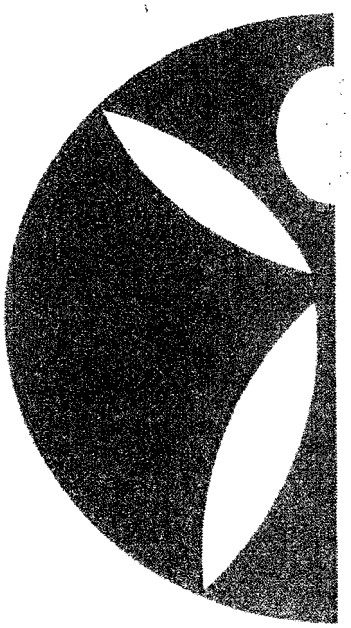

Education

# EDUCATION FOR CHANGE AT COX ELEMENTARY

## CHARTER RENEWAL PETITION

File ID Number: 09-3480
Introduction Date: 12/16/09
Enactment Number: _____
Enactment Date: _____
By:

**DECEMBER 16, 2009**

EDUCATION FOR CHANGE
SUITE 301
303 HEGENBERGER ROAD
OAKLAND, CALIFORNIA 94621

Education *for* Change

November 16, 2009

Office of Charter Schools
Oakland Unified School District
1025 Second Avenue
Oakland, CA 94606

To Whom it May Concern:

It is with pleasure and great dedication to Education for Change students – both present and future – that Education for Change Public Schools submits the following petition for a 5-year renewal of its charter, from July 1, 2010 to June 30, 2015.

The governing Board has from the beginning been committed to overseeing fiscal and academic accountability at Education for Change Public Schools, and we pledge to carry that commitment forward throughout the next five years. We submit that Education for Change at Cox Elementary School has fulfilled the terms of its original charter and is poised to provide an even stronger academic and extra-curricular program for its students in the years ahead.

The governing Board of Education for Change Public Schools authorizes the submittal of this petition for charter renewal, and we thank the Oakland Unified School District for its consideration.

Sincerely,

Desten Broach
President, Board of Directors
Education for Change Public Schools

## Petition for the Renewal of a Charter School

Education for Change at Cox Elementary – Charter Petition Renewal

*The charter school estimates that 26 teachers will be employed by the charter school during its first year of operation after charter renewal.*

*We, the undersigned teachers, support the charter renewal and believe the attached charter merits consideration. We hereby petition the Oakland Unified Board of Education and Superintendent to grant the charter renewal to Education for Change at Cox Elementary charter pursuant to Education Code Section 47605 beginning July 1, 2010, with the opportunity to request a continuation of the charter as described in the Charter Schools Act.* ***The petitioners listed below certify that they are teachers who are meaningfully interested in continuing to teach at the School.*** *The petitioners authorize the Lead Petitioner, Kevin Wooldridge, to make or negotiate any amendments to the attached charter necessary to secure approval by the OUSD governing board.*

| Name | Address |
|---|---|
| Print Name Gabriel Sanchez | Street Address 3226 Roosevelt Ave. |
| Signature | City, State, Zip Code Richmond, CA 94804 |
| | Phone Number |
| Print Name Dana Natac-Paiso | Street Address 337 Central Ave. |
| Signature Dana Natac Paiso | City, State, Zip Code Alameda, CA 94501 |
| | Phone Number (510) 995-8381 |
| Print Name Diane Carter | Street Address 8125 Coach Drive |
| Signature Diane Carter | City, State, Zip Code Oakland, CA 94605 |
| | Phone Number (510) 815-2362 |

| Name | Address |
|---|---|
| Print Name<br>Lisa Stuart | Street Address<br>2550 Oak Rd. # |
| Signature<br>Lisa Stuart | City, State, Zip Code<br>Walnut Creek, CA 94597 |
| | Phone Number<br>925- 944-5645 |
| Print Name<br>Danielle Ickay | Street Address<br>3610 Powell Dr. |
| Signature<br>Danielle Ickay | City, State, Zip Code<br>Lafayette CA 94549 |
| | Phone Number<br>925 297 7116 |
| Print Name<br>Amanda Claire | Street Address<br>1419 E. 38TH St. |
| Signature<br>Amanda Claire | City, State, Zip Code<br>Oakland, CA 94602 |
| | Phone Number<br>(510) 289-2421 |
| Print Name<br>Keisa S. Cabezas | Street Address<br>15891 Via Pinale |
| Signature<br>Keisa S. Cabezas | City, State, Zip Code<br>San Lorenzo, CA 94580 |
| L | Phone Number |
| Print Name<br>Lucas Bartsh | Street Address |
| Signature<br>Lucas Bartsh | City, State, Zip Code<br>Oakland, CA 94609 |
| | Phone Number |
| Print Name<br>Anita Smith | Street Address<br>2735 9th Ave |
| Signature<br>Anita Smith | City, State, Zip Code<br>Oakland CA 94606 |
| | Phone Number<br>(510) 257-2667 |

| Name | Address |
|---|---|
| Print Name<br>TINA FLETCHER | Street Address<br>3564 KIMBALL WAY |
| Signature<br>Tina Fletcher | City, State, Zip Code<br>CONCORD, CA 94518 |
| | Phone Number<br>(925) 609-9106 |
| Print Name<br>Nicole Ramirez | Street Address<br>22294 City Center Dr. #5206 |
| Signature<br>Nicole Ramirez | City, State, Zip Code<br>Hayward, CA 94541 |
| | Phone Number<br>510-538-0869 |
| Print Name<br>Colleen Callaghan | Street Address<br>1065 Ashmount |
| Signature<br>Colleen Callaghan | City, State, Zip Code<br>Oakland CA 94610 |
| | Phone Number |
| Print Name<br>KAVITHA SENTHIL | Street Address<br>4171 MARTINEZ CT |
| Signature<br>Skanth | City, State, Zip Code<br>DUBLIN CA 94568 |
| | Phone Number<br>925-336-0240 |
| Print Name<br>Caroline Massey | Street Address<br>3520 Brook St. #12 |
| Signature<br>C Massey | City, State, Zip Code<br>Lafayette, CA 94549 |
| | Phone Number |
| Print Name<br>John Mannion | Street Address<br>2899 Chelsea Dr |
| Signature<br>John Mannion | City, State, Zip Code<br>Oakland, CA 94611 |
| | Phone Number<br>505 715 9626 |

| Name | Address |
|---|---|
| Print Name<br>Karen Fidani | Street Address<br>44 Fircrest Ct |
| Signature<br>Karen Fidani | City, State, Zip Code<br>San Ramon Ca 94583 |
| | Phone Number<br>925 556 3421 |
| Print Name<br>Dana Crossland | Street Address<br>19701 Spruce St. |
| Signature | City, State, Zip Code<br>Castro Valley CA 94546 |
| | Phone Number<br>925-864-0583 |
| Print Name<br>Linda Young | Street Address<br>376 E. 3rd St. |
| Signature<br>Linda Young | City, State, Zip Code<br>Pittsburg Ca 94565 |
| | Phone Number<br>510 806 4161 |
| Print Name<br>Phyong Anh Luu | Street Address<br>2016 E. 29th ST. |
| Signature | City, State, Zip Code<br>Oakland, CA 94606 |
| | Phone Number<br>(510) 847-6682 |
| Print Name<br>Rebecca Schramm | Street Address<br>3130 Webster St. #21 |
| Signature | City, State, Zip Code<br>San Francisco, CA 94123 |
| | Phone Number<br>415 828 5826 |
| Print Name<br>Karen Ferguson | Street Address<br>1913 Paru St, |
| Signature<br>Karen Ferguson | City, State, Zip Code<br>Alameda, CA 94501 |
| | Phone Number<br>(510) 332-3076 |

| Name | Address |
|---|---|
| Print Name<br>Raquel Zavaleta | Street Address<br>2396 Post Street |
| Signature<br>Raquel Zavaleta | City, State, Zip Code<br>SF, CA 94115 |
| Print Name<br>Yadira Becerra | Phone Number<br>? |
| Signature | Street Address<br>1200 Alpine Rd #43 |
| | City, State, Zip Code<br>Walnut Creek, CA 94596 |
| | Phone Number<br>(925) 932-8541 |
| Print Name<br>Akilah Jeffery | Street Address<br>4110 Reinhardt Dr. |
| Signature<br>Akilah Jeffery | City, State, Zip Code<br>Oakland, CA 94619 |
| | Phone Number<br>(510) 531-8826 |
| Print Name<br>Carmen Liu | Street Address<br>166 Athol Ave #109 |
| Signature | City, State, Zip Code<br>Oakland, CA 94606 |
| | Phone Number<br>(415) 279-9984 |
| Print Name<br>Betty Blue | Street Address<br>1235 Georgetown Ave |
| Signature<br>Betty Blue | City, State, Zip Code<br>San Leandro, CA 94579 |
| | Phone Number |
| Print Name | Street Address |
| Signature | City, State, Zip Code |
| | Phone Number |

| Name | Address |
|---|---|
| Print Name Jacob Lucas | Street Address 2521 Columbia Ave. |
| Signature | City, State, Zip Code Richmond, CA 94804 |
| | Phone Number (510) 526-0963 |
| Print Name Eliza Strauss | Street Address 109 Germania St. |
| Signature Eliza Strauss | City, State, Zip Code SF CA 94117 |
| | Phone Number (415) 310-1948 |
| Print Name LELYAN SEGALBO | Street Address 4211 Chapalla Way |
| Signature Segalbo | City, State, Zip Code Union City, CA 94587 |
| | Phone Number 510/487-2216 |
| Print Name Heather Sheppard | Street Address 2190 Bay St. Apt 105 |
| Signature H Sheppard | City, State, Zip Code San Francisco, CA 94123 |
| | Phone Number 949.874.8869 |
| Print Name | Street Address |
| Signature | City, State, Zip Code |
| | Phone Number |
| Print Name | Street Address |
| Signature | City, State, Zip Code |
| | Phone Number |

| Name | Address |
|---|---|
| Print Name Latanya Brown | Street Address 2945 Millsbrae Ave |
| Signature | City, State, Zip Code Oakland, CA 94605 |
| | Phone Number |
| Print Name | Street Address |
| Signature | City, State, Zip Code |
| | Phone Number |
| Print Name | Street Address |
| Signature | City, State, Zip Code |
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| Print Name | Street Address |
| Signature | City, State, Zip Code |
| | Phone Number |
| Print Name | Street Address |
| Signature | City, State, Zip Code |
| | Phone Number |

# Affirmations

As the authorized lead petitioner I, Kevin Wooldridge, hereby certify that the information submitted in this petition for the renewal of Education for Change at Cox Elementary (Cox), located within the boundaries of the Oakland Unified School District, (OUSD) is true to the best of my knowledge and belief; I also certify that this petition does not constitute the conversion of a private school to the status of a public charter school; and further, I understand that if awarded a renewed charter, Education for Change at Cox Elementary:

- Shall meet all statewide standards and conduct the student assessments required pursuant to Education Code Section 60605 and 60851 and any other statewide standards authorized in statute or student assessments applicable to students in non-charter public schools. [Ref. Education Code Section 47605(c)(1)]
- Shall be deemed the exclusive public school employer of the employees of Education for Change at Cox Elementary for purposes of the Educational Employment Relations Act. [Ref. Education Code Section 47605 (b)(5)(O)]
- Shall be nonsectarian in its programs, admissions policies, employment practices, and all other operations. [Ref. Education Code Section 47605(d)(1)]
- Shall not charge tuition. [Ref. Education Code Section 47605(d)(1)]
- Shall admit all students who wish to attend Education for Change at Cox Elementary, and who submit a timely application, unless Education for Change at Cox Elementary receives a greater number of applications than there are spaces for students, in which case each application will be given equal chance of admission through a public random drawing process. Admission to Education for Change at Cox Elementary shall not be determined according to the place of residence of the student or his or her parents within the State except as provided in Education Code Section 47605(d)(2). Preference in a public random drawing shall be provided as described in Education Code Section 47605(d)(2)(B). In the event of a drawing the chartering authority shall make reasonable efforts to accommodate the growth of the Charter School in accordance with Education Code Section 47605(d)(2)(C). and Education Code Section 51747.3. [Ref. Education Code Section 47605(d)(2)(A)-(B)]
- Shall not discriminate on the basis of the characteristics listed in Section 220 (actual or perceived disability, gender, nationality, race or ethnicity, religion, sexual orientation, or any other characteristic that is contained in the definition of hate crimes set forth in Section 422.55 of the Penal Code or association with an individual who has any of the aforementioned characteristics). [Ref. Education Code Section 47605(d)(1)]
- Shall adhere to all provisions of federal law related to students with disabilities including, but not limited to, Section 504 of the Rehabilitation Act of 1973, Title II of the Americans with Disabilities Act of 1990 and the Individuals with Disabilities in Education Improvement Act of 2004.
- Shall meet all requirements for employment set forth in applicable provisions of law, including, but not limited to, credentials, as necessary. [Ref. Title 5 California Code of Regulations Section 11967.5.1(f)(5)(C)]

- Shall ensure that teachers at Education for Change at Cox Elementary hold a Commission on Teacher Credentialing certificate, permit, or other document equivalent to that which a teacher in other public schools is required to hold. As allowed by statute, flexibility will be given to non-core, non–college preparatory teachers. [Ref. California Education Code Section 47605(l)]
- Shall at all times maintain all necessary and appropriate insurance coverage.
- Shall, for each fiscal year, offer, at a minimum, the number of minutes of instruction per grade level as required by Education Code Section 47612.5(a)(1)(A)-(D).
- Shall notify, within 30 days, the superintendent of the school district of any pupil who is expelled or leaves Education for Change at Cox Elementary without graduating or completing the school year for any reason. The school district notified shall be determined by the pupil's last known address. Education for Change at Cox Elementary shall, upon request, provide that school district with a copy of the cumulative record of the pupil, including a transcript of grades or report card and health information. [Ref. California Education Code Section 47605(d)(3)]
- Will follow any and all other federal, state, and local laws and regulations that apply to Education for Change at Cox Elementary including but not limited to:

    - Education for Change at Cox Elementary shall maintain accurate and contemporaneous written records that document all pupil attendance and make these records available for audit and inspection.
    - Education for Change at Cox Elementary shall on a regular basis consult with parents and teachers regarding Education for Change at Cox Elementary's education programs.
    - Education for Change at Cox Elementary shall comply with any jurisdictional limitations to locations of its facilities.
    - Education for Change at Cox Elementary shall comply with all laws establishing the minimum and maximum age for public school enrollment.
    - Education for Change at Cox Elementary shall comply with all applicable portions of the No Child Left Behind Act.
    - Education for Change at Cox Elementary shall comply with the Public Records Act.
    - Education for Change at Cox Elementary shall comply with the Family Educational Rights and Privacy Act.
    - Education for Change at Cox Elementary shall comply with the Ralph M. Brown Act.
    - Education for Change at Cox Elementary shall meet or exceed the legally required minimum of school days.
    - Education for Change at Cox Elementary shall comply with Article 5.5 (sections 51745–51749.3) of Chapter 5 of Part 28 of the Education Code and implementing regulations adopted thereafter for the purpose of implementing short term independent study.

- Education for Change shall be deemed the exclusive public school employer of the employees of Education for Change at Cox Elementary for purposes of the Educational Employment Relations Act. [Ref. Education Code Section 47605 (b)(5)(O)]

*Kevin Wooldridge, CEO, Education for Change*

# Table of Contents


Affirmations ..... 4
History and Accomplishments ..... 8
Management Team ..... 9
Accomplishments ..... 10
Educational Philosophy and Program ..... 13
- Mission ..... 13
- Vision ..... 13
- Becoming a 21st Century Learner ..... 13
- How Learning Best Occurs ..... 14
- Students to be served ..... 15
- Curriculum and Instructional Design ..... 16
- Methods of Instruction ..... 17
- Curriculum Overview ..... 20
- Retention/Promotion Policy ..... 30

Plan for Special Education ..... 32
Plan for English Learners ..... 35
Plan for Students Who Are Academically Low Achieving ..... 38
Plan for Students Who Are Academically High Achieving ..... 43
- Schedule and Academic Calendar ..... 43
- Annual School Calendar ..... 45

Parental Involvement ..... 45
Community Involvement ..... 47
Professional Development ..... 47
MEASURABLE STUDENT OUTCOMES ..... 53
Methods of Assessment ..... 55
Governance Structure ..... 61
Qualifications for School Employees ..... 71
- Staff Evaluation Plan ..... 76

Employee Rights ..... 79
Labor Relations ..... 79
Employee Return Rights ..... 80
Health and Safety ..... 80
Dispute Resolution Procedures ..... 81
Admissions Requirements ..... 84
Racial and Ethnic Balance ..... 85
Public School Attendance Alternatives ..... 86
Suspension/Expulsion Procedures ..... 86
FINANCIAL PLANNING, REPORTING, AND ACCOUNTABILITY ..... 103
Administrative Services ..... 104
Facilities ..... 106
Financial Audit ..... 107
School Closure Protocol ..... 108
IMPACT ON THE CHARTER AUTHORIZER ..... 111
MISCELLANEOUS PROVISIONS ..... 112
Appendices ..... 114

## History and Accomplishments

Founded in 2005 by experienced educators and entrepreneurs, Education for Change (EFC) is a nonprofit public benefit corporation. As a Charter School Management Organization, EFC operates public elementary schools designed to offer a high quality education at no cost to parents. EFC serves ethnically and economically diverse student bodies. EFC currently operates three schools in Oakland, California: Education for Change at Cox Elementary, World Academy, and Achieve Academy.

