 1 To CSMC Start Date
- ___ Income Statement For Prior Year
- ___ Income Statement Through Transition Date
- ___ Balance Sheet For Prior Year

___ Balance Sheet Through Transition Date

___ List And Amounts Of Accounts Payable And Receivable

___ Debt Schedule

___ Fixed Asset Ledger

___ List And Amounts Of Any Prepaid Expenditures

C. GENERAL

___ Any Pertinent User IDs

___ Any 'Title' Program (e.g. Title I) User Names And Passwords

___ FY 11/12 Reports For Funding Such As Facility Grants (Federal And State), Etc.

Appendix B

The Green School's Core Beliefs

We believe in fostering a respect, honor and love for people, the natural world, for animals and plants, for the air that we breathe and the food that we eat. Underlying the cultivation of love, compassion and respect for the earth and all living creatures is the foundational principle of the interconnectedness of all life. A student's overall health and well-being is directly related to the health and well-being of others in the learning community, as well as to that of the larger local community, and planet. Students will engage in experiential and meaningful activities that emphasize personal responsibility and stewardship, and be encouraged to see how their own choices and decisions impact the greater community, both locally and globally. Practices involving conservation and sustainability will be emphasized, and direct connections will be made between the natural world and the conveniences of our modern life. While the challenges present in our world will be brought to the awareness of the students, an attempt will be made to overlay these realities with a larger template of goodness, beauty and truth, giving the students a positive picture of the world, which emphasizes the contributions and gifts that each child brings.

We honor our relationships with one another, and believe that we are here to be of service to ourselves, others and the larger community, and to create empowering conditions for our students, faculty, and parents. A healthy school community is made up of individuals committed to working together, attentive to forming long-term and reciprocal relationships of mutual respect and responsibility, and dedicated to creating a positive learning environment for all. Learning together in the classroom, is primarily a social activity, and we know that strong, extended and meaningful interpersonal relationships between students, teachers and parents can result in increased student motivation, as well as improved learning outcomes. Compassionate, respectful social interactions are not only the means by which successful communication and learning take place, but provide learning experiences in and of themselves, that will serve students far beyond the years of their formal education.

We believe in the importance of a curriculum and pedagogy, inspired by Waldorf education and infused with social justice and environmental education. Such a curriculum aspires to awaken imagination and wonder in children and enliven and expand the breadth of student learning, bringing joy into the classroom. Through our curriculum, we will address the developmental needs of all children, through integrated, art-filled learning and strengthen literacy and numeracy with innovative and practical pedagogical methods. Because we believe in a curriculum infused with social justice, we intend to enhance and enliven the multicultural aspect of history and language arts through stories, myths, folk tales and legends of various cultures. In addition, we will use creativity in the classroom while nurturing emotional intelligences, kindness and responsibility through character building activities. We believe that students of a variety of backgrounds will benefit with this experiential and integrated approach to teaching and learning. Finally, by infusing our curriculum with environmental education, we will teach children about the natural world through place-based education, gardening, and a reverence and respect for the earth woven into all aspects of their day.

We believe in a school based on equity for all, where each individual is worthy of love and respect and has assets to share with the school and larger community. Our school's culture is founded on the premise that each child brings a unique set of gifts, talents, preferences and strengths to the learning environment, while at the same time reflects the whole of humanity in his or her desire to be valued, loved and appreciated. Our approach can best be described as holistic in nature, that is, a multi-disciplinary approach that speaks to all facets of the human being – mind, body and spirit. This method, which seeks to connect to the whole child, endeavors to provide entry points through which each child can enter into the curriculum, not solely by way of the intellect, but also through physical movement, and the creative and practical arts. It is the work of each instructor, as well as the entire school community, to nurture the spirit and growth of each student and build on his or her individual assets and confidence.

We honor the environment and believe in modeling environmental sustainability through the green building where our school will be housed, the landscape around the school and the sustainable social environment that will be created at our school. We intend to awaken a sense of awe and wonder in

children through an experiential, developmentally appropriate experience in nature. Children will be immersed in the natural world and will be shown the joy of purposeful work and how to contribute to the school and greater community through actual hands-on experiences in the garden and on school grounds. By grounding children through real work, they will discover the interconnection between healthy foods, a healthy body and a healthy planet, and will in turn develop a deep honor and respect for the plants and animals that sustain us. Attending school in a “green building” benefits students and faculty physically through the healthy indoor air quality, natural lighting, and natural beauty, and emotionally through the daily honoring of each person’s aesthetic sense and sensibility.

We believe in offering academic rigor in a relaxed, safe context. This includes the freedom and security for students, teachers and parents to explore, satisfy curiosity, ask questions and to question with a sense of safety and responsibility. When secure in the mutual respect, trust, acceptance and caring for everyone in our school and community, we are free to recognize our assets and share these talents for the benefit and success of all. Through the exploration of topics of immediate relevance to our world, students, parents, and teachers alike prepare to successfully address the current and future issues and challenges of our communities. Questioning, exploring, wondering and taking action are encouraged and supported, for and by all, in the pursuit of learning in greater depth and performing at higher levels. Through this process, we learn, grow, and reach our potential together. The education and success of all is the shared responsibility of all.

We believe that by teaching all students how to acquire and construct knowledge, think creatively and critically and apply learning, we enable each student to reach higher levels of academic potential. We believe that igniting and stoking each student’s passion for learning is a critical element of our school’s culture. At our school, teachers, parents and staff are collaborators in each student’s learning and development. By teaching all students how to learn and providing scaffolds to support the personalized learning of each student, we provide the foundation that enables every student to reach his or her unique learning potential. By providing cognitive and emotional support through encouragement and assistance for each child to take risks, we nurture the development of a child’s lifelong love of learning. This collaborative journey, while addressing individual learning styles, talents and skills, will transform students and inspire each to be an agent of good at school, at home and in the community.