The mission of Education for Change is straightforward. We provide a superior public education to Oakland's most underserved children by maintaining a system of public schools that relentlessly focuses on our students' academic achievement. Our high quality instruction, and its continuous refinement, leads to success for our students.

When our students succeed, they will be prepared to make thoughtful and informed choices that will set them on a path for a successful life. Through the success of our students, we will create a catalytic change across the country that will help to transform urban public schools into high performing organizations for the children that are most dependent upon them.

At Education for Change our core beliefs are the foundation for our organization. We have built strict and deliberate screens into our hiring process to ensure that we hire individuals who share our beliefs about what makes a great school - and what it takes for all children to succeed in school and in life. We believe that organizations can only be successful when people are aligned around a common purpose and a shared set of goals. This applies to our schools, and to Education for Change as a whole.

Through a shared set of core beliefs, we are building one community of adults across multiple schools that share responsibility for the EFC mission. Our core beliefs are the following:

1. Every child has a right to a high quality, free, public education.
2. Every student can learn and succeed at high levels.
3. The most important attribute of successful schools is the ability to have consistently high quality instruction in every classroom.
4. Building a professional learning community is the key to our schools' success.
5. Every child will succeed when a school is organized around a coherent, comprehensive, rigorous, standards-based curriculum, and school leaders make decisions about how to improve instruction based on data.
6. The best measure of what we value is how we spend our time.
7. Every adult within the school community - principals, teachers, staff, parents/guardians, and administrators - is responsible for student performance.

## Management Team

The founding team of Education for Change came together with the goal of blending a diverse background of professional and personal experience. The Education for Change management team blends professional experience across public education, the public sector, for-profit and nonprofit organizations, business, and the philanthropic world. Our team brings the best practices from these many sectors to accomplish our ambitious goals and our mission.

After five years, Education for Change is still focused on opening K–5 elementary schools in the City of Oakland that will share one educational design, and one support infrastructure, across all EFC schools. A shared infrastructure based on one educational model helps us achieve our most important organizational objectives:

1. Prove that a system of urban public schools can succeed with all students at high levels
2. Build a sustainable and financially sound system of public schools
3. Create lasting change in urban public education across the country

**EFC Management Team**

**Kevin Wooldridge, Founder and Chief Executive Officer**
Kevin Wooldridge was most recently an Executive Director in the Oakland Unified School District supervising 13 elementary schools. He has been a bilingual educator for 29 years, working in three Bay Area school districts at school sites, including 12 years as a site administrator and several years as a senior central office administrator. Mr. Wooldridge has a master's degree in Education and serves on the state of California's Curriculum Commission. He also has many years of experience implementing and supporting programs that use the arts to extend and enhance core literacy and English language development programs. In addition, Mr. Wooldridge has been a speaker at both state and national conferences on Bilingual Education, Full Inclusion, and Educational Leadership and is currently a member of the executive committee of the Voices for African American Students Committee.

**Jessica Evans, Chief Academic Officer**
Jessica Evans was formerly the Director of Elementary Education for the Oakland Unified School District (OUSD). Dr. Evans has focused on improving instruction in reading/language arts, English language development, and mathematics. She instituted site-based professional development through the Collaborative Inquiry Cycle and Lesson Design Study. Dr. Evans also served as principal of La Escuelita Elementary School. An experienced educator, Dr. Evans has served as a lecturer at UCLA in reading methods and as a research assistant in the education evaluation firm Education Matters, Inc. She holds a B.A. from Stanford University, a M.Ed. from UCLA, and a M.Ed. and doctorate from Harvard University.

**Fabiola Harvey, Chief Operating Officer**
Previous to joining Education for Change, Ms. Harvey served as the Area Financial Manager for the Las Vegas Cluster of Edison Schools. She led start-up and business operations for 7 schools with over 6,000 students and 500 employees in the Clark County School District. This was the first time that the district awarded a cluster of schools to be managed by one Charter Management

Organization. Prior to working in Las Vegas, Ms. Harvey was the Business Manager for one of the most troubled schools in the San Francisco Unified School District. At Edison Charter Academy, Ms. Harvey was able to turn around a difficult financial situation and get the school on a firm financial footing. Ms. Harvey brings with her a wealth of experience and a long-standing commitment to urban education.

**Ena A. Harris, Director of Site Services and the Essentials Initiative**
After serving Oakland Public Schools for fourteen years, Ena joined the Education for Change team. She was formerly a Speech Therapist, Parent Coordinator, Head Start Director, Math Teacher and Assistant Principal in New York, Indiana, Wisconsin and the Mt. Diablo School District. She served as principal at Martin Luther King, Jr Elementary School for five years and nine years at Garfield Elementary School in the Oakland Unified School District. She spends one week of each year as a team leader for principals in the Association of California Administrators (ACSA) Summer Institute at UCLA.

## Accomplishments

(Please see appendix # 1, Renewal Performance Report, for more graphs and details of academic performance.)

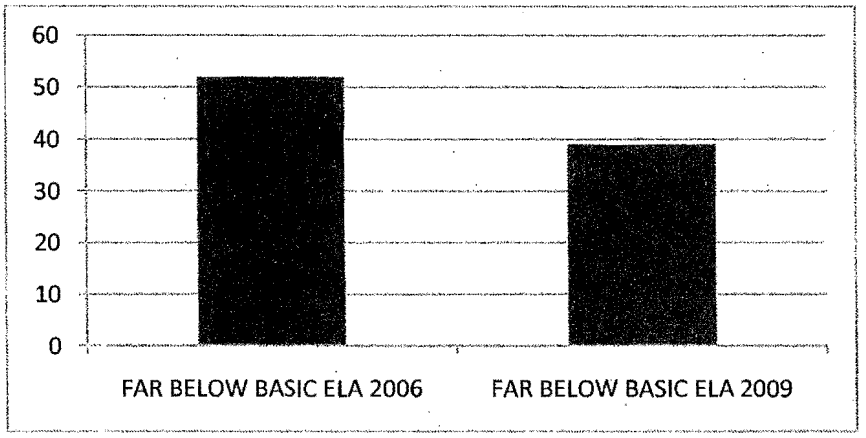
Parent Satisfaction

Parent surveys demonstrate strong support for the Education for Change at Cox Elementary program:

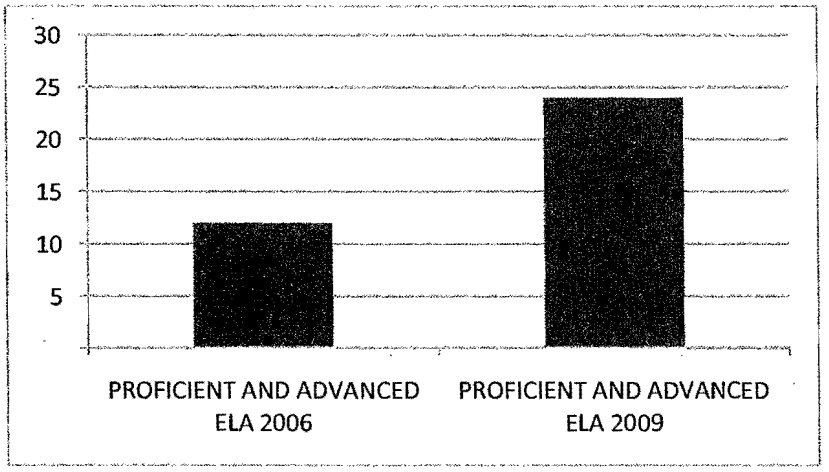
- 97% of parents agreed or strongly agreed that the school was going a good job educating their child
- 85% of the parents agreed or strongly agreed that the school was safe
- 91% of parents agreed or strongly agreed that they felt welcomed and respected at the school
- 97% of parents surveyed gave the school either an A or a B for an overall schoolwide grade
- Attendance has increased over the last four years from 93.4% to over 95.5%

Academic Performance

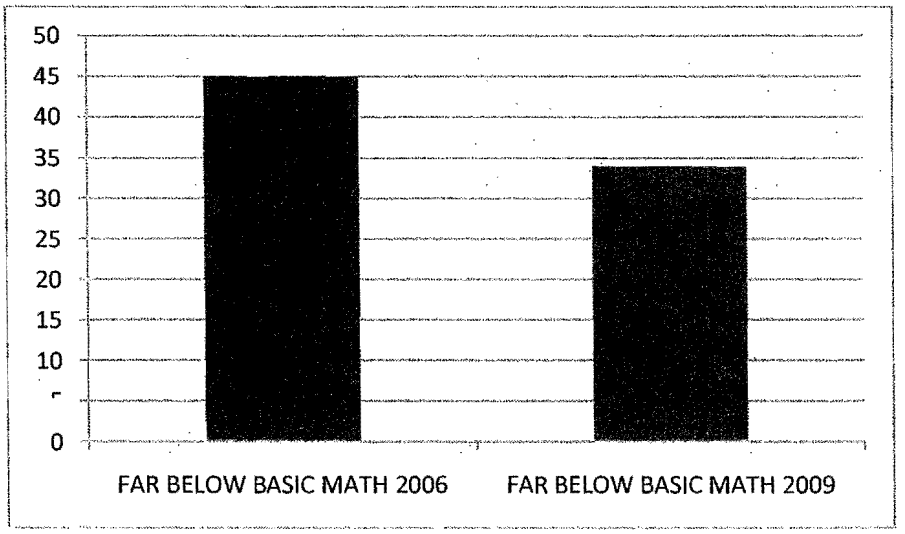
- In 2006, Education for Change at Cox Elementary had 52% of students Far Below Basic and Below Basic in ELA. By 2009, Education for Change at Cox Elementary lowered the number of student performing Below Basic and Far Below Basic in ELA by 13% to 39%.



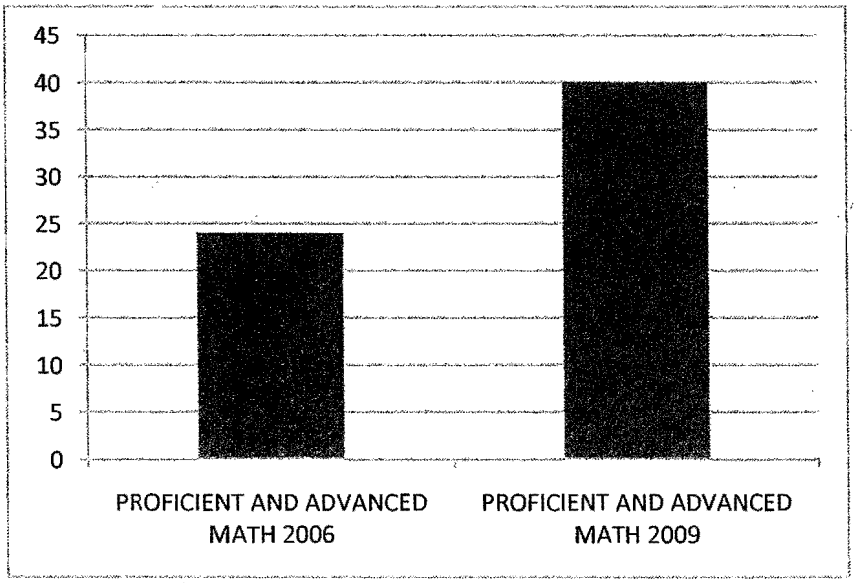

- In 2006, Education for Change at Cox Elementary had 12% of students Proficient and Advanced in ELA. By 2009, Education for Change at Cox Elementary increased the number of student performing Proficient and Advanced in ELA by 12% to 24%.




- In 2006, Education for Change at Cox Elementary had 45% of students Far Below Basic and Below Basic in Math. By 2009, Education for Change at Cox Elementary lowered the number of student performing Below Basic and Far Below Basic in Math by 11% to 34%.




- In 2006, Education for Change at Cox Elementary had 24% of students Proficient and Advanced in Math. By 2009, Education for Change at Cox Elementary increased the number of student performing Proficient and Advanced in Math by 16% to 40%.




## Other Accomplishments

- All of Education for Change at Cox Elementary audits have been free of findings.
- Education for Change at Cox Elementary has received $135,000 in grants in addition to the Cox share of the $3.6 million awarded to Education for Change by the New Schools Venture Fund.

## Educational Philosophy and Programs

Governing Law: A description of the educational program of the school, designed, among other things, to identify those whom the school is attempting to educate, what it means to be an "educated person" in the 21st century, and how learning best occurs. The goals identified in that program shall include the objective of enabling pupils to become self-motivated, competent, and lifelong learners.--California Education Code Section 47605(b)(5)(A)

### Mission

*Education for Change's mission is to:*
Provide a superior public education to Oakland's **most underserved children** by creating a **system** of public schools that relentlessly focuses on the **continuous refinement** of **high quality instruction.**

### Vision

When we succeed in building a high performing system of public schools serving the most underserved students, we will make the changes necessary for success to be replicated across every urban public school.

### Becoming a 21st Century Learner

Through collective student, parent and faculty adherence to the EFC's mission, the school provides outstanding academic and personal opportunities for all its students. At Cox, becoming a 21st century learner means:

- Students possess a strong foundation of basic academic skills and a broad knowledge base in the core disciplines of reading/language arts, mathematics, science, and social studies;
- Students are effective and confident communicators, and are comfortable utilizing a wide range of technologies;
- Students are critical thinkers and problem solvers;
- Students have an appreciation for the humanities and show respect for diverse cultures;
- Students possess a lifelong love of learning;
- Students possess a strong desire to serve the community in which they live; and
- Students have the desire, discipline, and dedication to achieve their highest aspirations and dreams.

The school successfully links regular classroom instruction by operating a traditional school program, providing instruction by a dedicated faculty, and implementing a unified curriculum interwoven throughout the day. These strategies serve our goal of enabling pupils to become self-motivated competent lifelong learners, who understand that learning that continues throughout their lifetime will give them the greatest prospects for achieving fulfilling lives in the 21st century.

By serving students in grades kindergarten through five, the school plays an integral role in building this love of lifelong learning in all its students.

## How Learning Best Occurs

Education for Change believes good teaching through a coherent, rigorous curriculum in an environment focused on continual improvement and learning leads to high student achievement. Coupled with this approach to academics, EFC schools are populated with students, staff, and families that agree with EFC's mission and come together as a larger community to build and support the elements necessary for all students to succeed.

EFC has achieved our mission by focusing on:

1. **High Quality Teaching.** Every student deserves a high quality teacher in the classroom. EFC teachers are committed to the belief that every student can achieve. EFC expects a commitment on the part of its teachers to continually strive toward high level implementation of the core curriculum and high levels of student engagement. Differentiated instruction and scaffolding to enable all students to access the core curriculum are vital components of high quality instruction. Teachers work as a team to analyze assessments and utilize the resulting data systematically to inform instructional practices.

The goal of EFC is to create powerful, collaborative learning communities where high quality instruction is the ultimate goal. Through a practice-based professional development model, data analysis, coaching, cognitive planning, and grade level planning, teachers collaborate with their colleagues to share their successes and challenges, to deepen their knowledge of instructional designs, and to continually work toward improving their instruction.

2. **Extended Time for Collaboration and Learning.** All teachers have additional professional development and dedicated collaboration time to improve their instructional practices. Each EFC-managed school has an Instructional Leadership Team composed of the school's administration, instructional coaches, and representative grade level chairs that guides the work of improving teaching and learning. The Instructional Leadership Team is subdivided into a literacy team and a math team.

EFC students also participate in extended learning opportunities. These opportunities align after-school instructional programs with core instructional needs. They encourage students to acquire the academic knowledge and skills as well as broad extracurricular experiences that will prepare them for middle school and high school.

3. **Coherent, Comprehensive, Rigorous Standards-Based Curriculum.** No school succeeds without focus, especially one with educationally underserved students. EFC implements a core curriculum using Open Court Reading and Saxon Mathematics. Science is a focus in the upper grades, where inquiry deepens and students learn the scientific method. Additionally, science and social studies are offered as integrated components of the Open Court curriculum, where themes traverse subject areas. We coordinate this curriculum with supplemental arts through a partnership with the Museum of Children's Art (MOCHA). (See Visual Arts section for status)

4. **Choice and Commitment.** Students, their parents, and the faculty and administration are part of the school by choice. No one is assigned or forced to attend the school. Everyone must make and uphold a commitment to the school and to each other to do what is required to achieve success. While no child is assigned to the school, EFC is deeply committed to serving the children in the neighborhood. Thus, all students who are interested in the school are welcomed, unless the school is at capacity.

5. **Engagement of Community.** EFC is an Oakland-based organization and as such is intent on engaging each school community and collaborating with local partners. Lifelong learners are not just cultivated within the boundaries of the classroom or solely through the study of the core subjects. Cox sponsors a number of community events to encourage students to interface with the community including Autobiography Day, Expos, and traditional events such Back to School Night and Open House.

In order for true success for the larger student body to be achieved, the school engages in dialogue and partnership with its community, reaching out to engage parents and other community members who often have not participated in the school community. One of our strongest community partnerships is with the Creekside Church in San Leandro. They have participated in school cleanups, preparation of instructional materials, teacher appreciation days as well as weekend "fix your bike" clinics. In addition to the church, Education for Change at Cox Elementary has partnerships with the following organizations:

- East Bay Agency for Children
- Museum of Children's Art
- Alameda County Office of Education
- California State University East Bay
- PlayWorks (Formerly Sports4Kids)

## Students to Be Served

In order to achieve the Education for Change mission and vision, Education for Change at Cox Elementary serves an ethnically diverse student population and a high number of socioeconomically disadvantaged students and English Language Learners.

| Group | Percent |
|---|---|
| African American | 27.72 % |
| American Indian or Alaska Native | 0.18 % |
| Asian | 1.81 % |
| Filipino | 0.36 % |
| Hispanic or Latino | 66.3 % |
| Pacific Islander | 3.62 % |

| Group | Percent |
|---|---|
| White (not Hispanic) | 0 % |
| Socioeconomically Disadvantaged | 92 % |
| English Learners | 67 % |
| Students with Disabilities | 6 % |
| Total Number of Students | 552 |

Education for Change at Cox Elementary serves a higher number of Latino students and fewer African American students than Oakland Unified School District. Oakland Unified School District serves 70.6% English Language Learners, roughly 3% more than Education for Change at Cox Elementary.

OUSD from 2008 CBEDS:

| American Indian or Alaska Native | Asian | Pacific Islander | Filipino | Hispanic or Latino | African American | White (not Hispanic) | Free and Reduced Price Lunch |
|---|---|---|---|---|---|---|---|
| 176 (0.4%) | 6,232 (13.4%) | 495 (1.1%) | 369 (0.8%) | 17,354 (37.3%) | 16,165 (34.8%) | 3,019 (6.5%) | 70% |

## Curriculum and Instructional Design

Presenting every student with a rigorous and coherent curriculum and high expectations for achievement is the foundation for learning. We believe the solid, research-based curriculum from Open Court and Saxon Math supplemented with instructional enhancements blends a number of demonstrated successful approaches to higher achievement. Through a "Workshop" model, EFC emphasizes differentiated instruction to better meet each student's needs and deliver a much more personalized and effective educational experience for every student.

Research demonstrates that building connections with adults, especially with dedicated and motivated teachers, also consistently leads to higher achievement. All EFC teachers work with students utilizing assessment data to personalize the learning experience and target difficulties to be overcome. On a daily basis, teachers are held accountable for cognitively planning and delivering lessons that are aligned to EFC's instructional program and that address students' instructional needs. Expert coaching and classroom observation as well as regular monitoring and support by the school's administrative team provide opportunities to improve instruction at Cox.

EFC's curriculum objectives are aligned to the California Content Standards adopted by the California State Board of Education. The school's focus is not to change what the state feels are appropriate academic outcomes, but rather to ensure that all students master all areas of the California Content Standards. The California Content Standards have been combined with the pedagogical methodologies that have proven successful in other charter and traditional district schools. Clear and specific academic objectives are mastered at each grade level as students move through the curriculum at EFC's intensified level of rigor, addressing both the grade level standards and intensive intervention for those not at grade level.

The content of the curriculum focuses on the introduction and mastery of critical skills, coupled with an emphasis on higher order thinking processes in all content areas. In alignment with state standards, EFC provides grade-appropriate curriculum for Mathematics, Science, English–Language Arts, and History–Social Science. See Science and Social Science sections for description of these curricular areas. Intervention is available at all grade levels in Math and English–Language Arts.

While Education for Change at Cox Elementary has selected specific standards-based curriculum and is committed to full implementation, should this effort not yield the high level results we expect, EFC reserves the right to change curriculum and instructional materials to meet the needs of our student population throughout the term of our charter.

## Methods of Instruction

EFC works with the school to develop instructional methods that will successfully maximize student learning. Students acquire the knowledge and skills needed to pursue academic excellence, as well as the ability to independently apply, evaluate, and expand upon their knowledge.

As mentioned previously, Open Court Reading and Saxon Math form the foundation of EFC's curriculum. Specific training and professional development for all staff on these research-proven methods and instructional designs occurs on a regular basis via formal EFC-provided professional development and coaching as well as informal school-based collaboration specific to the needs of that school's community.

Instructional models that teachers are expected to learn and incorporate into their practice include strategy instruction, direct instruction, mnemonics, writing process, inquiry instruction, and concept formation. Examples of instructional techniques that the school implements include whole class instruction, small group instruction, individualized instruction, small group and whole class discussion, multiple representations of mathematical concepts, phonetics-based instruction, balanced literacy, and research and inquiry projects. During Unit Openers and Wrap Ups, students often have the opportunity to extend their learning through study tours. Examples of study tours that teachers have shared with students to introduce a new topic include the Chabot Science Center and the Oakland Museum.

Cox has focused heavily on increasing the level of student engagement implementing a number of specific strategies designed to maintain high levels of engagement. For instance, teachers are expected to use strategies like Think-Pair-Share as a regular part of their lessons to ensure that all students consistently and actively participate in all aspects of classroom discussions.

EFC defines student engagement in the same terms that West Ed does ". . . the continuous, active involvement of students in the academic learning" (WestEd). Cox Academy has focused heavily on increasing the level of student engagement by implementing a number of specific strategies designed to maintain high levels of engagement in academic tasks that ensure the cognitive load is on the student. The initial set of strategies teachers have received training on were cross-curricular in nature. These included:

- Think-Pair- Share- The teacher or a student asks a question. Students are given quiet time to think of their answer, and then the turn to their partner and discuss their answers. As students discuss, the teacher monitors the room listening in to conversations and giving feedback. The teacher then calls on students to share what they discussed in their pair.
- Numbered Heads Together- This strategy is a variation on Think-Pair-Share where students are in small groups and are given a question to discuss. Each member of the group is given a number, but no one knows who will be called on by the teacher. At the end of the discussion time, one person from each group is called on by number to report out on the group discussion.
- Equity Sticks- The teacher has each of the student's names written on a stick or card and pulls the stick randomly to select the person who will give the answer. This strategy is often used after Think-Pair- Share.
- Choral responses- A teacher or student asks a question and then students are asked to respond all together. This may take the form of oral response, showing the answer on their fingers for either a numerical answer or one that is multiple choice, problem solving and/ or writing their answer on a small white board and showing it at the same time, using hand signals to show the answer or whether they agree with the answer.
- Handing-off discussions– This student led discussion where one student poses a question or a statement and other students respond to that statement or question, handing off to one another until the conversation comes to a natural conclusion. Then another student would initiate another topic of discussion. This type of discussion can be utilized in a small cooperative group discussion or in a whole class discussion. This also is called response-chaining (Marzano 2009).

Teachers at EFC are expected to set the requirement that all students are actively engaged in the academic instructional activities. Embedded within the Open Court and Saxon instruction are the components of high level academic engagement that the teachers will explicitly teach and require students to utilize. Using Marzano's framework, Education For Change's professional development on student engagement will focus on the following strategies:

| **Marzano's Strategy** | **Where it is explicitly taught** | **Where it is practiced** |
|---|---|---|
| **Identifying Similarities and Differences** | During Open Court comprehension skills lessons students are taught to compare and contrast and classify and categorize | Reading the Open Court anthology<br>Independent reading<br>Comparing and contrasting of science concepts.<br>In our new approach to Social Studies, students will be asked to compare and contrast and classify and categorize information. |
| **Summarizing and Notetaking** | During Open Court comprehension strategy | Students practice summarizing during Open Court instruction, |

| | | |
|---|---|---|
| | lessons, students are taught to summarize the main ideas of a text.<br>As an EFC enhancement of the Saxon lessons, starting in grade 3, students are explicitly taught how to take notes. Students also keep and take notes in their Writing Notebook. | science and social studies instruction. Students are expected to take notes during class instruction, specifically for Math and writing and to utilize their notes as a reference tool during homework and classwork. These notes are checked for quality and organization by the teacher. |
| **Non-linguistic representations** | Students are explicitly taught visualizing during the comprehension strategy instruction lessons.<br>Graphic organizers are utilized during both comprehension strategy and skill instruction.<br>Students are taught and practice using multiple representations of algorithms during mathematics instruction. | Students practice utilizing the graphic organizers taught during the comprehension instruction, in their writing process.<br>Students use multiple representations in completing all math work. |
| **Generating and Testing Hypothesis** | Students are taught about generating and testing hypothesis/ conjectures as part of both inquiry instruction in Open Court (Please see Inquiry Rubric in appendix # 21) and through their science instruction. | Students practice generating and testing hypothesis/ conjectures as they complete their inquiry project.<br>Students develop hypothesis as a part of the science experiments they conduct. |
| **Cues, Questions, and Advance Organizers** | Students preview the content in Open Court through Clues, Problems and Wonderings and generate questions to guide their reading. In addition, both the Asking Questions strategy and the Focus Questions, guide students' reading of the text.<br>Students' prior knowledge is activated through the Building Background component. | Students practice asking questions during the Clues, Problems and Wonderings, as well as throughout the selection, using the asking questions strategy.<br>Students are asked to discuss the wonderings, questions and Focus questions during handing-off discussions.<br>Previewing and cueing strategies taught in Open Court will be utilized with other texts, including Science and Social Studies. |

| | | |
|---|---|---|
| **Cooperative Learning** | Students engage in cooperative learning activities through their Theme Connections discussion, handing off discussions (response-chaining discussions), and during numbered heads together activities. | Students practice these strategies during any small group discussion of the Open Court anthology and during small group Math instructional activities.<br>In our new approach to Social Studies, students will be conducting handing off / response-chaining discussion in small groups to discuss critical thinking questions. |
| **Setting Objectives and Providing Feedback** | Teachers are clear about objectives for each lesson so students know what is expected of them.<br>Teachers also teach the rubrics (Please see appendix # 21 for rubrics). For instance, teachers teach and model their expectations for reading fluently (accuracy, rate, and prosody). Teachers explicitly teach the student friendly writing rubric (Please see appendix # 21.a). | For instance, during reading, students are aware of the unit's fluency expectations and their fluency rate Literacy Team members are piloting prosody rubrics (Please see appendix # 21 for prosody rubric and checklist). Students know where they are and what they need to do to get to the next fluency level.<br>Teachers monitor student reading and give explicit feedback and/ or small group instruction based on the informal data.<br>Students know where they are on the Writing Rubric (Please see appendix # 21) and what they need to do to go to the next level. Teacher feedback is tied directly to the rubric. |
| **Homework and Practice** | During Saxon Math instruction, problems just like those on the homework are covered in class.<br>Students are given homework in English Language Arts that allows students to practice strategies and skills they have learned during direct instruction in the classroom. | Students practice what was learned during class time as part of their homework. They can use their notes and class work as a resource. |

Students whose needs have not been met through initial teaching benefit from a number of alternative instructional techniques. EFC specifically plans instructional mitigations to address areas of weakness identified in the analysis of our data. Please see appendix # 23, which outlines the process for identifying areas of need in mathematics and planning specific instructional mitigations to address them. A similar process occurs in English Language Arts. Teachers

continuously work together to enhance student learning by sharing, developing, and refining effective teaching strategies as part of this process and in grade-level meetings.

## Curriculum Overview

EFC is successful in teaching students to meet the California Content Standards due to EFC's fundamental elements of:

- Ongoing programs of professional development and coaching for teachers
- Curriculum and instruction as the focus of collaboration in the professional learning community
- Assessments of student progress during the school year to ensure effective instruction
- Creating systems and support to enhance the principal's ability to serve as the instructional leader
- Creating exciting climates within the schools to encourage learning

As an organization, we are fully committed to supporting all the structures that are critical to a deep, effective curricular implementation.

The curriculum framework described herein is based upon the California Content Standards for grades kindergarten through five.

| | SUBJECT | CURRICULUM |
|---|---|---|
| K-5 | Math | **Saxon Mathematics**<br>It is the Saxon philosophy that mathematics instruction should build on prior learning. Learning is presented in increments, with sufficient time provided between increments for practice. Mathematics strands are integrated throughout the year rather than taught in insolated units.<br><br>In addition Education For Change supports teachers in enhancing key lessons to ensure all students development the deep conceptual understanding necessary to build a foundation for the future advanced study of mathematics.<br><br>The teachers and Math Coaches at EFC, guided by ACOE Math Coordinators, developed the Pacing Guide for implementation of the Saxon Program (Please see appendix # 16 for an example). This Pacing Guide focuses on the key standards and big ideas of mathematics. |
| K-5 | English Language Arts/Reading | **Open Court 2002/ Imagine It! (possible next adoption)**<br>Open Court maximizes students' opportunities to become successful readers by providing a balance of systematic direct instruction in sound and word recognition, guided practice, and application of skills with extensive reading of decodable text and authentic literature.<br><br>Through systematic, explicit instruction, Open Court Reading has organized lessons in the most logical and efficient way possible for teaching children to read and write with skill and confidence.<br>A committee of teachers and Reading Coaches, using teacher input, have developed EFC's Open Court Pacing Guide (Please see appendix # 16 for an example)<br><br>*Writing*<br>A committee of teachers and Reading Coaches developed an EFC Writing Pacing Guide based on the Open Court lessons. This Writing Pacing Guide includes greater levels of scaffolding and a deeper implementation of each phase of the writing process (Please see appendix # 16 for an example). |

| | | |
|---|---|---|
| K-5 | Social Science/Science | **Open Court Science and Social Studies Connection**<br>Many of the themes of Open Court are designed to support the development of background knowledge and develop inquiry and research in science and social studies content areas. This helps ensure that students receive a broad based education aligned with the California Content Standards.<br>Teams of teachers and coaches have made significant progress in the development of our Standards Connections document (Please see appendix # 20) and grade level plans. As part of this process, EFC is incorporating a list of books to be used as read alouds or supplemental student text to enhance OCR and to ensure science and social studies standards are covered.<br>**AIMS and Harcourt integration**<br>Upper-grade ($3^{rd}$- $5^{th}$) students participate in science lessons integrating the AIMS and Harcourt Science curriculum. |
| K-5 | English Language Development | **Language for Learning, Thinking, Writing**<br>The Language for Learning, Thinking, and Writing curriculum is a direct instruction model designed to effectively address the four areas of English Language Development. The curriculum is proficiency based rather than being grade level based. EFC uses the program placement assessments to ensure teachers are addressing student's specific levels of proficiency through departmentalized instruction. |
| 4-5 | Reading Intervention | **Language!**<br>Language! is an intervention curriculum designed to target students who are reading two or more years below grade level. The curriculum is designed to accelerate the students reading and language skills in the least amount of time possible to return them to the grade level core curriculum.<br>Students are selected based on CST scores, benchmark scores, and teacher referrals. Cox students participate during the core Language Arts block. |

***English–Language Arts***

The English–Language Arts program has fully implemented Open Court. Open Court provides a challenging and rewarding curriculum that is theme-based with wonderful literature and expository text that is culturally diverse and intellectually stimulating. A significant emphasis is placed on developing reading and writing skills. Education for Change at Cox Elementary is considering a potential change to the new McGraw-Hill program that is very similar to, an improved version of, the Open Court program called Imagine It!. Imagine It! has most of the same components described below.

The heart of the Open Court program as well as Imagine It! is research and inquiry. The reading and writing skills taught are the base to allow students to access the higher order thinking skills necessary for the research and inquiry component of the program. The goal is to have all children reading at grade level so that they can access the intellectual demands of grade level text in all subject areas. To this end, the English–Language Arts curriculum is rooted in the Open Court and Imagine It! reading program addressing all components of the reading process. This framework has been shown to be successful in many varied educational environments, but specifically with students with similar demographics to those attending Cox. Students leave the school with a mastery of the reading / language arts skills that are required of them in the most challenging middle schools.