Appendix C

Image of Lazured Classroom



Appendix D

Sample Morning Lesson Book Pages



To reduce a fraction, we find the largest factor that the numerator and denominator have in common. For example, reduce the fraction $\frac{8}{12}$: Our candelabra shows us that the number 4 goes evenly into both 8 and 12, so we divide both the numerator and denominator by 4:

$$\frac{8}{12} = \frac{\cancel{8}^2}{\cancel{12}_3} = \boxed{\frac{2}{3}}$$

This is the reduced fraction.

Appendix E

SELF EVALUATION TOOL

The School Director will use the following checklist to guide her self-evaluation process.

PRINCIPLES

Ensuring Organizational Focus

ADMINISTRATOR RESPONSIBILITIES

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

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

Developing People

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

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

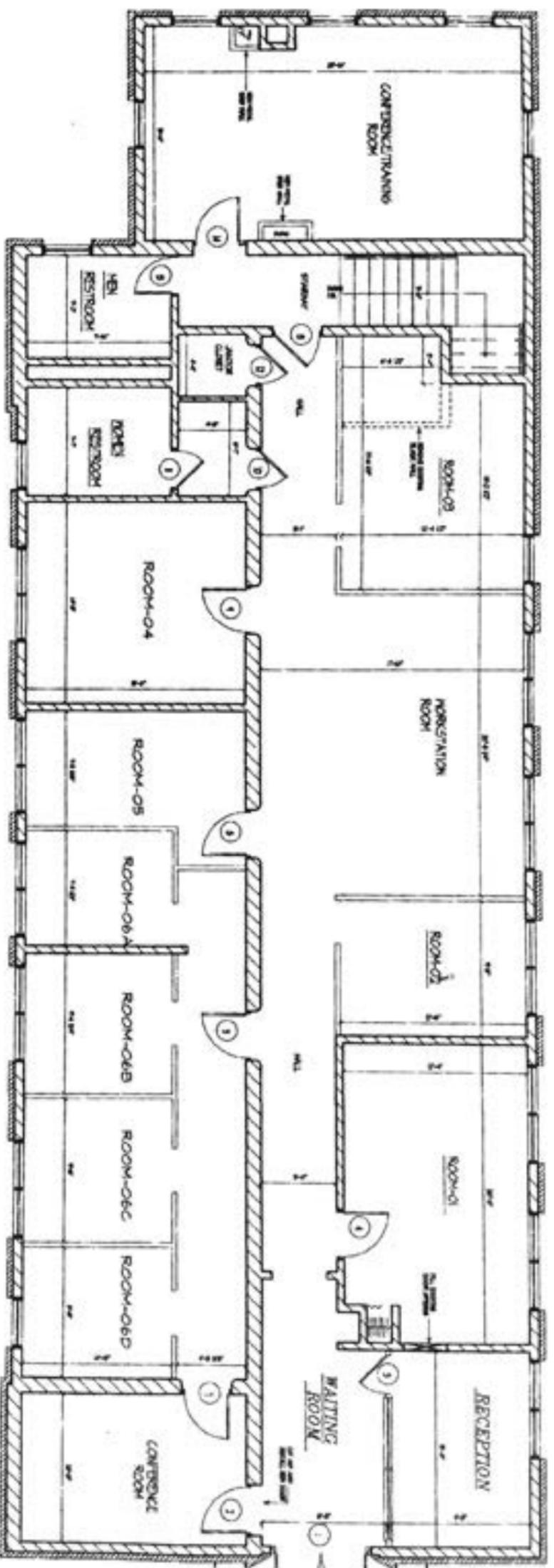
Appendix F

School's Compensation System and Performance Evaluation Process

Measure will be objective, including the following:

- State wide assessments
- Locally developed assessments
- Rigorous measures of effectiveness including observations and other performance indicators
- Each certified employee will be evaluated annually and given a designation in one of the following categories
 - Highly effective
 - Effective
 - Improvement necessary
 - Ineffective
- All teachers will be given an explanation regarding the designation they receive by the evaluator
- Teacher evaluators will have training and support in evaluation skills
- The completed evaluation will be sent to the certified employee within 7 days of completion
- If a certified employee receives a rating of ineffective or improvement necessary the evaluator and the employee will develop a remediation plan of no more than 90 school days in length to correct the deficiencies.
- A teacher who receives an effective rating may file a request for a private conference with the superintendent no later than 5 days after receiving notice.

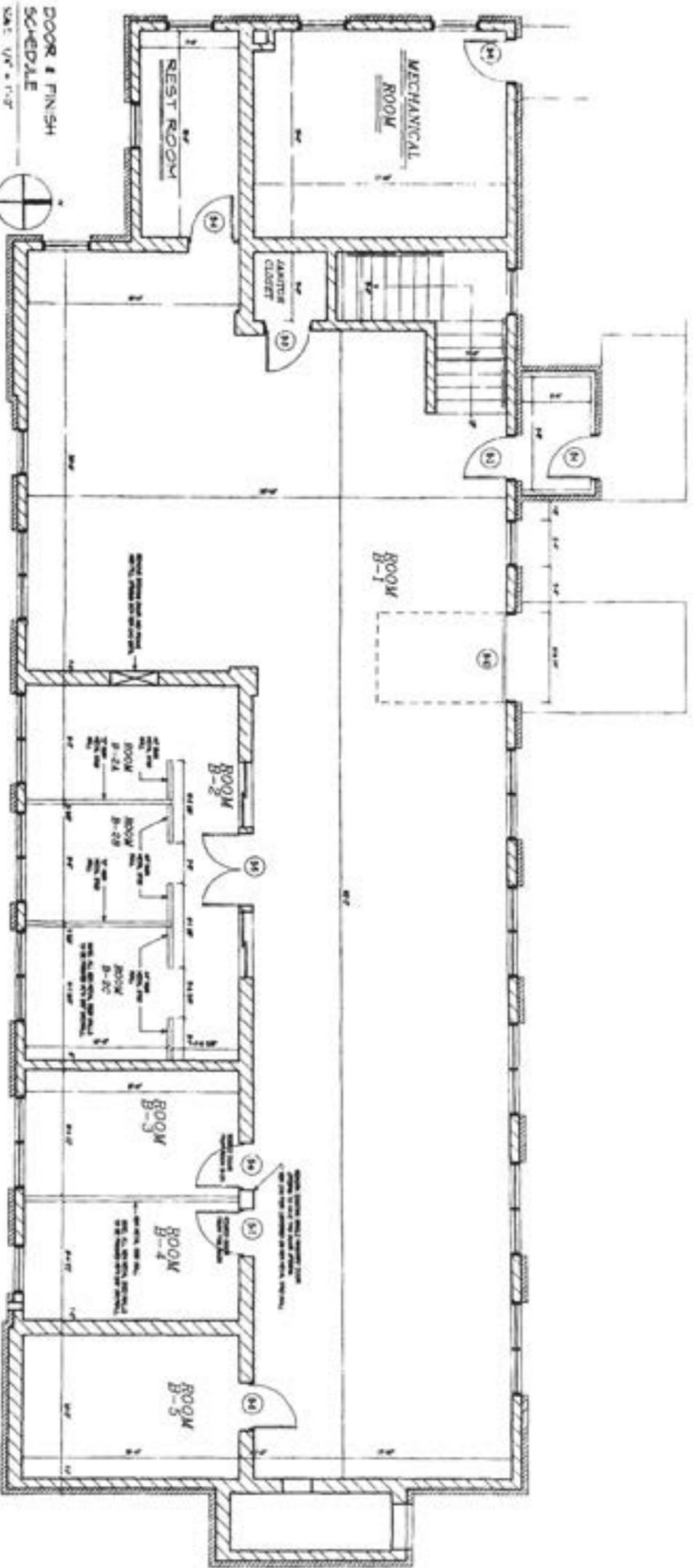
Appendix G
Floor Plan for the Proposed School Building