Open Court Imagine It! is a research based reading / language arts program. Research on reading shows that successful readers receive:

- Systematic and explicit instruction in phonemic awareness, phonics, fluency, vocabulary, and reading comprehension strategies

- Ample opportunities for guided practice
- Systemic cueing of appropriate strategies in context
- Appropriate levels of scaffolding as children learn to apply new skills (Lyon 2004)

All of these components are included in the Open Court and the new McGraw-Hill Imagine It! curriculum.

Teachers utilize various instructional designs to explicitly teach students the strategies and skills that research shows good readers and writers have. For instance, when reading the selection, teachers teaching reading strategies model the metacognitive reading strategies and then have students use those strategies themselves to better understand the text with which they are interacting. Using the strategy instruction model, teachers increase students' ability to independently apply the strategies and skills as they increasingly become more fluent readers. Students' ability to build independence is critical to their ongoing achievement.

The Open Court program is a spiraling curriculum that builds students' skills throughout the year and is designed in such a way that skills from different sections are interconnected. For instance, a student may learn about author's point of view as part of the comprehension skills instruction while reading a selection and then later, in a writing section, be asked to write from a particular point of view. This instructional design allows students to build their knowledge and skills as they go through the program.

As this is a theme-based program, students continue to broaden their understanding of the theme with each selection that is read. This learning is captured on the Concept/Question Board. After each selection is read, students reflect on how that selection has added to their understanding of the theme and to pose new questions that they have as a result of reading the selection. The questions posed are revisited as the students are able to answer them. Questions that are of interest to students can then be utilized to further the research and inquiry component of the program as well as to spur classroom discussions.

The Open Court program has additional components that allow teachers to meet the needs of the learners in their classroom. "Workshop" is built into the program to allow teachers time to differentiate instruction for their students. Furthermore, the Intervention Guide, the English Language Learner Support Guide, Challenge and Re-teach all provide materials to support students whose needs range from needing scaffolding to access the core curriculum to needing extra enrichment to push them beyond the core curriculum. As parent engagement is crucial, the program also includes a home connection component, which allows parents to deepen students' understanding of the theme in the home.

***English Language Development***

Education for Change at Cox Elementary is implementing, for the 2009-2010 school year, Language for Learning, Thinking, Writing (LFLTW) by McGraw-Hill. The school had previously used the Hampton Brown Into English and Santillana series but found the results were not satisfactory. Teachers on the ELD Committee reviewed various ELD programs and determined that LFLTW would best meet the needs of the students.

English Language Learners (ELLs) at Cox receive daily ELD instruction. Research demonstrates that ELD instruction should include high levels of oral engagement with multiple opportunities to practice. The LFLTW curriculum emphasizes high levels of student oral participation ensuring all students have ample opportunity to practice both new vocabulary and language structures in an academic context. Grouping students by level of proficiency enhances the effectiveness of the program, maximizing students' development of critical language skills and linking language structures and skills to all core subjects.

All three levels use the same instructional method, direct instruction, coupled with ample opportunity for students to practice and continuously review. Each level focuses on the specific needs of the students placed at that level:

- Language For Learning focuses on basic academic vocabulary and sentence structure
- Language For Thinking focuses on using language structures for problem solving and thinking logically
- Language for Writing focuses on applying language structures to writing, especially with expository prose.

In addition to systematic and coherent ELD instruction provided through LFLTW, ELLs receive appropriate scaffolding and pre-teaching in the core content areas.

***Math***

The Education for Change schools originally used the Harcourt Brace math series but found that students were not achieving the necessary proficiency levels in math. The teachers, principals, and Home Office staff reviewed many programs and Education for Change at Cox Elementary is now implementing Saxon Math.

Saxon Math: A Hands-on Approach with a Difference

All new concepts are developed through hands-on activities and rich mathematical conversations that actively engage students in the learning process. Concepts are developed, reviewed, and practiced over time.

Why Saxon Works:

- Daily mixed practice
- Frequent, cumulative assessment
- Opportunities for connections, communication, and justification

Saxon Math approaches mirror the recursive structure that is successful in Open Court reading and writing. Saxon's innovative instructional approach breaks complex concepts into simpler increments, recognizing that smaller pieces of information are easier to teach and easier to learn. The instruction, practice, and assessment of those increments are systematically distributed across a grade level. The distributed approach ensures that students gain *and retain* critical thinking concepts and use them in real-world situations.

The Saxon math program emphasizes:

- Conceptual understanding and problem solving as the focus for mathematics instruction using meaningful and challenging problems
- Practice so computational and procedural skills become automatic
- Using concrete materials or pictorial models to develop conceptual understanding
- Using the following instructional model
    - Review of prerequisite skills
    - Direct instruction
    - Guided instruction
    - Guided practice
    - Independent practice
    - Frequent assessments
- Materials for pre-teaching, re-teaching, supporting ELLs, challenging advanced learners, and supporting special needs students

The primary focus of the EFC mathematics program Education for Change at Cox Elementary is the development of conceptual understanding of mathematics. This is approached with several very specific strategies: multiple representations of both concepts and procedures, enhancement of number sense through decomposition, side by side comparisons of algorithms and the systematic progression from the concrete to the semi concrete to the abstract.

Teachers model the metacognitive strategies for problem solving so that students can learn those strategies as well and then apply them to mathematics applications. Most recently, Education for Change at Cox Elementary hired an additional (among the three EFC schools) experienced math coaches to work with all teachers to enhance their delivery of the EFC mathematics program.

***Visual and Performing Arts***

Initially, EFC included visual arts professional development as one area of focus. After an in depth analysis of both initial student assessment data results and feedback from teachers it was apparent we needed to adjust our plan. Because of the number of teachers new to the profession and the depth of instruction needed to effectively serve our students, there has been a clear need to focus on math and language arts instruction.

We have now started to phase in MOCHA more extensively starting with kindergarten where there is an extended day which allows ample time to dedicate to arts instruction. MOCHA has developed curricula to support the themes of Open Court and the building blocks of visual arts. In other grades, due to the competing demands of core academic curricula, EFC has recognized that arts must be integrated in key areas of our program. EFC is committed to exposing all our students to the arts. Teacher grade level committees will be tasked with developing an implementation plan with EFC's Chief Academic Officer in the summer of 2010.

EFC's enrichment instructors expose students to a wide variety of experiences in the arts. At Cox, the Museum of Children's Art provides artists to instruct in our after-school arts programs.

Furthermore, classroom teachers seek out opportunities to infuse the arts into their instructional units. Unit Openers and Wrap Ups are often opportunities for students to participate in theme-related art activities. Other opportunities are embedded within the curriculum. For instance, students have written and performed their own plays and created the scenery or studied particular artists and their works.

***Science***

Students have the opportunity to learn science through the exploration of science related Open Court themes. To support the students in mastering all grade level standards, EFC has begun a process of identifying which standards are not adequately addressed as a part of OCR. EFC is in the process of developing a Standards Connections document which specifically identifies materials to be used to supplement the program. In addition, standards which would be better addressed through hands on activities are being identified to support all grade levels to achieve mastery of all standards. (Please see appendix # 20 for Standards Connections document and sample grade level plans.)

Planned committees work will be completed by August 2010 and implementation will begin in the fall of 2010.

In addition, upper grade students are taught science on a weekly basis, using an integration of the Harcourt Science textbook and AIMS activities. A science specialist instructs students in grades 3-5 on a weekly basis focusing on key standards. The science content provided through the Open Court themes places heavy emphasis on learning the processes and skills that students need in order to understand the basics of the scientific method and its implications. These processes (e.g. observing, sequencing, measuring, classifying, describing, experimenting, inferring, predicting) are valuable skills that can begin to be taught at the earliest age. These processes are learned through inquiry and the science connection lessons including but not limited to experimentation, investigation, and observation. Teachers look for opportunities to enhance the study of the science related theme through available resources in the community. For instance, during the 5th grade unit on Astronomy many classes participate in programs at the Chabot Space and Science Center such as Mars Exploration, Planet Trek, Red, Rover, Red Rover, Shooting Stars and Rocks from Outer Space, Challenger Learning Center, and Spaceship Earth.

| CHABOT SPACE & SCIENCE CENTER CLASS | READING UNIT | SUBJECT |
|---|---|---|
| Challenger Learning Center Missions | Unit 2 | Astronomy |
| Mars Exploration | Unit 2 | Physical Science |
| Micro Adventures Planet Trek | Unit 12 | Life Science Astronomy |
| Planet Trek Red Rover, Red Rover | Unit 2 | Astronomy Physical Science |
| Red Rover, Red Rover Shooting Stars and Rocks from Outer Space | Unit 2 | Physical Science Astronomy |

| | | |
|---|---|---|
| Shooting Stars and Rocks from Outer Space Spaceship Earth | Unit 2 | Astronomy Earth Science |
| Spaceship Earth | Unit 2 | Earth Science |

***History–Social Studies***

Similar to science, the social studies curriculum takes its lead largely from the Open Court themes. Learning to read, write, discuss, contemplate, and do research is structured around themes that are interesting and enriching at the different grade levels. Selections in the OCR anthology present different literary forms and address different social sciences standards. They are also chosen for their content, which ranges from affective topics (such as "stick to it," "being afraid," "kindness") to science-related themes, history themes, geography, and economics.

For instance, a kindergarten social studies standard is "students recognize national and state symbols and icons such as the national and state flags, the bald eagle, and the Statue of Liberty," and a whole unit of study, "Red, White, and Blue," in Open Court is dedicated to this study. Teachers supplement the Open Court instruction with art projects around the symbols as well as patriotic songs, read alouds, and reenactments. The theme serves both as a critical vehicle for building literacy skills and as a springboard for deeper exploration of the California grade level standards.

EFC has begun a process to clearly identify which standards are adequately covered through the study and investigation of themes which occurs as part of the implementation of the OCR program. Teams of teachers and coaches have made significant progress in the development of our Standards Connections document. As part of this process, we are incorporating a list of books to be used as read alouds or supplemental student text to enhance OCR. This will help ensure that standards which are not adequately covered in the core text are effectively and systematically addressed at each grade level, K - 5. In addition, standards which would be better addressed through hands on activities are being identified to support all grade levels to achieve mastery of all standards. (Please see appendix # 20 for Standards Connections document and sample grade level plans.)

Planned committee work will complete the development process by August of 2010 and implementation will begin in the fall of 2010.

The History-Social Science curriculum also focuses on the understanding of skills delineated in the standards. Students are expected to interact with the concepts of history/ social studies and to learn the critical thinking skills to engage in the inquiry and analysis necessary in this field. For the students to become active participants in society, they must be able to function effectively in group settings, and to focus on problem solving, analysis, and content. Students see their peers within the school as their family, and their class and various groups as a team. The History-Social Science curriculum and its implementation feature reinforcement of the values of teamwork, citizenship, and collective goal attainment.

***Physical Education***

The Physical Education program focuses on sports-related activities and exercises through PlayWorks to enhance physical fitness as well as after-school sports programs. Students develop competency in a variety of sports techniques, develop motor skills and coordination, and learn different strategies for different sports. The physical education program teaches students the essential skills for a variety of sports, beginning with the motor skills necessary and then building on those skills with the ultimate goal of students engaging in the sport itself.

EFC believes that competency and excellence in athletics can lead to confidence and mental well-being in life, and that team sports instill dedication and a sense of working for the collective good. The physical education program therefore focuses on improving the physical and mental health of the students as well as on building an understanding of and appreciation for collaboration and shared outcomes through structured recreational activities.

Currently, all first and second grade students are served by a PE specialist once a week. All Cox Academy students are provided with structured activities during morning and lunch recesses. In addition, classroom teachers team with the PlayWorks coach to support classroom activities and instruction approximately once every two weeks. EFC plans to continue supporting structured physical activities during recess. Organized sports activities will be provided as an option for after school activities.

***Instructional Technology***

Technology offers many tools to support high academic achievement in EFC schools. While technology is not a core curriculum class to be mastered for its own sake, modern technological tools should be employed to achieve specific curricular goals. Just as a calculator can assist with higher-level math equations, 21st century technologies should be utilized to achieve clear educational outcomes that are measurable, demonstrable, and non-technological in nature. Utilizing technology tools to enhance and improve instructional methods:

- Enhances individual achievement through assessment technologies;
- Enables teachers and students to effectively collaborate with others;
- Enables new forms of student research, inquiry and expression;
- Builds higher order thinking skills by allowing students to interact with information in multiple ways; and
- Facilitates professional development opportunities and enhance instructional support, including the organization and distribution of teacher lesson plans.

At Cox Elementary, we have a newly formed student technology lab. The computer lab is open for teachers to utilize with their class for everything from learning how to write email (a lesson in the OCR program) to doing research on the inquiry theme. Students are also offered a computer class during the after-school enrichment program using the lab facilities.

***Lifelong Learning Skills***

Academic skills are a critical element to life success and focus for EFC, but foundational life skills are also imparted with the academic curriculum. These contribute not only to learning, but to the development of well-rounded, productive citizens. EFC uses the Caring School Community (CSC) program from the Developmental Studies Center in Oakland as a resource to work toward developing these skills in the classroom, across the grades in the school, and with the families.

CSC strengthens students' sense of connection to school, a critical element for promoting academic motivation and achievement as well as reducing drug use, violence, and mental health problems. It draws on the work of child development theorists such as Ainsworth, Piaget, and Dewey. CSC was derived from the Child Development Project, a program of the Developmental Studies Center, whose effectiveness has been extensively studied over the past 20 years.

Students who experience their school as a community where their basic psychological needs for belonging, autonomy, and competence are met develop emotional attachments to their school. Consequently, they are committed to, and able to act on, the norms and values of the school. CSC's program has demonstrated positive effects on academic motivation, conflict resolution, and empathy for others, and lowered use of alcohol and marijuana, over multiple years of analysis. These effects endure into the middle school years.

Currently, teachers use class meeting lessons and the CSC lessons to build unity and guide students in setting norms and goals, creating plans, and making decisions. These meetings also create and strengthen students' social skills and their commitment to responsibility, helpfulness, and respect. Cross-age buddies teach students how to give and receive help, experiencing themselves as caring and competent individuals. An example of how this has been done within EFC is that upper-grade students have visited with their lower-grade buddies to share what they had been learning and to practice shared skills with their younger peers. Education for Change at Cox Elementary students will continue to have cross-grade-level buddies in the future.

Because the primary focus of Education for Change at Cox Elementary for the first five years has been academic intensity and improving basic academic skills of our students, the CSC program has been implemented slowly. Education for Change at Cox Elementary is committed to continuing to more fully implement the CSC program in the future.

EFC has established the 6 Ps as the fundamental expectations of EFC students as citizens of our community. The 6 Ps encapsulate expected social skills and work habits. The 6 Ps are reinforced by all staff, parents are informed of these expectations and students receive grades on the report cards in relation to these expectations. Principals focus on the 6 Ps as part of their Monday Morning meetings to further reinforce their importance. The 6 Ps are:

- Be Prompt
- Be Polite
- Be Proud
- Be Productive
- Be Prepared
- Be Positive

As staff promote and monitor each of the 6 Ps, students come to understand the full meaning of each one. For instance, Be Proud means that you will complete your schoolwork in a manner that:

- Pays attention to detail
- Is complete
- Is accurate
- Is neat

***Study Skills***

All students develop academic skills necessary to be successful in subsequent schools, including but not limited to:

- Research techniques
- Reading for a variety of reasons
- Note-taking skills
- Organizational skills
- Literary analysis

Teachers share numerous methods of organizational skills and note taking. They then review students' notebooks for organization of ideas and notes. Students in the upper grades are required to utilize the note-taking skills even in each math course in addition to their other core classes.

**Retention/Promotion Policy**

Mastery of the objectives at each grade level is the basis for promotion. Teachers assess a student's progress on a quarterly basis in order to gauge whether the student is mastering the objectives throughout the year.

This retention policy has been presented to and accepted by our parents, teachers, and staff. This policy was also Board-approved. It is aligned with California's Education Code sections 48070–48070.5.

Education for Change at Cox Elementary understands that the possibility of retaining any student is a very serious matter and retention should be the last intervention used to improve or enhance student's learning outcomes.

The following is the Education for Change (EFC) schools' policy regarding the retention of pupils in grades K–5:

This policy establishes the procedure to identify students who will be recommended for retention in their current grade based on their proficiency in core subjects:

(Grades 3–5) Students who fail to achieve the minimal level of proficiency (BASIC) in accordance with SBE Section 60648 on the CST (California Standards Test) in Mathematics or Reading and Language Arts;

(or)

(Grades K–2) Any student who is not at benchmark based on (1) reading benchmark assessments or (2) math benchmark assessments or (3) report card grades;

(or)

(Grades K-5) Any student who is more than one year behind grade level in mathematics or reading and language arts (as determined by a Far Below Basic or Below Basic score on the child's report card OR teacher assessment of the child's classroom performance and completion of the EFC retention screening matrix form indicating Far Below Basic or Below Basic performance)

Kindergarten students will be retained only if the teacher and parent are in agreement that retention is the best intervention to ensure student success.