DOOR & FINISH
 SCHEDULE
 A
 SCALE 1/8" = 1'-0"



DOOR & FINISH
 SCHEDULE
 SCALE: 1/8" = 1'-0"





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THE GREEN SCHOOL BOOMINGTON, INDIANA BUDGET ANALYSIS

NEW CONSTRUCTION

Concrete	\$10.00 / SF
Masonry	\$8.00 / SF
Metals	\$7.00 / SF
Wood & Plastics	\$12.00 / SF
Thermal & Moisture	\$5.00 / SF
Doors & Windows	\$8.00 / SF
Finishes	\$10.00 / SF
Equipment	\$1.00 / SF
Mechanical	\$14.00 / SF
Electrical	\$7.00 / SF
TOTAL	\$82.00 / SF

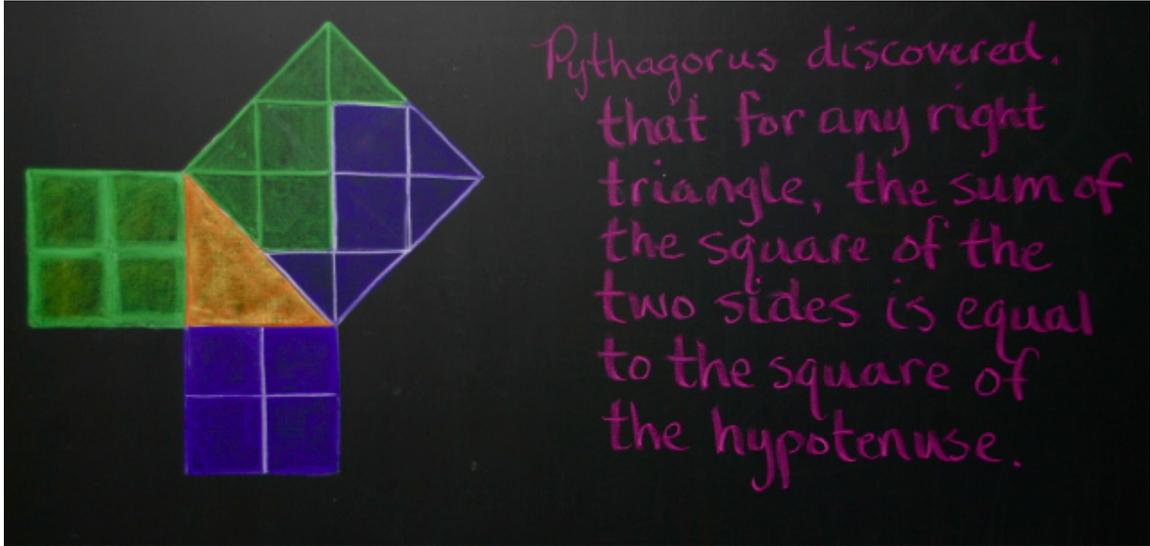
RENOVATION

Concrete	N/A
Masonry	N/A
Metals	N/A
Wood & Plastics	\$1.00 / SF
Doors & Windows	\$1.00 / SF
Finishes	\$1.00 / SF
Equipment	\$1.00 / SF
Mechanical	N/A
Electrical	N/A
TOTAL	\$4.00 / SF

SITE WORK

Infrastructure	\$3.00 / SF
Improvements	\$20.00 / SF
TOTAL	\$23.00 / SF

Appendix I
Blackboard drawing of the Pythagorean theorem



Appendix J



US PARTNERSHIP

DECADE OF EDUCATION FOR SUSTAINABLE DEVELOPMENT
UNITED NATIONS DECADE (2005-2014)

US Partnership for Education for Sustainable Development National Education for Sustainability K-12 Student Learning Standards Version 3 – September 2009



Endorsed by
**National Council for the
Social Studies**

www.ncss.org

Introduction

The National Education for Sustainability K-12 Student Learning Standards define what K-12 students should know and be able to do to be **sustainability literate**. Included are three overarching **student learning standards** or **essential understandings** followed by a **summary chart** (Table 1) of Education for Sustainability (EfS) **concepts** by K-4, 5-8, and 9-12 grade bands. Grade band concepts are organized by **components** which are directly connected to the three learning standards. Following the summary chart are three individual grade band tables (Tables 2, 3, and 4) that include the EfS concepts with **example performance indicators**. A **glossary of terms** is found at the conclusion of the document.