An identified student who is performing below the minimum standard for promotion shall be recommended by the student's teacher for retention in their current grade *unless* the student's teacher determines in writing that retention is not the appropriate intervention for the student's academic deficiencies. The teacher's recommendation to promote is contingent upon a detailed plan to correct deficiencies. At EFC, the following steps will be taken prior to a student's being retained:

1. A letter shall be sent to the student's parent(s) or guardian(s) by May 1 of each school year informing them that their child is at risk of retention.
2. The teacher's evaluation shall be provided to and discussed with the student's parent(s) or guardian(s) and the principal *before* any final determination of pupil retention. The parent(s)/guardian(s) are informed at that meeting that their child is recommended for retention. This meeting is documented with an academic support plan signed by both the teacher and parent/guardian.
3. The principal shall make a decision regarding the recommended retention. Upon the acceptance or rejection of the above stated reports by the principal, a letter shall be sent within five school days to formally inform the student's parent(s) or guardian(s) of the principal's decision regarding the retention.
4. The parent(s) or guardian(s) shall have the right to appeal the decision to the Chief Academic Officer of EFC Schools. If the decision of the Chief Academic Officer is not in agreement with the parent(s)/guardian(s), the latter have the right to appeal directly to the EFC Board of Directors. This meeting will take place at the next regularly scheduled board meeting or by direction of the board president. Or the Board may form a committee to review the appeal and make a recommendation to the Board for approval at the next regularly scheduled meeting.

The program design of EFC is to ensure that all children succeed. Students who are in jeopardy of retention are individually counseled and given extra help in their specific areas of concern, both in class and through intervention offerings.

## Plan for Special Education

***Overview***

Education for Change at Cox Elementary shall comply with all applicable state and federal laws in serving students with disabilities, including but not limited to Section 504 of the Rehabilitation Act ("Section 504"), the Americans with Disabilities Act ("ADA"), and the Individuals with Disabilities in Education Improvement Act ("IDEIA").

Education for Change at Cox Elementary agrees to adhere to the policies, procedures, and requirements of the Oakland Unified School District as well as the Oakland Unified SELPA.

The Charter School shall be categorized as a public school of the District in accordance with Education Code Section 47641(b).

The Charter School shall comply with all state and federal laws related to the provision of special education instruction and related services and shall utilize appropriate SELPA forms.

Education for Change at Cox Elementary shall be solely responsible for its compliance with Section 504 and the ADA. All facilities of the Charter School shall be accessible for all students with disabilities in accordance with the ADA. The Education for Change at Cox Elementary facility shall not present physical barriers that would limit an eligible student's full participation in the educational and extracurricular programs offered by Education for Change at Cox Elementary.

***Section 504***

Education for Change at Cox Elementary recognizes its legal responsibility to ensure that no qualified person with a disability shall, on the basis of disability, be excluded from participation, be denied the benefits of, or otherwise be subjected to discrimination under any program of the Charter School. Any student who has an objectively identified disability which substantially limits a major life activity such as learning is eligible for accommodation and/or related services by the School under Section 504.Education for Change at Cox Elementary has written policies that outline the requirements for identifying and serving students with a 504 accommodation plan.

The Director of Site Services will work directly with the site principal who will serve as the 504 Coordinator.

The 504 team will be assembled by the principal and shall include the parent(s)/guardian(s), the student (as appropriate), and qualified persons knowledgeable about the student, the meaning of the evaluation data, placement options, and the legal requirements for least restrictive environment. The 504 team will review the student's existing records, including academic, social, and behavioral records, and is responsible for making a determination as to whether an evaluation for 504 services is appropriate. If the student has already been evaluated under the IDEIA but found ineligible for special education instruction or related services under the IDEIA, those evaluations may be used to help determine eligibility under Section 504. The student evaluation shall be carried out by the 504 team, who will evaluate the nature of the student's disability and the impact

upon the student's education. This evaluation will also include consideration of any behaviors that interfere with regular participation in the educational program and/or activities. The 504 team may also consider the following information in its evaluation:

- Tests and other evaluation materials that have been validated for the specific purpose for which they are used and are administered by trained personnel.
- Tests and other evaluation materials include those tailored to assess specific areas of educational need and not merely those which are designed to provide a single general intelligence quotient.
- Tests are selected and administered so as to ensure that when a test is administered to a student with impaired sensory, manual, or speaking skills, the test results accurately reflect the student's aptitude or achievement level or whatever factor the test purports to measure rather than reflecting the student's impaired sensory, manual, or speaking skills.

The final determination of whether the student will or will not be identified as a person with a disability is made by the 504 team in writing and noticed in writing to the parent(s) or guardian(s) of the student in their primary language along with the procedural safeguards available to them. If during the evaluation, the 504 team obtains information indicating possible eligibility of the student for special education per the IDEA, a referral for special education assessment will be made by the 504 team.

If the student is found by the 504 team to have a disability under Section 504, the 504 team shall be responsible for determining what, if any, accommodations or services are needed to ensure that the student receives the free and appropriate public education ("FAPE"). In developing the 504 Plan, the 504 team shall consider all relevant information used during the evaluation of the student, drawing upon a variety of sources, including, but not limited to, assessments conducted by the Education for Change at Cox Elementary professional staff.

The 504 Plan shall describe the Section 504 disability and any program accommodations, modifications, or services that may be necessary.

All 504 team participants, parents, guardians, teachers, and any other participants in the student's education, including substitutes and tutors, must have a copy of each student's 504 Plan. The 504 Coordinator will ensure that teachers include 504 Plans with lesson plans for short-term substitutes and that he/she review the 504 Plan with a long-term substitute. A copy of the 504 Plan shall be maintained in the student's file. Each student's 504 Plan will be reviewed at least once per year to determine the appropriateness of the Plan, needed modifications to the plan, and continued eligibility.

***Services for Students under the "IDEIA"***

The Charter School intends to provide special education instruction and related services in accordance with the IDEIA, Education Code requirements, and applicable policies and practices of the Special Education Local Plan Area ("SELPA") and the Memorandum of Understanding ("MOU") between the Charter School and the District. The Charter School shall remain, by default, a public school of the District for purposes of Special Education pursuant to Education Code Section 47641(b). However, the Charter School reserves the right, in the future, to make written verifiable assurances that the Charter School shall become an independent LEA and join a

SELPA pursuant to Education Code Section 47641(a) either on its own or with a grouping of charter school LEAs as a consortium.

As a public school of the District, solely for purposes of providing special education and related services under the IDEIA pursuant to Education Code Section 47641(b), in accordance with Education Code Section 47646 and 20 U.S.C. 1413, the Charter School seeks services from the District for special education students enrolled in the Charter School in the same manner as is provided to students in other District schools.

The Charter School will follow the District and SELPA policies and procedures, and shall use SELPA forms, in seeking out, identifying, and serving students who may qualify for special education programs and services and for responding to record requests and maintaining the confidentiality of pupil records. The Charter School will comply with District protocol as to the delineation of duties between the District central office and the local school site in providing special education instruction and related services to identified pupils. The Charter School will request an annual meeting between the Charter School and the District to review special education policies, procedures, protocols, and forms of the District and the SELPA and District protocol, to ensure that the Charter School and the District have an ongoing mutual understanding of District protocol, and to facilitate ongoing compliance.

As long as the Charter School functions as a public school of the District for purposes of providing special education and related services under the IDEIA pursuant to Education Code Section 47641(b), the Charter School shall comply with the Memorandum of Understanding ("MOU") with the District, which spells out in detail the responsibilities for provision of special education services and the manner in which special education funding will flow to the students of the Charter School and to the District. A summary of the relationship follows the language and intent of Education Code Section 47646 and 20 U.S.C. 1413 as follows:

- The District retains the special education funds for the students of the Charter School.
- The District provides services to the students of the Charter School in the same manner as other students of the District.
- The Charter School pays the District a pro-rata share of the overall District encroachment for special education.

*Assessment*

The Oakland Unified School District shall make the determination as to what assessments are necessary, including assessments for all referred students, annual assessments, and tri-annual assessments, in accordance with the District's general practice and procedure and applicable laws. Education for Change at Cox Elementary shall not conduct unilateral independent assessments.

*Individualized Education Plan ("IEP")*

Responsibility for arranging necessary IEP meetings shall be allocated in accordance with the District's general practice and procedure and applicable law. Education for Change at Cox Elementary shall be responsible for having the designated representative of Education for Change at Cox Elementary in attendance at the IEP meetings in addition to representatives who are knowledgeable about the regular education program at Education for Change at Cox Elementary.

Decisions regarding eligibility, goals/objectives, program, placement, and exit from special education shall be the decision of the IEP team. Team membership shall be in compliance with state and federal law and shall include the designated representative of Education for Change at Cox Elementary (or designee) and the designated representative of the District (or designee) unless otherwise required by law. Services and placements shall be provided to all eligible Education for Change at Cox Elementary students in accordance with the policies, procedures, and requirements of the District and of the Local Plan for Special Education.

To the extent that the agreed-upon IEP requires educational or related services to be delivered by staff other than Education for Change at Cox Elementary staff, the District shall provide and/or arrange for such services in the same manner that it would be legally obligated to provide to the students at its other Oakland Unified School District schools. District services shall include consultative services by District staff to Education for Change at Cox Elementary staff in the same manner that District staff consults with staff at other District schools.

*Funding*

As stated above, Education for Change at Cox Elementary has elected the status of any other public school in the District for the purposes of special education services and funding, and the District agrees to provide special education services for Education for Change at Cox Elementary consistent with the services it provides at its public schools. Consistent with this division of responsibility, Oakland Unified School District shall retain all state and federal special education funding allocated for Education for Change at Cox Elementary students through the SELPA. Education for Change at Cox Elementary will be responsible for a pro-rata share of the district-wide encroachment for special education.

*Discipline*

Education for Change at Cox Elementary shall follow the requirements of state and federal law in regard to the suspension or expulsion of special education students, including but not limited to the requirement that a manifestation determination be made prior to any change of placement.

## Plan for English Learners

Education for Change at Cox Elementary administers the home language survey upon a student's initial enrollment into the Charter School (on enrollment forms). All students who indicate that their home language is other than English are CELDT-tested within thirty days of initial enrollment and at least annually thereafter between July 1 and October 31 until reclassified as fluent English proficient.[1]

Education for Change at Cox Elementary notifies all parents of its responsibility for CELDT testing and of CELDT results within thirty days of receiving results from the publisher. The CELDT shall be used to fulfill the requirements under the No Child Left Behind Act for annual

[1] The thirty-day requirement applies only to students entering a California public school for the first time or students who have not yet been CELDT-tested. All others will be tested on the annual schedule according to the last date of testing.

English proficiency testing. The results of all testing will be reported and submitted to the District on the R-30 survey annually.

All parents or guardians of students classified as English Language Learners will be notified in writing. The school will translate materials as needed to ensure that parents of ELL students understand all communications and are involved in all processes related to the English Language Development of their child.

Education for Change at Cox Elementary has hired all CLAD, and/or BCLAD credentialed teachers who are certified to teach English Learners and who have the skills and expertise to accelerate the academic and linguistic development of English Learners ("ELs").

English Learners are supported through a combination of differentiated instruction, a supportive school culture, and additional academic support as needed.

The goal of the Education for Change at Cox Elementary EL plan is to utilize high quality instructional programs and services for English learners that allow them, as quickly as possible, to achieve at the same challenging grade level standards as native-English-speaking students. Cox will meet all requirements of federal and state law to provide equal access to the curriculum for English Language Learners. The school is dedicated to providing these students with an exceptional education, transitioning them into English proficiency as soon as possible. However, the school also recognizes the importance of valuing students' native languages, and will reinforce an appreciation for the cultures, customs, and languages of all its students through the school's core curriculum as it focuses on building lifelong learners and community engagement.

Students are not excluded from curricular and extracurricular activities based on an inability to speak and understand the language of instruction, and ELL students are not assigned to special education because of their lack of English proficiency. Parents whose English proficiency is limited will receive notices and information from the school in their native language to the extent possible in order to encourage participation in the school.

In its first years, Cox provided primary language classes in the primary grades. Cox has subsequently transitioned to providing all students with core instruction in English. As a part of a comprehensive needs assessment and effort to accelerate students' academic performance, it was determined that Cox could provide the most consistent high quality rigorous instruction in English.

EL students participate in departmentalized English Language Development instruction daily for a half-hour. Cox is currently using the Language for Learning, Language for Thinking, and Language for Writing curriculum by McGraw-Hill. Initially, Cox was using a variety of different curricula including Santillana and a Hampton Brown program.

Reclassification

Reclassification procedures utilize multiple criteria in determining whether to classify a pupil as proficient in English including, but not limited to, all of the following:

- Assessment of language proficiency using an objective assessment instrument including, but not limited to, the CELDT.

- Participation of the pupil's classroom teachers and any other certificated staff with direct responsibility for teaching or placement decisions of the pupil to evaluate the pupil's curriculum mastery.

- Parental opinion and consultation, achieved through notice to the parent(s) or guardian(s) of the language reclassification and placement including a description of the reclassification process and the parents'/guardians' opportunity to participate, and encouragement of the participation of the parent(s) or guardian(s) in the reclassification procedure including seeking their opinion and consultation during the reclassification process.

- Comparison of the pupil's performance in basic skills against an empirically established range of performance and basic skills based upon the performance of English-proficient pupils of the same age that demonstrate to others that the pupil is sufficiently proficient in English to participate effectively in a curriculum designed for pupils of the same age whose native language is English.

Below is EFC's reclassification form:

**Reclassification: Criteria for Determining English Proficiency**

Student Name: _____ Permanent ID Number: _____ Grade: _____

| | **Criteria** | **Signature and Date** |
|---|---|---|
| California English Language Development Test (CELDT) Scores | 1) Overall score of:<br>□ Early Advanced □Advanced<br><br>AND<br><br>2) Intermediate or higher scores in:<br><br>Listening/ Speaking<br>□Intermediate □ Early Advanced □ Advanced<br><br>Reading<br>□Intermediate □ Early Advanced □ Advanced<br><br>Writing<br>□Intermediate □ Early Advanced □ Advanced | |
| ***If the student has an overall score of Early Advanced or Advanced AND Intermediate or above in all three assessment areas: Listening/Speaking, Reading and Writing, then continue with the reclassification process.*** | | |
| California Standards Test (CST) for English Language Arts | Student score on the English Language Arts California Standards Test: _____<br><br>Is this above the basic cut point of 325?<br>□ yes □ no | |
| ***If the student's verified CST English Language Arts score is above the cut point, continue with the reclassification process.*** | | |
| Teacher Evaluation | Does this student receive grades of 3 and above in | |

| | | |
|---|---|---|
| | English Language Arts on the report card?<br>□ yes □ no<br><br>Is the student at benchmark in fluency and comprehension on the assessments?<br>□ yes □ no | |
| *If the student meets the teacher evaluation criteria, continue with the reclassification process.* | | |
| Parent Consultation | Date notice has been sent to parents to notify them of their right to participate in the reclassification process:<br>_____<br><br>Date met with parent : _____<br>Parent comment: | Parent Signature: |
| *The student has met all the criteria for reclassification* | | |
| Parent Notification of reclassification | Date notification sent to parent: _____ | |
| Monitoring | Year 1: _____ Grades in ELA are 3and above?<br>Trimester 1 □ yes □ no<br>Trimester 2 □ yes □ no<br>Trimester 3 □ yes □ no<br><br>Year 2 Grades in ELA are 3and above? □ yes □ no<br>Trimester 1 □ yes □ no<br>Trimester 2 □ yes □ no<br>Trimester 3 □ yes □ no | |

EFC's CAO and CEO monitor annual CELDT results and recommend students for reclassification if they score Early Advanced or Advanced with no subtest score below Intermediate and scored at the Basic Level or higher on the prior year's CST. Students in the fourth grade or above scoring at the Beginning or Early Intermediate level are assessed for consideration for the Language! intervention program. The school makes the final decision on whether to reclassify a student based on teacher and parent input (i.e. student is able to perform basic level work in the classroom). Parents are notified when a student is designated and the student's records are updated. Once reclassified, Education for Change at Cox Elementary monitors student progress to ensure they are mastering the CA standards.

## Plan for Students Who Are Academically Low Achieving

EFC's program, which emphasizes differentiated instruction, focuses on system-dependent and low-achieving students, who make up the vast majority of the school's enrollment. The elements intended to be most effective for these students are the high expectations of its coherent curriculum, the extended learning opportunities after school aligned to classroom curriculum, and a teacher corps that utilizes data more intensively and effectively to deliver differentiated instruction.