The Education for Sustainability (EfS) standards were developed by the K-12 and Teacher Education Sector of the U.S. Partnership for Education for Sustainable Development (USPESD) with input from K-12 educators in public, private, and pre-service (teacher education) fields. For more information about the USPESD please visit www.uspartnership.org.

Defining Education for Sustainability

Education for Sustainability or Sustainability Education is a relatively new and evolving field. For the purpose of the USP standards, Education for Sustainability is defined as a combination of content, learning methods, and outcomes that helps students develop a knowledge base about the environment, the economy, and society, in addition to helping them learn skills, perspectives, and values that guide and motivate them to seek sustainable livelihoods, participate in a democratic society, and live in a sustainable manner (McMillan and Higgs, 2003).

Purpose and Intent

This is primarily a guidance document for integrating sustainability concepts into K-12 teaching and learning. The EfS standards can be used to help direct a course of study related to sustainability education. Education for Sustainability is by nature interdisciplinary, and therefore can be readily integrated into core content teaching and learning. Education for Sustainability uses a variety of pedagogical techniques that promote participatory learning and higher-order thinking skills.

Education for Sustainability - Student Learning Standards (Essential Understandings)

EfS Standard 1 – Students understand and are able to apply the basic concepts and principles of sustainability (i.e.: meeting present needs without compromising the ability of future generations to meet their needs).

EfS Standard 2 – Students recognize the concept of sustainability as a dynamic condition characterized by the interdependency among ecological, economic, and social systems and how these interconnected systems affect individual and societal well-being. They develop an understanding of the human connection to and interdependence with the natural world.

EfS Standard 3 – Students develop a multidisciplinary approach to learning the knowledge, skills, and attitudes necessary to continuously improve the health and well-being of present and future generations, via both personal and collective decisions and actions. They are able to envision a world that is sustainable, along with the primary changes that would need to be made by individuals, local communities, and countries in order to achieve this.

Table 1: EfS Grade Band Concepts – Summary Chart

Component	K-4	5-8 (Building on topics and areas of study in K-4)	9-12 (Building on topics and areas of study in 5-8)
1.1 Intergenerational Responsibility 2.1 Interconnectedness	<ul style="list-style-type: none"> • Family • Generations (grandparents, parents, children) 	<ul style="list-style-type: none"> • Responsibility to Future Generations 	<ul style="list-style-type: none"> • Intergenerational Equity
2.2 Ecological Systems	<ul style="list-style-type: none"> • Relationships • Historical Connections • Sense of Place 	<ul style="list-style-type: none"> • Systems • Interdependency 	<ul style="list-style-type: none"> • Systems Thinking • Cradle-to-Cradle Design
2.3 Economic Systems	<ul style="list-style-type: none"> • Connection to Nature • Plants, Animals, Habitats 	<ul style="list-style-type: none"> • Natural Resources (renewable & non-renewable) • Biodiversity • Ecosystems • Ecological Footprint (including Carbon Footprint) • Carrying Capacity • Environmental Stewardship • Nature as Model and Teacher 	<ul style="list-style-type: none"> • Respect for Limits • Respect for Nature • Tragedy of the Commons • Environmental Justice • Biomimicry • Urban Design/Land Management • Natural Capital
2.4 Social and Cultural Systems	<ul style="list-style-type: none"> • Human Needs and Wants (food, water, energy, shelter) 	<ul style="list-style-type: none"> • Equity • Resource Scarcity • Energy Economics • Ecological Economics • Food Systems 	<ul style="list-style-type: none"> • Poverty • Ecosystem Services • Alternative Indicators and Indexes of Progress • Globalization • True (or Full) Cost Accounting • Triple Bottom Line • Micro Credit
3.1 Personal Action	<ul style="list-style-type: none"> • Family and Friends • Personal Identity • Happiness • Fairness • Collaborative Learning 	<ul style="list-style-type: none"> • Cultural Diversity • Multiple Perspectives • Citizenship • Resource Distribution • Population Growth • Quality of Life Indicators • Education 	<ul style="list-style-type: none"> • Human Rights • Social Justice • Peace and Conflict • Multilateral Organizations • International Summits, Conferences, Conventions, and Treaties • Global Health • Appropriate Technology • Governance
3.2 Collective Action	<ul style="list-style-type: none"> • Setting Goals • Communicating Ideas • Making a Difference 	<ul style="list-style-type: none"> • Setting Goals • Working Together 	<ul style="list-style-type: none"> • Personal Responsibility • Personal Footprint Calculation • Critical Thinking • Problem Solving • Project Planning and Action
3.2 Collective Action	<ul style="list-style-type: none"> • Designing a Sustainable System • Structural vs. Personal Solutions • Democracy • Societal Footprint Calculation • Local, State, and National Sustainability Plans 	<ul style="list-style-type: none"> • Local to Global Responsibility • Community-Based and Societal Level Decision-Making • Public Discourse and Policy • Organizational and Societal Change Skills and Strategies 	