Education for Change at Cox Elementary uses a structured method of analyzing data that leads to specific action plans and goals. The following is an example of the analysis performed in English–Language Arts. A similar process is conducted in Mathematics (Please see appendix # 23). Analysis of writing prompts is another source of data that is used to develop instructional responses.

**Collaborative Inquiry Cycle: GRADE LEVEL DATA ANALYSIS**

School: _____ Grade Level: _____ Unit:
Participants: _____

**STEP 1: DATA ANALYSIS, TARGET GOAL, AND FOCUS AREA GOALS**
First review your own class data. Then share your data with your grade level.

Go back to your Data Analysis from the last CIC time and check your target goals. What was the outcome?

**FLUENCY OUTCOME: We □ met our goals □ did not meet our target goals**
**What is your hypothesis about why you met or did not meet your goals?**

_____
_____
_____
_____

**AREA OF IMPROVEMENT OUTCOME: We □ met our goals □ did not meet our target goals**
**What is your hypothesis about why you met or did not meet your goals?**

_____
_____
_____
_____

**After reviewing our grade level data, we believe that the data demonstrates that we are succeeding in…**

| Area of success | Evidence (e.g., ____ out of _____ students are at/ above benchmark, _____ % of students moved from intensive to strategic) | What is your hypothesis about why the data looks the way it does? |
|---|---|---|
| | | |

**FLUENCY ANALYSIS:**
Number of students at your grade level that are at benchmark or above: _____.

The number that are below benchmark: _____.

**Fluency Action Plan:**

| # of non-decoders | # of students who were non-decoders who moved up | # of low non-fluent readers | # of low-non-fluent readers who moved up | # medium non-fluent readers | # of medium non-fluent readers who moved up | # of fluent readers |
|---|---|---|---|---|---|---|
| **What is your hypothesis about why the data looks the way it does?** | | | | | | |

| Names of Non-Decoders | What has been done thus far to address their needs (fluency instruction and practice)? Resources: TE, Fluency Action Plan, Fluency Training, etc. | What are your next steps? |
|---|---|---|

| Names of Low Non-Fluent | What has been done thus far to address their needs (fluency instruction and practice)? Resources: TE, Fluency Action Plan, Fluency Training, etc. What are your next steps? |
|---|---|

**TARGET GOAL for FLUENCY:**
**By the next unit assessment, _____ more non-decoders will be _____as measured by the OCR Unit Assessments.**
**By the next unit assessment, _____more low non-fluent readers will be _____as measured by the OCR Unit Assessments.**
**By the next unit assessment, _____more medium non-fluent readers will be _____as measured by the OCR Unit Assessments.**

**AREA OF IMPROVEMENT: After reviewing our assessment data, we also see that we need to focus on improving instruction in the following areas.**

| Area in need of improvement | Evidence (e.g., ____ out of _____ students are below benchmark or intensive, _____% of students moved from proficient to strategic) | What is your hypothesis about why the data looks the way it does? |
|---|---|---|

**Select one of the areas of improvement from above.**
**In reviewing the item analysis, we see that the questions that students missed the most are:**

| Questions Missed | Standards assessed | Incorrect answer most students selected | What knowledge and/or skills was this question asking the student to have learned? What does this indicate students are misunderstanding/unclear about? |
|---|---|---|---|
| | | | |

**Possible TARGET GOAL for AREA of IMPROVEMENT:**
**By the next unit assessment, _____ students will _____move from intensive to strategic in _____.**
**By the next unit assessment, _____ students will _____move from strategic to benchmark in _____.**
**By the next unit assessment, _____ students will be at or above benchmark in _____.**

**Look ahead in the upcoming unit. When will this be taught again? Our instructional responses based on this analysis (to be developed during the Instructional Response PD) for these students will be:_____**

Professional development in how to analyze data and the instructional implications is a vital component of addressing the needs of low achieving students. Teacher leaders, administrators, and coaches attend trainings together and create an action plan of how to focus site-level professional development to support teachers in meeting the needs of students. The additional teacher professional development and collaboration time allows teachers the opportunity to analyze data, delve into the curriculum, and study the components of the curriculum that address the needs of low achieving students, learn from one another, and plan collaboratively to improve the instruction delivered in the classroom. Some examples include:

- Analyzing student data into specific groups such as non-decoder, low non-fluent, and mid-non-fluent and developing plans to accelerate their learning;
- Effectively using Workshop in both Saxon Math and Open Court Reading to differentiate instruction;
- Scaffolding instruction for students so all can have access to the core curriculum;
- Collaboratively cognitively planning lessons to maximize the engagement of all students, particularly intensive need students; and
- Engaging in text analysis and planning lessons to improve comprehension

*Before- and After-School Intervention Programs*
Intervention focuses on students below grade level who need support in fluency and reading comprehension as well as specific mathematics content. Students are chosen by CST data, benchmark data, and teacher recommendation. The benchmark assessment results of students receiving intervention services are monitored to determine student progress and when students are ready to exit the program. Cox is piloting two new intervention and student support strategies this year. The first is a reorganization of the after-school intervention schedule. The first hour will

focus on enrichment and the second hour will focus on academic intervention. The schedule has two advantages:

1. It increases the chances of recruiting EFC teachers and other credentialed teachers to work in the after-school intervention program. Because of EFC's commitment to strong professional learning communities, teachers are unavailable immediately after school. They are, however, available an hour later, and EFC will recruit them to support the most challenged students in an extended-day setting.

2. It leverages a new partnership with MOCHA (the Museum of Children's Art). Learning through the arts has important benefits for students, particularly in terms of higher order thinking skills. EFC is partnering with MOCHA to provide students in the intervention program at Cox with structured arts learning. Four artists are currently onsite working with students and providing training to EFC teachers on integrating arts learning into their instruction.

The after-school intervention is for students who are performing below basic (BB) or far below basic (FBB) in ELA or math or who are non-decoders. The FBB and BB students receive intervention in reading two days a week in ELA and two days a week in math. Students who are non-decoders receive decoding instruction five days a week until they become successful word decoders, proficient decoders, and successful word decoders. The materials currently in use include SCOE's Non-decoder Intervention Program, SRA Leveled Readers, OCR Intervention Guide, and Standards Plus Mathematics.

In addition to daily after-school interventions through the school year, some students who are severely underachieving may be invited to receive extra support for one week during the summer. EFC uses this time as professional development training for new teachers to work with the students and observe structured intervention lessons.

*Intensive Intervention*

Upper-grade students who are reading two or more years below grade level are assessed to determine appropriate placement in the Language! intervention program, which provides daily intensive reading intervention. Language! replaces the core reading instruction and is designed to accelerate students to reenter the core as quickly as possible. This is a comprehensive intervention program that targets the students' specific areas of need to ensure they are addressed as effectively and efficiently as possible. Language! is a state-approved intervention program for both struggling readers and English Language Learners and meets the standards of both the NRP, NCTE, and the IRA.

The Language! Program has six steps for addressing students' needs. It begins by addressing phonemic awareness and phonics to ensure students know the sound-spelling correspondences and the syllable patterns. In the second step, word recognition and spelling, the teacher explicitly teaches the most common spellings, which account for 85% of the words in the English language. The third step is vocabulary and morphology, which focuses on word meanings as well as multiple meaning words. Students learn to use roots (Latin and Greek), prefixes, and suffixes to understand the meanings of words; thereby building their ability to independently determine the

meaning of unfamiliar words. During the instruction of the fourth step, grammar and usage, the teacher teaches basic grammatical structures such as sentence structure, conventions and mechanics. Students then practice applying these skills. The fifth step is listening and reading comprehension where student integrate their knowledge from the previous four steps and apply them to reading text. The text varies depending on the student's assessed level. In the final step, students apply their knowledge from the first four steps and apply them to writing. Students begin by learning to write high quality sentences, then paragraphs and then essays. The teacher guides the students through the writing process.

Data drives the Language! program. From the initial placement assessments, which determine the program level, to the on-going assessments, the data guides the differentiation of instruction. For every Content Mastery and Summative test, the Language! program has a prescriptive teaching box, which tells teacher exactly the content students were struggling with and indicates the lessons/ materials to use to reinforce or re-teach the concept.

## Plan for Students Who Are Academically High Achieving

Education for Change at Cox Elementary believes that all children possess gifts and talents that are unique and precious. Unfortunately, due to being historically underserved, few students currently fall into state-defined high achievement categories at Cox Elementary Charter School. Nevertheless, the students who become high achievers over time in the Cox program benefit from all the same programmatic structures that low-achieving students do. The curriculum has multiple opportunities for the high-achieving students to expand their knowledge and skills through higher level inquiry and small group instruction. As student capabilities expand and the state content standards are met at an ever-increasing rate, the pace of the rigorous curriculum has been accelerated. Students who are reading at an advanced level use the Open Court Classics for additional theme related reading. EFC's instructional program supports Literature Circles / Reading Roundtable where students read and discuss theme-related text, including novels. Many students who are performing above grade level may also be provided extracurricular and high-engaging activities such as strategy games, design, and technology-supported activities.

## Schedule and Academic Calendar

Students will attend school Monday through Friday from 8:30 a.m. to 3:00 p.m. for grades 1–5 and 8:30 a.m. to 2:00 p.m. for kindergarteners. On Wednesdays, in accordance with standard OUSD practice, school will end at 1:30 p.m. (minimum day) for all students in order to provide teachers with dedicated professional development time each week.

***Sample Daily Schedule***

Cox students start the instructional day at 8:30 a.m. For the majority of the day, students are engaged in the standard curriculum areas of ELA (150-minute block for grades 1–5 and 100-minute block for K) and mathematics (90-minute block for grades 3–5 and 60-minute block for K–2). Daily ELD consists of a total of 30 minutes. In addition, based on student need, students are provided with lessons to frontload Open Court. Science, social studies, arts, music, technology, physical education, and health are infused within the academic week in a coordinated and

complementary fashion with the core ELA and math classes. Lunch is approximately 35 minutes each day.

3:00 p.m. – 4:00 p.m. (Teacher Professional Development / Collaboration Time)
This period, every day except Wednesdays, provides teachers with much-needed and desired time for professional development and collaboration with their colleagues within the school as well as with other EFC schools. Providing additional dedicated time each day that is fully compensated allows all teachers at each school the time to move instruction to a high quality level and truly build an environment and culture where high expectations for student achievement can be a reality.

3:10 p.m. – 5:10 p.m. (Extended Learning Opportunities)
As community engagement and whole-child development are key areas of focus for all EFC schools, the school looks to provide extended learning opportunities for its students and eventually for the wider community. Some activities that have been offered include:

For students:

- Small group intervention instruction
- Homework help sessions
- Enrichment classes (e.g. arts, design, sports, clubs)
  PlayWorks activities
  For the community (times may vary):
- School fairs (Back to School Night, Expo, University Night, Open House)
- Parent engagement classes (with topics such as assisting your child with homework, holding your child accountable at home and school, navigating a bilingual world, and computer literacy)

All of these programs are staffed by teachers wishing to participate (with additional compensation), community volunteers, community groups, and service providers.

***Nights and Weekends***
As with all student and community service organizations, the school occasionally holds school and/or staff functions in the evenings and on Saturdays. These functions have included parent-teacher conferences, IEP meetings, whole-school performances, school fairs, Data Nights, staff retreats, and other staff professional development sessions. These events/activities mainly are schedule-constrained (parent work schedules, professional development provider availability schedules). They are announced with sufficient advance notice and are kept to a minimum throughout the year.

***Staff Prep***
EFC provides weekly preparation time for all teachers.

***Class Size***
EFC will implement a 20-to-1 class size reduction **in** grades **K–3.** EFC's goal will be to implement upper-grade class reduction to have an average fourth and fifth grade class size of 28. The Chief Operating Officer works aggressively and strategically to maintain EFC's class size

limits. Cox Elementary reserves the right to fluctuate class sizes as allowed by budgetary legislation for CSR.

**Annual School Calendar**

Education for Change at Cox Elementary will follow applicable state law to assure that students enrolled in the school attend a school calendar offering a minimum of 175 days. Education for Change at Cox Elementary may set its calendar independently of the sponsoring district in terms of holidays, breaks, and the beginning and end of the school year.

Education for Change at Cox Elementary generally attempts to align its annual school calendar with the Oakland Unified School District's. However, it and all EFC schools will maintain flexibility for an earlier school year start and end date in order to provide more time off during the winter holiday break. Given the reality that a majority of the targeted students take extended breaks out of the country during this time, the school would like to maximize its instructional effectiveness by minimizing lost student attendance days through this alteration of the school schedule. The school enhances beginning of the year and professional development time for teachers/staff by adding up to 4 additional, fully compensated professional development days. A majority of these days are usually scheduled for the week prior to the start of school to provide teachers with compensated time to prepare their classrooms as well as engage in orientation and professional development sessions focused on implementing the EFC instructional program and building the EFC culture at the school.

Education for Change at Cox Elementary will offer the required instructional minutes as established in Education Code Section 47612.5(a).

## Parental Involvement

EFC operates under the premise that the teachers, parents/guardians, and students, by their own choice, must work together as partners to create the potential for a quality education. Parents are a vital part of this partnership, and accordingly, Education for Change at Cox Elementary works to encourage all parents, even those who traditionally have not engaged with the school community, to participate.

Grade-level parent meetings are held approximately nine times a year (once a month). At these meetings, parents/guardians are given opportunities to learn about school and grade-level events, grade level curriculum, results, data, as well as share their ideas and concerns. Parents receive training in working with their students at home.

Other opportunities for parent involvement include report card pickup, parent conferences that occur three times a year (and more often for students who are underperforming), newsletters, school events (such as the EXPO, Exposition of Learning, at which students' work and projects are shared), Parent Leadership Council, Parent Center activities, volunteer opportunities and Study Tours (field trips). Cox parents and guardians are also encouraged to take an active role in supporting all aspects of the school. Monthly Parent Leadership Council meetings give parents and opportunity to provide input about school activities, quality of the program and campus safety. Parents also voice their needs so that they can partner with the school for student success.

In an effort to provide greater consistency of participation and increased involvement in school governance, Cox Academy parents will elect a chairperson who will serve as a liaison to the EFC board, unless another elected representative is designated by parents. A list of mandated topics, which is already in use, (Please see appendix # 15), will be supplanted with topics of parent choice.

Education for Change at Cox Elementary is beginning to implement a Scholars Program for Cox families. The program is designed for the school and parents/guardians to work together to help students be more successful academically and socially. EFC has set a minimum target of 60 families to participate in the Scholars Program for the 2009–2010 school year at Cox.

Participation in the program is by contract. The principal, the parents/guardians, and the students commit to a set of promises that, if upheld, will contribute to better student learning. The promises focus on:

- Significant parent involvement
- Caring, demanding, skilled teachers
- Good work habits
- Extending curriculum to the home
- High expectations from adults
- Self-discipline
- Adults reading in the home

Core to the Scholars Program are trainings to help parents uphold their promises, especially around assisting their children at home. The trainings focus on supporting student learning at home in math, the sound spelling system, reading comprehension, and writing, along with word knowledge for upper-grade students. In addition, participants will complete regular progress reports and convene in meetings to monitor program effectiveness and provide problem solving opportunities for families.

Education for Change at Cox Elementary Scholars Program Promises:

I, _____, Principal of Education for Change at Cox Elementary, commit to ensuring that Education for Change at Cox Elementary provides:
• High quality curriculum and instruction
• Ongoing training for parents
• An environment that supports academic focus and achievement
• Ongoing communication about student progress
• Recognition activities for students and parents who keep their commitment

I, _____, parent/guardian of a student enrolling in the Education for Change at Cox Elementary Scholars Program, commit to:
• Ensuring my child attends school every day and is on time
• Ensuring my child wears an EFC uniform every day at school
• Designating a space for the child to do his/her homework each night
• Reviewing or designating another responsible person to review my child's homework nightly

• Being aware of my child's reading fluency rate and goal as well as progress
• Being actively involved in designated activities for the Education for Change at Cox Elementary Scholars Program
• Being aware of my child's general strengths and weakness and how I can help
• Meeting my child's teacher and communicating my support
• Reviewing report cards and progress reports and attending parent-teacher conferences
• Communicating with my child's teacher and any other staff member when I have a question or concern or I can offer any support or help

I, _____, student enrolling in Education for Change at Cox Elementary Scholars Program, commit to:
• Being aware of and consistently following school rules
• Attending school every day and being on time
• Wearing the EFC uniform every day at school
• Consistently focusing and participating in class
• Completing homework and other assignments with appropriate quality and care
• Being aware of my reading fluency rate and target goal as well as focusing on continuous improvement
• Learning all the sounds and spellings for my grade level and using them correctly in my work with a high degree of consistency
• Learning appropriate math facts for my grade level
• Beginning and maintaining my preparation to go to college

## Community Involvement

Building strong links with the local community is critically important to the school's success. The school and EFC partner with individuals and organizations in the community that are dedicated to helping students obtain their academic goals and providing total child support and development. Current partners include:
East Bay Agency for Children
Museum of Children's Art (MOCHA)
Alameda County Office of Education
California State University East Bay
PlayWorks (Formerly Sports4Kids)
The Creekside Church
San Lorenzo Unified School District for food service

The school and EFC will continue to reach out to a wide range of organizations such as these throughout the life of the school.