Table 2: K-4 Grade EfS Concepts – With Example Performance Indicators

Component	Concepts and Example Performance Indicator
<p>1.1 Intergenerational Responsibility</p>	<ul style="list-style-type: none"> • Family - Students analyze their roles and responsibilities in their family. • Generations (grandparents, parents, and children) - Students draw and label their family tree indentifying different generations. Students understand how their actions today may affect other generations; they take action to minimize negative impacts on future generations (service-learning projects)
<p>2.1 Interconnectedness</p>	<ul style="list-style-type: none"> • Relationships - Students interact respectfully with others, including those with whom they have differences. • Historical Connections - Students demonstrate understanding of the concepts of “past”, “present”, and “future.” • Sense of Place – Students demonstrate an understanding of place – the natural systems and cycles, the human/cultural context, and the connections between both. At this grade level they focus on developing their sense of place in their immediate community. Example: Students create a story or drawing that demonstrates their understanding and connection to a special place of significant meaning to themselves, their family, and their community.
<p>2.2 Ecological Systems</p>	<ul style="list-style-type: none"> • Connection to Nature – Students, in both urban/sub-urban and rural environments spend time outdoors experiencing and interacting with nature by walking, observing, gardening, etc. They feel comfortable being in the outdoors (e.g.: getting dirty, seeing insects and animals), they see the patterns and connections in nature, and they begin to develop a naturalist intelligence. • Plants, Animals, Habitats - Students are able to distinguish between plants and animals and can explain how living organisms interact with the environment in which they live. Students identify food /energy, water, shelter as basic needs of animals and plants. Examples: Students sort local common organisms into animal and plant groups. They design and build a schoolyard habitat for native species, taking into consideration the basic needs of the plants or animals.
<p>2.3 Economic Systems</p>	<ul style="list-style-type: none"> • Human Needs and Wants (food, water, energy, shelter) - Students distinguish between personal wants and needs and identify how culture, marketing, and advertising inform their consumption patterns. Students identify food, water, energy and shelter as basic human needs.
<p>2.4 Social and Cultural Systems</p>	<ul style="list-style-type: none"> • Family and Friends - Students define and develop productive and satisfying relationships with others. They value and know how to help create an atmosphere of mutual respect and kindness. • Personal Identity - Students develop a sense of unique worth and personal competence. • Happiness - Students have a sense of well-being and understand which factors contribute to their own and other’s happiness. • Fairness – Students treat others fairly. They develop an understanding that resources need to be shared to meet the needs of living things – across places and generations. • Collaborative Learning - Students perform effectively on teams that set and achieve goals, conduct investigations, solve problems, and create solutions (e.g., by using consensus-building and cooperation to work toward group decisions).

3.1 Personal Action	<ul style="list-style-type: none"> • Setting Goals - Students assess their own learning by developing criteria for themselves, and use these to set goals and produce high-quality work. • Communicating Ideas - Students use different media to share ideas with diverse audiences. • Making a Difference - Students take an active role in their community and feel a locus of control or self-efficacy. Students understand that everyone has the ability to affect change or impact a system, community, and self.
3.2 Collective Action	<ul style="list-style-type: none"> • Setting Goals - Students work cooperatively and respectfully with people of various groups to set community goals and solve common problems. • Working Together - Students perform effectively on teams that set and achieve goals, conduct investigations, solve problems, and create solutions (e.g., by using consensus-building, conflict resolution, and cooperation to work toward group decisions). Students use systematic and collaborative problem-solving processes, including mediation, to negotiate and resolve conflicts. Students respect and value human diversity as part of a multi-cultural society and world.

Table 3: Grade 5-8 EfS Concepts – With Example Performance Indicators

Component	Concept and Example Performance Indicator
1.1 Intergenerational Responsibility	<ul style="list-style-type: none"> • Responsibility to Future Generations - Students analyze and list their roles and responsibilities in their family, their school, and their community -- now and into the future. They demonstrate understanding of the cultural context of intergenerational responsibility (i.e. how some cultures consider and plan for seven generations into the future, etc)
2.1 Interconnectedness	<ul style="list-style-type: none"> • Systems - Students describe the ecological, economic, political, and social systems in their community and can identify leverage points in the system to improve their community • Interdependency - Students explain how natural and built communities are part of larger systems (e.g., farms as part of the regional watershed and food systems for cities, a mine as part of the regional economy) and the interrelationships that exist among those systems.
2.2 Ecological Systems	<ul style="list-style-type: none"> • Natural Resources (renewable & non-renewable) – Students investigate the natural systems in their local region and explore how humans have impacted those systems, both positively and negatively. Examples: They identify natural and agricultural resources and where they come from (e.g.: wildlife, fish, plant, rock, water, soil, minerals, sunlight, and air). Students distinguish between natural resources and things made by humans (e.g., sand vs. cement, milk vs. ice cream, wheat vs. bread, sap vs. syrup, wildlife versus domesticated animals). Students describe a resource that will regenerate in their lifetime and identify resources that are finite. • Biodiversity - Students explain how the range of species and their habitats within an ecosystem interact and identify the physical environment and processes necessary for that interaction. Example: Students identify plant and animal species of their local region and describe how each species is dependent upon another species in the region through a graphic depiction linking each to at least one other by drawing connecting lines. • Carrying Capacity - Students provide an example of the maximum population that an environment can support indefinitely. • Ecological Footprint (including Carbon Footprint) - Using standard footprint calculation models, students determine the impact of their lifestyle decisions such as transportation, food, and housing choices. • Environmental Stewardship - Students design a restoration plan for a local environment that describes the natural resources, through field-based data collection, and includes the social, economic, and political mechanisms to preserve and enhance the described environment. • Nature as Model and Teacher - Students investigate designs and systems in nature that can serve as models for human-created sustainable products, services, and systems.

<p>2.3 Economic Systems</p>	<ul style="list-style-type: none"> • Equity - Students compare the distribution of resources between two or more economic classes, and ethnic and cultural groups with in their own community and afar • Resource Scarcity - Students analyze the use of a local natural resource (e.g. animal, mineral, vegetable, lumber, fish, and minerals) and consider the resources' ability or inability to regenerate at a sustainable level. • Energy Economics - Students survey their own household energy uses, explore opportunities for increased energy efficiency and conservation, and then calculate potential savings over time. • Ecological Economics - Students explain how a specific ecological region provides environmental, social and economic value. For example, a healthy rain forest as a storehouse of historical, current, and potential medicines of tremendous social and economic value. When this ecological diversity is gone, so is the economic and social value of its medicinal plants. • Food Systems - Students analyze local, national and global food systems, demonstrating an understanding of the differences between industrial farming, factory farming, family farming, organic, and non-organic farming. They study the history of, and debates over, the U.S. Farm Bill, and related concepts including protectionism, free trade, and fair trade in the context of food.
<p>2.4 Social and Cultural Systems</p>	<ul style="list-style-type: none"> • Cultural Diversity - Students explore their own cultural identity and the identity of their peers and people in their community and the different views and values that each culture brings to the community. • Multiple Perspectives - Students consider an issue or challenge related to sustainability, through a variety of lenses or perspectives and they explain how approaching that issue or challenge from different perspectives may result in different decisions and outcomes. • Citizenship - Students explore a range of opportunities for civic engagement, including informed voting, grassroots activism, volunteerism, lobbying, involvement in non-governmental organizations, and working in government. • Resource Distribution - Students compare the distribution of a common resource (e.g. money, food) of different groups of people in their own community, region, nation, or world and explain how this resource distribution affects sustainability. • Population Growth - Students graph the human population growth of a community over time and investigate how the growth or decline of a population affects a community's social, economic, and environmental sustainability, including factors that may contribute to unsustainable population growth (e.g. lack of access to reproductive health care, lack of education, poverty, and resource scarcity). • Quality of Life Indicators - Students define indicators that contribute to their own and their community's quality of life and assess their and their community's quality of life based on these indicators. • Education - Students explain how education can impact the sustainable practices of an individual and community.
<p>3.1 Personal Action</p>	<ul style="list-style-type: none"> • Personal Responsibility - Students know the difference between actions that they can take themselves and those that require the involvement of other people, organizations, and government. They identify and carry out a personal action that will enhance quality of life in environmental, social/cultural, or economic sectors. • Personal Footprint Calculation - Students use an on-line calculator to determine their ecological footprint. • Critical Thinking - Students analyze a significant news item (environmental, social/cultural, or economic) and use the "Iceberg Model" to determine the difference between the event (the "tip of the iceberg" – the facts of the situation), patterns (the middle of the iceberg – is it a singular or repeated event?), root causes (the larger base of the iceberg –