## Professional Development

As a cornerstone for all EFC schools, staff professional development is developed and conducted with the intent of creating collaborative, supportive, continuous learning environments at each school. Just as we encourage our students to achieve through high expectations and by providing

the best educational services possible, we look similarly at building this same culture of achievement, support, and quality for our teachers.

The principal sets the tone and develops the conditions under which staff members become the keepers of the school's culture and values. As a result, staff development supports the school's mission and basic values by fostering a positive campus culture, sharing the best instructional practices, and encouraging individual teacher growth. Beginning in staff orientation before the start of the school year, the principal and members of EFC's academic support team ensure that teachers fully understand and support EFC's mission, goals, and basic values, emphasizing a rigorous, standards-based instructional program. This orientation involves specific activities designed to align the staff and foster teamwork and the building of a professional learning community.

During the school year, staff development continues through professional development days, professional development sessions, whole staff meetings, and department and grade-level team meetings. Professional development typically takes place during the Wednesday minimum day afternoons from 2:30 p.m. until 4:00 p.m.

The weekly schedule generally follows the following model:

- Mondays – full faculty meeting (once or twice a month)
- Tuesdays –grade-level team meetings (focused on Open Court or Math)
- Wednesdays – professional development trainings
- Thursday = additional grade-level meetings (as needed to support Math PD)

Fridays = depending on need, coach meeting
The School Site Instructional Leadership Team works with EFC's Instructional Team to determine session content based on identified school site needs. Some areas of training that have occurred in the last year are:

| **Date** | **Content** | |
|---|---|---|
| | **New or New to Grade Level** | **Veteran** |
| September 10th | Routines<br>1st /2nd grade or 1st/ 3rd - Blending, Decodable,<br>4th, 5th - Word Knowledge, show how to drop back to blending, how to teach decodable to small group | Student-friendly rubric |
| September 17 | Routines<br>1st /2nd grade or 1st/ 3rd - Workbook, Dictation, then 1st practices while teach 2nd and 3rd Word Knowledge<br>4th, 5th - Word Knowledge review | Student-friendly rubric and instructional response |

| Date | Content | |
|---|---|---|
| September 24th | MATH | |
| October 1 | Routines<br>Red<br>1st - Building Background, Preview and Prepare, Selection Vocabulary, Print and Book Awareness<br>2nd -5th - Building Background, CPW, Selection Vocabulary, Strategy Instruction, Discussing Strategy Use | Anchor papers (score, explanation, instructional response) |
| October 8th | Routines<br>1st - Strategies and Skills, Discussing the Selection<br>2nd–5th - Handing Off, Skill Instruction, Checking Comprehension, Theme Connections | Anchor papers |
| *October 10th* | Student-friendly rubric and on demand writing<br>Mini lesson model<br>Student engagement in Writing<br>Writing Pacing Planning<br>OARS training | |
| October 15th | MATH | |
| October 22nd | Calibration training | |
| October 29th | Data Analysis: recalibration and analyzing student work (CIC) | |
| November 5 | Analysis of student work and instructional response (CIC) | |
| November 12th | Workshop Development (CIC) | |
| November 19th | Focused PD (CIC) – MATH- Cox | |
| December 3rd | Focused PD (CIC)- Cox MATH- | |
| December 10th | Observation Feedback and Instructional Next Steps (CIC) | |
| December 17th | MATH | |
| January 14th | Grade Level Agreement Observation Feedback and Next Steps | |
| January 21 | Data Analysis: Benchmark Scores(CIC) | |
| January 26th | All day PD- MATH | |
| January 28th | MATH | |
| February 4th | Data Analysis: Writing (CIC) | |
| February 11 | Instructional Response (CIC) | |
| February 18th | Focused PD (CIC)- Cox<br>SGLM- | |
| February 25th | MATH | |
| March 4th | Focused PD (CIC)-<br>SGLM- Cox | |
| March 11th | Observation Feedback (CIC) - Cox | |
| March 16 | PD Day | |
| March 18th | MATH- Cox | |

| Date | Content |
|---|---|
| March 25th | Data Analysis: Benchmark Scores (CIC) |
| April 1 | Data Analysis: Writing (CIC) |
| April 15th | MATH: Lesson Enhancements/ key CST |
| April 22nd | Text Analysis |
| April 29 | Text Analysis |
| May 6th | K-3 - Text Analysis<br>4/5 - Math Investigations |
| May 13th | Text Analysis |
| May 20th | Text Analysis |
| May 27 | MATH: What are the big ideas? Cross-grade articulation. What do kids need to know coming into your grade level? |
| June 3rd | Cross-Grade Articulation: Open Court |
| June 10 | Pacing Guide Feedback |

In math, EFC is also attempting to address a common problem in elementary education: the relatively low level of familiarity and confidence that teachers have with math content. Addressing this requires a multipronged approach undertaken in partnership with the Mathematics Development Center at the Alameda County Office of Education. Through this partnership, EFC teachers have access to:

- One week of summer professional development offered by ACCLAIM (The Alameda County Collaborative for Learning and Instruction in Mathematics). K–3 teachers focus on primary mathematics, while grade 4–5 teachers focus on the transition to algebra. EFC subsidizes the costs of teachers' participation.
- One week of training to familiarize teachers with Saxon Math and how it relates to the California Mathematics Framework. Teachers are given the option to purchase units.
- Monthly professional development and twice-yearly full-day professional development taught by ACOE coordinators and EFC math leaders. Boosting teachers' content knowledge is the focus of all of these sessions, and teachers are given the opportunity to practice the skills being learned in order to develop competency in their delivery of the subject matter.
- Coaching support
- Saturday ACCLAIM support sessions designed to improve content knowledge and learn best practices.

Starting in 2009–2010, EFC invested in a significant additional strategy to boost teachers' content knowledge in math. A CSU East Bay professor, who leads ACOE's Mathematics Development Center, offers two college mathematics classes on site at EFC for EFC teachers. In the fall, the

course is focused on number sense; in the spring the course will focus on geometry. These are critical strands of elementary math learning and are identified areas of growth for EFC teachers. Importantly, EFC and ACOE have combined resources to fully cover the tuition costs for all teachers. Units are available at a cost to the teachers.

In addition to the formally planned professional development trainings, EFC has committed to supporting teachers and improving teaching through coaching.

EFC has the following coaching resources:

Literacy

- 2 coaches on staff dedicated to Education for Change at Cox Elementary
- 2 coaches on staff dedicated to World Academy and Achieve Academy
- 1 additional roving coach to strategically support identified priorities
- A coach coordinator to support and monitor the coaches

Mathematics

- One mathematics coordinator on staff
- A fulltime math coach from the Alameda County Office of Education (ACOE)
- Contracted support for the math program from ACOE and CSU East Bay

EFC's Chief Academic Officer (CAO) oversees the organization and delivery of coaching support.

In literacy, the coaches begin the school year focusing their support on new teachers and teachers new to the curriculum. The coaches work daily with teachers for extended periods (typically 7 to 9 weeks), co-teaching with them, diagnosing students' reading skills and providing ongoing feedback to classroom teachers on their instructional practice. The goal, simply put, is to transform practice in order to speed the pace of improved outcomes for students. Each unit has intense coaching addressing the greatest needs, identified through the analysis of student data.

In addition to the more formalized professional development described above, EFC schools will also be expected to leverage the extended day for teachers (3:00–4:00 p.m.) and other available time throughout the day (prep times) as opportunities for informal collaboration among and across grade levels.

Teachers are encouraged to observe one another and other excellent teachers in the community, and they receive regular feedback on their performance, goals, and growth. Teachers are expected to consistently exchange best practices with each other and teachers at other EFC schools. Professional development involves not only structured whole-staff and small-group practices, but also individualized support and coaching to best serve each teacher's needs. Every moment of professional development is maximized and aligned with the school's and EFC's goals.

The goal for EFC's focus on professional development is to create think tanks and educational laboratories for ideas, strategies, best practices, and success at each school site. Leveraging the knowledge base and creativity of motivated and dedicated staff across multiple schools will

eventually provide Cox and the other EFC schools with a vast repertoire of tools to utilize in their work toward providing an excellent education for all its students. EFC firmly believes that reinventing the wheel time and time again is not in the best interests of teachers and their students, so it continues to provide the support and assistance to help capture the most effective practices at each school, organize them into instructional procedures and scaffolds, and disseminate them to all of EFC.

# MEASURABLE STUDENT OUTCOMES

Governing Law: The measurable pupil outcomes identified for use by the Charter School. "Pupil outcomes," for purpose of this part, means the extent to which all pupils of the school demonstrate that they have attained the skills, knowledge, and attitudes specified as goals in the school's educational program. —California Education Code Section 47605(b)(5)(B)

EFC is committed to providing all of its students with an excellent, high-quality education. In order to achieve this goal, high student achievement as measured by national, state, local, and EFC measures must be achieved. Goals for student and school outcomes are continually refined and developed to reflect the changing needs of the school and EFC and are reset each year by the Instructional Leadership Team and EFC Home Office staff.

## ***Student/School Outcomes***

The school pursues the following student outcomes:

1. Students will exceed the average performance levels of students in schools with similar demographics in the District in English–Language Arts and Mathematics as measured school wide by the CST each year during the term of the charter.

2. Education for Change at Cox Elementary will reduce the percent of students who are performing Below Basic and Far Below Basic on the STAR assessments by 15% a year on average over five years for all assessed students.

3. Education for Change at Cox Elementary will increase the number of students, school wide, who are performing at proficient or advanced level on the STAR assessment by 13% a year on average over five years.

4. Education for Change at Cox Elementary will increase the number of students who achieve proficiency in Language Arts and Math after each unit by 10% as measured by the Reading Lions assessment (administered every 6-8 weeks) and EFC math assessments administered 3 times per year).

5. Education for Change at Cox Elementary will demonstrate continual student improvement on the CST by insuring that 25% of all assessed students move to the next CST band (FBB to BB, BB to B, etc.).

6. All English Language Learners will show a minimum of one year's growth measured by CELDT for each year of instruction.

7. The School will meet the API growth target in at least two of the last three years of the charter term.

8. The School will meet or exceed Adequate Yearly Progress goals by the end of the term of the charter.

9. At least 80% of students will be able to write and speak with clarity, accuracy, and precision as measured by scoring at least 3 on the SRA listening and speaking rubric and the SCOE writing rubric by the end of each school year. (Please see appendix # 21.a-c).

10. At least 80% of students will demonstrate the ability to think critically and problem solver as measured by scoring at least 3 on the inquiry rubric by the end of each school year. (Please see appendix # 21.e).

11. At least 90% of students will demonstrate EFC's principles of preparedness and productivity by completing daily homework as evidenced by report card data to parents at least three times a year.(Please see appendix # 14).

12. Student attendance will average at least 95% annually.

13. 95% of parents will grade the school either an A or a B as reported on the annual parent survey. (Please see appendix # 18).

14. At least 90% of the parents will report that they agree or strongly agree that Cox is a safe school environment on the annual parent survey.(Please see appendix # 18).

Through the effective support of the social and emotional development of our students, including the use of the Caring School Community Program and other curricular integration, the school will also continue to ensure that students understand and follow the critical attributes listed below:

**The 6 Ps of EFC**

1. Be Productive
2. Be Proud
3. Be Prepared
4. Be Prompt
5. Be Polite
6. Be Positive

* Renewal Criteria

**Pursuant to paragraph 1 of subdivision (b) [of Education Code § 47607], Cox shall have met at least *one* of the following criteria prior to receiving a charter renewal:**

(1) Attained its Academic Performance Index (API) growth target in the prior year or in two of the last three years, or in the aggregate for the prior three years.

(2) Ranked in deciles 4 to 10, inclusive, on the API in the prior year or in two of the last three years.

(3) Ranked in deciles 4 to 10, inclusive, on the API for a demographically comparable school in the prior year or in two of the last three years.

## Methods of Assessment

Governing Law: The method by which pupil progress in meeting those pupil outcomes is measured. —California Education Code Section 47605(b)(5)(C)

The assessment plan for Education for Change at Cox Elementary is designed to be a tool for external accountability as well as to improve instruction and student achievement. To best assure that the school is measuring what Cox expects students to learn, assignments are aligned with the school's pupil outcomes and curriculum. Assessments are used to meet the following objectives:

1) To help teachers respond instructionally according to student needs;
2) To give parents and students meaningful, useful feedback on student progress;
3) To compare the school's progress to that of all schools, including those with similar student demographics;
4) To monitor the school's progress in meeting its missions, and to revise its activities accordingly.

*English Language Arts Assessment:*
Using the Reading Lions Assessments for the Open Court Assessments program, students are assessed every six to eight weeks.

"Frequent assessment is the key to planning instruction that is appropriate to students' needs and to determining whether students are meeting or exceeding standards. ... Assessment should help teachers learn what students know and how well they know it. Frequent assessment should be included to help teachers determine whether students are learning and retaining what has been taught. Because assessment measures what students have been taught, the tasks in the assessment should parallel those in the instructional materials." (*Reading / Language Arts Framework for California Public Schools,* p. 256)

The Reading Lions Open Court reading assessments are designed to help classroom teachers and grade-level teams determine how effective their delivery of instruction is in meeting expected student learning goals in relation to concepts and skills taught in the program's theme/unit. They provide teachers with data related to the academic progress of individual students as well as an entire class. This information is then used to guide and plan instruction for the next theme/unit. Reading Lions Open Court benchmark assessments are also used to place students in before and after school intervention programs.

The areas assessed on the benchmark assessments in each grade level include:

Kindergarten: uppercase and lowercase letter recognition, high frequency words, oral blending, segmentation, rhyming, oral blending, phonemes, consonant and vowel sounds, cvc words

1st grade - Word Reading, Spelling, Writing, Fluency, Reading Comprehension

2nd–5th grade - Fluency, Reading Comprehension, Vocabulary, Spelling, Checking Skills (grammar), Writing

*Math Assessment:*
Saxon Math is a core math program that includes hands-on activities and problem solving tasks for all elementary grade levels. The version that Cox is using includes additional support for ELL students, professional development tools, and new question types. It also adds a new feature called Benchmark Assessment Generator designed to "help educators set benchmarks and track standards." Cox student take math tests biweekly. Teachers use the informal data as well as Saxon assessment results to determine level of proficiency and to inform ongoing instruction. Math assessments are also used to place student in before- and after-school intervention programs. In the last few years, teachers have also developed their own Trimester Tests with the assistance of ACOE. These Trimester Tests are critical tools in tracking the conceptual development of our students. The data are used to analyze both students' strengths and weaknesses and to adjust instruction accordingly.

Education for Change at Cox Elementary also has a site literacy team that meets weekly to discuss an action plan for reading and language arts. The team reviews the reading assessment, analyzes what the data show about instruction and learning, and develops an action plan based on that analysis. A parallel structure exists to support our math program.

In addition to the weekly meetings and grade-level meetings, Cox holds a data summit four times a year to review assessment results and to plan for the for upcoming school year.

EFC measures the impact and success of its academic programs utilizing all the aforementioned forms of evaluation and assessment. Cox is committed to conducting some form of assessment on an annual, quarterly, weekly, and daily basis in all core curricular areas. The proactive nature of these assessments serves as an opportunity for teachers and administrators to critique their program, modify instructional approaches, and establish new goals and expectations to better serve the student population.

EFC also administers all state and national tests required for grades K–5. Whenever appropriate, the California English Language Development Test will also be administered. As Education for Change at Cox Elementary does not test (e.g., STAR) with the District, Education for Change at Cox Elementary hereby grants authority to the State of California to provide a copy of all test results directly to the District as well as the charter school.

Test results for the prior year, if not provided directly to the District by the State, will be provided by the charter school to the District no later than September 1 of each year.

EFC fosters a climate of continuous improvement, establishing improvement goals through regular analysis of student data, for each student in the core classes of reading and mathematics, based on a review of the California Standards Tests as well as the school's own assessments. The ongoing goal of Cox is to improve performance on the state-mandated standardized tests each year until all students are proficient or advanced proficient in math and English–language arts.