	<p>what are the underlying causes of the event or pattern of events?), and solutions (What can be done to positively change the structure of root causes?).</p> <ul style="list-style-type: none"> • Problem Solving - Students identify an issue in their community and analyze it from the perspective of environmental, social/cultural, and economic concerns, brainstorm root causes, identify stakeholders, and design a solution. • Project Planning - Students create a flow chart, timeline, or some other type of graphic organizer to identify these components of a poster and action project: issue/topic, resources, research, poster mock-up, final poster assembly, poster presentation, and action or service towards a solution.
<p>3.2 Collective Action</p>	<ul style="list-style-type: none"> • Designing a Sustainable System - Using a Venn diagram, students log environmental, social, and economic impacts of a service or system that they use (e.g. transportation of food product). Then students brainstorm a more effective “cradle to cradle” life cycle for the system or product that is effective in terms of reusing or recycling technical nutrients and returning biological nutrients to nature. • Structural vs. Personal Solutions - Students identify a problem that they cannot solve through personal action alone (e.g. designation of an unused green space for protection and public use or a vacant lot for a skateboard park), research related issues (e.g. zoning, safety, improvements and maintenance expenses), then conduct a letter writing campaign and make a presentation to public officials (e.g. planning commission or city council). • Democracy - Students participate in a simulation to devise a national energy policy through negotiation, collaboration, and coalition building among three groups that make a democratic society: the state, civic organizations, and business. They explain how the practices of a democratic society can contribute to local and global sustainability. They participate as active citizens in the democratic process in the interest of sustainability, using a systems approach to make their actions more effective. • Societal Footprint Calculation - Students use an on-line tool (e.g. www.worldmapper.org) to examine graphic depictions of the relative footprints of different nations, first for overall ecological footprint, and then in specific areas (e.g. carbon emission, caloric consumption, wealth, house size, etc.). • Local, State, and National Sustainability Plans - Students participate in a simulation of the process that is used to develop local, state, or national sustainability plans. They develop a sustainability plan for their school to adopt more sustainable practices and then discuss how that compares to the development of governmental or community-based plans.

Table 4: Grade 9-12 EfS Concepts – With Example Performance Indicators

Component	Concept and Example Performance Indicator
<p>1.1 Intergenerational Responsibility</p>	<ul style="list-style-type: none"> • Intergenerational Equity - Students forward an ethical argument on how sustainable resource use today can lead to basic human needs (e.g.: food, water, energy and shelter) being met for future generations (e.g.: 100 years in the future).
<p>2.1 Interconnectedness</p>	<ul style="list-style-type: none"> • Systems Thinking - Students identify an unsustainable system (e.g.: apartheid, colonization, fossil fuel energy) and redesign it using systems thinking principles (e.g. long-term, interconnectedness, leverage points). • Cradle-to-Cradle Design - Students explain the continuous cycling of biological and technical nutrients for a cradle-to-cradle designed product or system.
<p>2.2 Ecological Systems</p>	<ul style="list-style-type: none"> • Respect for Limits - Students collect data in order to investigate and analyze how personal consumption patterns affect the sustainability of natural and human communities. • Respect for Nature - Students participate in outdoor education activities to explore and experience the natural environment and enrich their connection with and appreciation for nature. They read nature-related poetry/writings and discuss and compare the authors’ styles and impact on themselves and society.. • Biomimicry - Students design a product or service to address a problem or issue using one or more characteristics from a plant or animal. • Tragedy of the Commons - Students identify local and global “commons”, choose one “commons” and debate with their peers the question, “How can this commons be managed in a way that ensures future generations have the opportunity to use and enjoy it, indefinitely?” • Environmental Justice – Students identify an environmental justice issue in their community (e.g. location of toxic waste facility in poor neighborhood) and write an article (or blog) for the school or local paper that includes possible solutions to remedy the injustice.. • Urban Design/Land Management - Students develop a sustainable land-use plan for an un- or under- developed property or place in their community that provides for a healthy environment, economy, and society. • Natural Capital – Students identify the natural capital of a local or global resource and create a graph depicting their relative worth.
<p>2.3 Economic Systems</p>	<ul style="list-style-type: none"> • Poverty - Students explain the history, causes and potential solutions to poverty in the U.S. and around the world through using the context of the United Nations Millennium Development Goals. • Ecosystem Services - Students choose an ecosystem and list the existing and potential services (products and processes) that it provides to humans. • Alternative Indicators and Indexes of Progress - Students investigate, use, and compare alternative indicators of social and economic progress (e.g. Genuine Progress Indicator) with traditional economic indicators (e.g. Gross Domestic Product) to determine the health and well-being of their local community. • Globalization - Students describe the pros and cons of globalization and how a globalized world contributes to and detracts from sustainability. • True (or full) Cost Accounting - Students choose a product or service and list its hidden social and environmental

	<p>costs.</p> <ul style="list-style-type: none"> • Triple Bottom Line - Students conduct an analysis of a business operation in terms of environmental, economic, and social/cultural factors. • Micro Credit - Students investigate a micro-credit organization's operations in a community and analyze how that operation contributes to the community's long-term sustainability.
<p>2.4 Social and Cultural Systems</p>	<ul style="list-style-type: none"> • Human Rights - Students examine the 1948 United Nations Universal Declaration of Human Rights, comparing this document to the United States Bill of Rights, answering the question, "Which rights from the U.N. Declaration are included in the U.S. Bill of Rights, and which are not explicitly addressed?" • Social Justice - Students research a non-profit group or non-governmental organization whose mission it is to forward social justice, economic opportunity, or civil rights for a particular group of oppressed, excluded, or under-represented people, identifying the organization's mission, key programs, and accomplishments. • Peace and Conflict – Students participate in a conflict resolution activity focused on a personal or school-related conflict. They then apply that knowledge and experience to a global conflict. • Multilateral Organizations - Students research and compare the goals and programs of three multilateral organizations, one economic (OPEC: Organization of the Petroleum Exporting Countries), one environmental (Greenpeace: a global, public interest group dedicated to a world where people live peacefully in ways that allow the natural environment to sustain itself), and one social (UNESCO, the United Nations Educational, Scientific and Cultural Organization that promotes education, social and natural science, culture, and communication as a laboratory of ideas and a standard-setter to forge universal agreements on emerging ethical issues). • International Summits, Conferences, Conventions, and Treaties - Students research and compare the goals, programs, and/or outcome documents or action plans that resulted from three United Nations international summit processes, global conferences, or conventions and treaties – along with the proposals from the accompanying civil society forums. • Global Health - Students examine strategies to curb malaria, comparing the economic and health efficacy of low cost preventative measures such as mosquito nets with more costly pharmaceutical research and treatment efforts. • Appropriate Technology - Students study a developing country to answer the question, what will achieve greater health, longevity, and sustainable development: basic technologies such as potable water systems and cell phones, or high technology such as personal computers and on-line services? • Governance - Students demonstrate their understanding of how authority is exercised in different countries under different forms of government. They understand that good governance in the U.S. includes a transparent and interactive system of government sector, business/private sector; and public/community sector. They actively participate in some aspect of local governance (e.g. attending and testifying at a city council meeting or registering voters).
<p>3.1 Personal Action</p>	<ul style="list-style-type: none"> • Personal Responsibility - Students identify and commit to a personal sustainability action and they write about the results of that action. (e.g.: using public transportation, reducing and recycling). • Accountability - After completing a thorough ecological footprint or product trail assessment of a product or service that they use, students identify alternate products or strategies for more responsible use. They develop a means for measuring the net progress of the product or strategy alternative.

	<ul style="list-style-type: none"> • Lifelong Learning and Action - Students write their own “story of learning” in which they describe how best they learn and move to action, where they learn and act both in and outside of school, and their strengths as a learner and doer. • Personal Change Skills and Strategies - Students identify what systems and strategies work best at self-motivating planning and action for effective personal change.
<p>3.2 Collective Action</p>	<ul style="list-style-type: none"> • Local to Global Responsibility - Student describe the difference between a local and global problem, how the problems might be connected and how a potential solution to each could require different actions (at different levels – ranging from the local to the global). Students then take at least one action and analyze the results and lessons learned for future actions. • Community-Based and Societal Decision-Making - Students actively participate in local community-based and national and/or international decision-making focused on sustainable development. • Public Discourse and Policy - Students communicate their ideas in a public discussion or debate about a topic that furthers local and/or global sustainability, take action on that topic, and reflect upon the results. • Organizational and Societal Change Skills and Strategies - Students identify skills and strategies required to create effective group change for a given issue, take action on that issue and then reflect on lessons learned regarding change strategies.

Glossary of Terms

A

accountability - The acknowledgment and assumption of responsibility by an individual or an entity for actions, products, decisions, and policies.

alternative indicators and indexes of progress - Alternative indicators empirically study and track social issues such as sustainable development and environmental degradation; and address the problems encountered in the use of Gross Domestic Product as a normative indicator (also see “quality of life indicators”).

appropriate technology - Technology that is designed with special consideration to the environmental, ethical, cultural, social, and economical aspects of the community it is intended for.

B

biodiversity - The range and interaction of species and their habitats within an ecosystem and the physical environment and processes necessary for that interaction.

biomimicry - Designing products, services, and industrial systems to mimic biological design and cycles found in nature (also see “nature as model and teacher”).

C

carrying capacity - The maximum population that an environment can support, indefinitely.

community-based decision-making - A decision-making process in which community members gather information and take the lead in setting policies for the development of their own community.

cradle-to-cradle design - A product design method in which all material components are put back into service perpetually, therefore resulting in no waste product(s). Input and outputs are seen either as technical or biological nutrients. Technical nutrients can be recycled or reused with no loss of quality and biological nutrients are composted or consumed.

critical thinking - An essential tool of inquiry that involves interpretation, analysis, evaluation, inference and synthesis, as well as explanation of the evidential, conceptual, methodological, or contextual considerations upon which that judgment is based.

cultural diversity - The cultural differences that exist between people, such as language, dress, and traditions, and the way societies organize themselves, their conception of morality and religion, and the way they interact with the environment.

D

Democracy - A form of government in which the supreme power is vested in the people.

E

ecological economics – An interdisciplinary field of academic research that addresses the metric of interdependence between human economies and natural ecosystems (also see “true cost accounting”).

economic globalization - The integration of national economies into the international economy through trade, foreign direct investment, capital flows, migration, and the spread of technology (also see “globalization”).

ecological footprint (including carbon footprint) - The total area of productive land and water required, on a continuous basis, to produce the resources consumed, and to assimilate the wastes produced, by that population, wherever on Earth the land (and water) is located. Carbon footprint is the amount of carbon emissions generated by individuals, businesses, or nations.

ecosystem services – The benefits humans derive from resources and processes that are supplied by natural ecosystems. These benefits include products (e.g.: clean drinking water) and processes (e.g.: decomposition of wastes) (also see “natural capital”).

ecosystem - A community of living organisms and the environment in which they live, interacting to form a whole functional system.

energy economics - A broad scientific subject area which includes topics related to supply and use of energy in societies.

environmental justice - The equitable treatment of all people, in relation to environmental health regardless of race, income, or class (also see “equity”).

environmental stewardship - Caring for and making decisions in the best interest of the environment that supports all life.

equity - The state, quality, or ideal of equality and justice between economic classes, ethnic and cultural groups, and the fair distribution of resources (also see “environmental justice”).

G

global health - Health issues and concerns that transcend national boundaries, may be influenced by circumstances or experiences in other countries, and are best addressed by cooperative actions and solutions.

globalization - The transformation of local or regional phenomena into global ones. It is a process by which a combination of economic, technological, socio-cultural, and political forces unify people of the world into a single society that functions together (also see “economic globalization”).

governance - The exercise of authority in a country. The capacity to formulate, implement and enforce public policies. Good governance involves the collaboration and negotiation of government, the private sector, and the public.

H

habitat - The place or environment where a plant or animal naturally or normally lives and grows.

human rights - The basic entitlement accorded to every human being. The rights include the right to health, education, shelter, employment, property, food, and freedom of expression and movement.

I

intergenerational responsibility - The extent to which one takes responsibility for the effect(s) of her/his actions on future generations.

intergenerational equity - Consideration of the fairness and justice associated with an individual’s or a government’s action on subsequent generations (also see “equity” and “environmental justice”).

international summits, conferences, conventions, and treaties - Examples of summits, conferences, conventions, and treaties include: Millennium Declaration from the 2000 Millennium Summit and the Peoples Agenda from the Millennium NGO Forum; the 2005 Heads of State Summit Conference and June Civil Society Forum; the International Criminal Court; the World Summit on Sustainable Development Plan of Implementation from Johannesburg in 2002; the Rio de Janeiro Earth Summit Conference and Conventions on Climate, Bio-Diversity, and Combating Desertification from 1992; the Earth Charter; the Cairo Population Conference of 2005; the UN Habitat Conference of 2006; the Beijing Conference on the Rights of Women; and the Convention on the Rights of the Child.

L

lifelong learning - A broad concept where education that is flexible, diverse and available at different times and places is pursued throughout life.

M

micro credit - The business or policy of making small loans to poor people for entrepreneurial (business) projects.

multilateral organizations - Organizations formed between three or more nations to work on issues that relate to all of the countries in the organization.

N

natural capital - The resources of a natural ecosystem that yields a flow of valuable ecosystem goods and services in the future. It is the extension of economic capital to environmental goods and services (also see “ecosystems services”).

natural resources (renewable & non-renewable) - Naturally occurring substances that are considered valuable in their relatively unmodified (natural) form. A renewable resource is a natural resource that can be replenished by natural processes at a rate comparable or faster than its rate of consumption by humans or other users. A non-renewable resource is a natural resource that cannot be re-made, re-grown, or regenerated on a scale comparative to its consumption.

nature as model and teacher - The concept in which the Earth’s living systems offer designs and models from which humans can learn in regard to designing products, processes, and systems (also see “biomimicry”).

P

personal footprint calculation - A method of calculating the ecological footprint (area of the Earth’s productive surface necessary to support a particular lifestyle) of an individual (also see “ecological footprint”).

population growth - The change in population over time, primarily referring to humans.

public discourse and policy - Written or spoken communication or debate in a community setting and the policies that are developed by a community or government.

Q

quality of life indicators - Statistics of well-being that go beyond traditional economic indicators to include social and environmental factors (also see “alternative indicators and indexes of progress”).

R

resource distribution - The way in which resources are distributed to or accessed by people to meet their needs and wants.

resource scarcity - A state in which there is an insufficient amount of resources to meet human needs and wants.

respect for limits - Living within nature’s means by preventing waste, pollution, and, unsustainable resource depletion.

rubric - A scoring tool that lists the criteria for a piece of work (for example, purpose, organization, details, voice, and mechanics could be considered the criteria for a piece of writing); it also articulates gradations of quality for each criterion, from excellent to poor.

S

sense of place - Connecting to and valuing the places in which one lives or visits. Those things that add up to a feeling that a geographic location or community is a special place, distinct from anywhere else.

social justice - The concept in which justice is achieved in every aspect of society, rather than merely the administration of law. Affording individuals and groups fair treatment and an impartial share of the benefits of society (also see “equity” and “environmental justice”).

societal footprint calculation - A method of calculating the ecological footprint of a group of people (e.g. city, region, or country) (also see “ecological footprint”).

structural vs. personal solution - A way of addressing problems through systemic, long-term change. Structural solutions are usually those that address the underlying cause of a problem or issue and are typically addressed by a large body either government, organization, or community as opposed to a solution enacted by an individual.

sustainability and sustainable development - Meeting present needs without compromising the ability of future generations to meet their needs. Sustainability is a holistic approach to living and problem solving that addresses ecological health, social equity, and economic prosperity for present and future generations.

system - A group of interacting, interrelated, and interdependent components that form a complex and unified whole. A system is a collection of “things” in which the whole is greater than the sum of its parts. Some systems are “nested” within larger systems (e.g. the circulatory system is nested within the human body system).

systems thinking - An approach to problem solving that involves the considerations of systems; interconnectedness; the whole versus its parts; respect for limits; unexpected consequences; and, identifying patterns, root causes, and leverage points for change.

T

tragedy of the commons - A conflict over finite resources between individual interests and the common good. The term derives originally from a comparison noticed by William Forster Lloyd with medieval village land holding in his 1833 book on population. It was then popularized and extended by Garrett Hardin in his 1968 Science essay "The Tragedy of the Commons."

triple bottom line - Meeting current and future needs in consideration of environmental, economic, and social/cultural factors.

true (or full) cost accounting - The real costs of products and services that take into account environmental and social impacts (also see “natural capital”).

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