The student and school outcome and performance goals are assessed as indicated in the following tables:

**Table: Student Academic & School Outcome Goals with Corresponding Assessment**

| Student Outcome Goals—Academic | Assessment Used | Performance Standards |
|---|---|---|
| Students will demonstrate proficiency in language arts and mathematics. | -Annual California Standards Test | 1. Students will exceed the average performance levels of students in schools with similar demographics in the District in English–Language Arts and Mathematics as measured by the CST.<br>2. Education for Change at Cox Elementary will increase the number of students who are performing proficient or advanced on the STAR assessment by 13% a year on average over five years<br>3. 25% of all assessed students will advance to the next CST band each year. |
| Education for Change at Cox Elementary will significantly reduce the number of students who score below proficient in language arts and mathematics. | -Annual California Standards Test | Education for Change at Cox Elementary will reduce the percent of students who are performing Below Basic and Far Below Basic on the STAR assessments by 15% a year on average over five years |
| Education for Change at Cox Elementary will increase the English Language proficiency of English Learners | CELDT | Each English learner at Education for Change at Cox Elementary will show a minimum growth of one CELDT level each year. |
| Education for Change at Cox Elementary will increase the number of students who achieve proficiency in language arts and mathematics | -Open Court Reading and EFC Math benchmark assessments | Education for Change at Cox Elementary will increase the number of students who achieve proficiency after each unit by 10%. |
| Education for Change at Cox Elementary will meet the API requirements for renewal. | STAR assessments | Education for Change at Cox Elementary will meet the API growth target in at least two of the last three years of the charter term. |

| Student Outcome Goals—Academic | Assessment Used | Performance Standards |
|---|---|---|
| Education for Change at Cox Elementary will meet or exceed Adequate Yearly Progress goals. | STAR assessments | By the end of the term, Education for Change at Cox Elementary will make its AYP goal. |
| Students will be effective and confident communicators, able to write and speak with clarity, accuracy, and precision. | Open Court writing assessments, informal classroom monitoring, and public speaking | 80% of students will score at least 3 on the four point SRA listening and speaking rubrics and SCOE writing rubric. |
| Students will be critical thinkers and problem solvers | SRA Inquiry Rubric | 80% of students will score at least 3 on the four point SRA Inquiry rubric |
| Maintain high student attendance rate. | Average Daily Attendance reports | The annual rate of ADA will be 95% or more. |
| Maintain high parental satisfaction rate. | EFC-created parent survey | 95% of parents will grade the school either an A or a B as reported on the annual parent surveys. |
| Maintain a safe environment for students and parents. | EFC-created parent surveys | At least 90% of the parents will report that they agree or strongly agree that Cox is a safe school environment as reported on the annual parent surveys. |

**Table: Critical Attributes for Student Success**

| Student Outcome Goals—Critical Attributes | Assessment used | Performance Standards |
|---|---|---|
| Students will demonstrate conduct aligned to EFC's 6 principles (The 6P's) | Indicators for Trimester Report Card | Three times each year, 80% of students will be rated as consistently following the 6P's rubric. |

Assessment of student achievement involves a full range of measures to ensure the most comprehensive picture of student progress. Quantitative data from standardized tests and results of performance-based assessment tools form the foundation of the school's comprehensive approach to measuring student performance.

***Use and Reporting of Data***

As mentioned in prior sections of this petition, data is primary driver for achievement in EFC schools.

Students take the Open Court benchmark assessments every 6 to 8 weeks. Teachers analyze these curriculum-based assessments and develop instructional plans based on the results. In addition to the formal assessments, teachers also informally assess and document student progress in all the content areas including ELD, Open Court, Math, Art, Science, and Social Studies through portfolios, monitoring logs, and other methods outlined below.

Cox Elementary not only collects and uses formal data (assessments) to inform instruction, but teachers are also trained to use informal data. Informal data used at Cox is data that teachers collect, but that is not reported publicly in a collective manner.

- Pre-assessments
- Monitoring logs
- Student responses, written and oral
- Teacher observation of student discussions, think-pair share, participation in instruction (blending, word knowledge, dictation, reading, during the writing process)
- Student work
- End of Selection Assessments, quizzes, quick check-ins
- Contributions to the Concept/ Question Board
- Writing conferences

Teachers use this data to inform instruction in the following ways:

- Workshop
  - Small-group instruction
  - Pre-teaching/frontloading skill before the lesson
  - Pre-reading
- During instruction
  - Targeting particular students for participation to practice skill.
  - Listening to target student responses to ensure correct usage.
  - Responding immediately to correct responses so that there is no confusion by other students.

Informal data can be found throughout the classroom:

- Student oral responses
- Written responses
- Reading fluency in informal situations
- Word reading
- During highly structured practice
- During guided practice
- Student participation patterns

EFC communicates regularly with parents. Teachers create progress reports weekly for students who are struggling or for whom parents request updates. These progress reports may be academic in nature or they may address behavioral issues.

*Report Cards*

Student Report cards create a succinct written record of student performance by compiling data from multiple assessments both formal and informal. Report cards are one of several ways to keep parents in the communication loop about student performance and ensure that data collection is regular and consistent. Report cards compile narratives, anecdotal records, attendance data, and information about student participation in class and school life. Results of standardized tests are mailed separately as well as included in the student grade report with explanations designed to help students and parents interpret their relationship to other assessments.

Education for Change at Cox Elementary is using the standard based report card that is aligned with the California State Standards. For each academic section (Reading / Language Arts, Math,

Cross-Curricular Integration), students are scored on a 1–5 scale, which mirrors the CST scores. ELD also uses the 1–5 scale, but the scores mirror the CELDT scores. The guidelines for Language Arts and Math indicate the Proficient Level. Proficient is considered at grade level. To receive a Proficient (4), the expectation would be that the student would have mastered all the standards indicated in the guidelines for that marking term. Each component or standard in Language Arts and Math should receive one of the following marks for their Grade Level Performance:

**Academic Grades**

1 = Far Below Basic
2 = Below Basic
3 = Basic
4 = Proficient
5= Advanced

**ELD Grades**

1 = Beginning
2 = Early Intermediate
3 = Intermediate
4 = Early Advanced
5= Advanced

Students will receive a report card 3 times a year. At the end of the first and second trimester, teachers will arrange a conference to discuss the report card with every parent/guardian. End-of-the-year conferences are prioritized for parents/guardians of students not making progress, low-achieving students, and those being retained. Other parents/guardians are encouraged to attend teacher conferences at the end of the year as well.

Ongoing communication between teachers, parents, and students is an essential component of Cox. In addition to progress reports, report cards, and assessment reports, newsletters are distributed monthly and grade-level meetings occur monthly. Parents can conference with teachers on an informal basis weekly or monthly, and on a formal basis three times per year, to discuss students' progress reports and proficiency levels. Back to School Nights and Open House also take place each year.

## ***Parent School wide Data***

Each fall and spring EFC distributes a parent satisfaction survey to all parents and legal guardians of students. It is the primary formal means of collecting information on the effectiveness of school operations, school outreach, and information dissemination, while also including parent perspectives on the quality of the EFC education.

EFC is accountable to multiple constituencies: students and their families, its Board of Directors, OUSD, and ultimately the California State Department of Education. Accountability to each of these constituencies includes both fiscal and academic performance. Throughout each school year, staff and the Board of Directors analyze collected student data including test scores, daily attendance records, parent surveys, and staff surveys; evaluate identified strengths and

weaknesses; and chart a course for school wide improvement and growth for the upcoming year. Additionally, the school's fiscal health is examined.

Education for Change at Cox Elementary maintains sufficient staff and systems, including technology, required to ensure timely reporting necessary to comply with the law and to meet all reasonable inquires from District and other authorized reporting agencies.

The Charter School and District will jointly develop a visitation process to enable the district to gather information needed to validate the school's performance and compliance with the terms of this charter. However, the Charter School agrees to and submits to the right of the District to make random visits and inspections in order to carry out its statutorily required oversight [Education Code Section 47604.3: the Charter School shall promptly respond to all reasonable inquiries including, but not limited to inquiries regarding its financial records from the District, the County Office of Education, and the State Superintendent of Public Instruction].

## Governance Structure

Governing Law: The governance structure of the school, including, but not limited to, the process to be followed by the school to ensure parental involvement. —California Education Code Section 47605(b)(5)(D)

***Corporate Legal Structure***

Education for Change, Inc., is a California nonprofit 501(c)(3) corporation incorporated in 2005 which operates Cox Elementary and **two** other charter schools, each separately chartered by the Oakland Unified School District. Each of the current Education for Change (EFC) schools is considered a division of EFC with its own P&L and operating budget. The charter applicant and holder for all Education for Change schools is the Board of Directors of Education for Change. The Oakland Unified School District is the chartering authority for EFC schools. Each EFC school maintains a separate budget and undergoes its own financial audit each year. EFC also creates combined financial statements annually.

Education for Change at Cox Elementary, in accordance with Education Code Section 47604.3, shall promptly respond to all reasonable inquiries, including but not limited to inquiries regarding financial records, from the District and shall consult with the District regarding any such inquiries. Education for Change at Cox Elementary acknowledges that it is subject to audit by OUSD and that if OUSD seeks an audit of Education for Change at Cox Elementary, OUSD shall assume all costs of such audit. This obligation for the District to pay for an audit applies only if the audit is specifically requested by the District and is not otherwise required to be completed by Education for Change at Cox Elementary by law or charter provisions.

The Charter School will operate autonomously from the District, with the exception of the supervisory oversight as required by statute and other contracted services as negotiated between the District and the School. Pursuant to California Education Code Section 47604(c), the District shall not be liable for the debts and obligations of the Charter School, operated by a California nonprofit benefit corporation or for claims arising from the performance of acts, errors, or

omissions by the charter school as long as the District has complied with all oversight responsibilities required by law.

Attached, as Appendix # 2, please find a copy of the Articles of Incorporation, and Corporate Bylaws.

Members of Education for Change at Cox Academy's governing board, any administrators, managers, or employees, and any other committees of the School shall at all times comply with federal and state laws, nonprofit integrity standards, and OUSD's Charter School policies and regulations regarding ethics and conflicts of interest so long as such policies and regulations are not in conflict with any existing applicable statutes or regulations applicable to charter schools.

Education for Change at Cox Elementary and/or its nonprofit corporation will be solely responsible for the debts and obligations of the charter school.

**Education for Change will:**

- Collaborate with the Oakland Unified School District (OUSD).
- Be operated as an independent 501(c)(3) tax-exempt California nonprofit public benefit corporation.
- Be governed by its Board of Directors, as defined by the California Corporations Code.
- Operate in accordance with all applicable federal, state, and local laws, the Articles of Incorporation, and Bylaws of the nonprofit corporation, which will be maintained to align with the charter.
- Operate public schools and not charge tuition.
- Encourage ethnic diversity in its programs, policies, and practices.
- Not discriminate in any programs, policies and practices based upon race, ethnicity, religion, gender, sexual orientation, or disability or any other characteristic described in Education Code Section 220.
- Be nonsectarian in its programs, admission policies, employment practices, and all other operations.

***Board of Directors***

The EFC Board of Directors will consist of at least 5 but not more than 11 voting members. EFC recruits qualified and appropriate candidates for the board from education, nonprofit, community, business, and legal organizations so that the current board is diverse in skill sets, perspectives, and backgrounds and can fully and responsibly govern the organization and schools while maintaining a unifying and passionate commitment to the vision and mission of EFC. The Board has appointed a President, a Treasurer/Audit Committee, and a Secretary.

The Oakland Board of Education and Unified School District shall be responsible for implementing the Charter Schools Act of 1992 and any other applicable laws in a good faith manner, and for cooperatively pursuing any necessary waivers or approvals required to implement the charter or seek appropriate funding. OUSD will not be liable for the debts or obligations of the

charter school so long as it complies with its supervision and oversight responsibilities contained in the Charter Schools Act of 1992 (see Education Code Section 47604 and 47604.32).

When necessary and applicable, OUSD is responsible for providing facilities under Proposition 39 and its implementing regulations.

The Board may include an executive committee and other special purpose committees as deemed necessary. The EFC Board has met regularly since its inception with the President of the Board presiding over the meetings. The EFC Board will continue to meet regularly. EFC will comply with the Brown Act.

EFC maintains in effect general liability and board errors and omissions insurance policies.

Cox Academy complies with the OUSD policy related to charter schools to the extent it aligns with and does not exceed the law applicable to charter schools, as it may be changed from time to time as long as the charter school has been given written notice of the policy change.

***Recruitment, Selection, and Development of Education for Change Board Members***

New board members are recruited and selected based on the provisions of EFC's bylaws. The CEO of Education for Change works closely with the Board of Directors to ensure that they are in full alignment with the organization's mission, culture, and goals. The qualifications sought in candidates interested in serving on the Board include but not be limited to:

- Dedication to furthering the vision and mission of EFC;
- Willingness to volunteer for one or more board committees and the ability to contribute appropriate time and energy necessary to follow through on assigned tasks;
- Ability to work within a team structure;
- Expectation that all children can and will realize high academic achievement; and
- Specific knowledge, experience, and/or interest in at least one element of governance for EFC.

***Current Board Members***

**Desten Broach**

Desten Broach, a founding board member, is a Bay Area software marketing professional. . He has held positions with ownership and management responsibility for numerous software products at Sun Microsystems, America Online, Netscape Communications, and Intuit, Inc. As an aide to U.S. Senator David Pryor, Mr. Broach focused on education as well as other issues. He graduated magna cum laude from Duke University with a B.A. in economics and earned an MBA from Stanford University's Graduate School of Business.

**Hae-Sin Thomas**

Hae-Sin Kim Thomas is the cofounder and current CEO of urban ED solutions, a new nonprofit education consulting organization committed to improving academic outcomes for children in historically underserved urban centers across the country. The focus of urban ED solutions is to

partner with leaders of schools and school districts to turn around schools that are either chronically failing or struggling to maintain gains. Ms. Thomas has more than 15 years of K–12 public education experience. Her work most recently has been in the school turnaround space, working with school districts and charter management organizations to turn around our city's lowest-performing schools.

Before urban ED solutions, Ms. Thomas was an employee of the Oakland Unified School District for 15 years – as a teacher, principal, school developer, and executive officer. The last three years, she led a team charged with designing and leading two key foundational tenets of Oakland Unified School District's nationally recognized reform effort Expect Success! creating quality school options for families in every neighborhood and ensuring smaller, more personalized communities of learning for all children. She was responsible for facilitating the design and opening of 22 new schools, replacing 18 chronically failing schools. A recent external evaluation of the new schools reform work in Oakland found that new schools more frequently accelerated math and English–language arts performance when compared to other district schools and that new schools significantly outperformed the schools they replaced in academic achievement, suspension rates, attendance rates, and overall student, teacher, and parent satisfaction.

Prior to that, she was the founding principal of ASCEND, one of the five original new small and autonomous schools opened in Oakland, California, a school recognized for accelerating achievement and engaging community. Ms. Thomas started teaching in Oakland through Teach for America in 1993 and continued teaching for six years before becoming a site administrator. During this time, she also worked as the Special Education school director for the Teach for America Summer Institute. She holds a B.A in Economics from the University of Pennsylvania, a Master's in Curriculum and Instruction from the University of San Francisco, and a Master's in Administration, Planning, and Social Policy from Harvard University.

**Jonathan Schorr**

Jonathan Schorr is a partner in the San Francisco office of the NewSchools Venture Fund. Jonathan leads NewSchools' field building efforts, including the annual Summit and the Community of Practice, and oversees NewSchools' policy advocacy, publications, and public relations as well as data analysis. In addition, like other partners, Mr. Schorr has responsibility for investment strategy and management. He is also a lecturer at Stanford University's graduate school of education.

Prior to joining NewSchools, Mr. Schorr served as Director of New Initiatives at the KIPP Foundation, overseeing the Foundation's work in elementary schools and high schools and its services to its alumni nationwide. KIPP (Knowledge Is Power Program) is a family of more than 50 high-performing inner-city public schools.

Mr. Schorr has worked as an author, journalist, and teacher. His critically acclaimed first book, *Hard Lessons: The Promise of an Inner-City Charter School*, was published by Ballantine Books in the fall of 2002. The book was written under a fellowship from the Open Society Institute, where Schorr was a fellow. Previously, he was an education reporter with *Oakland Tribune*, and has also written on education in the *New York Times*, the *Los Angeles Times*, *Education Week*, *The Nation*, *Teacher Magazine*, the *Washington Monthly*, Salon.com, and other publications. His writing has won numerous awards, including a national education writer's award and the

Outstanding Young Journalist prize from the Northern California Society of Professional Journalists.

Born and raised in Washington, D.C., Jonathan graduated from Yale University with a degree in sociology in 1990. He taught public high school for three years in Southern California as a member of the founding corps of Teach for America before moving to Oakland, California, where he has lived since 1994.

**Jeff Liaw**
Jeffrey Liaw is an investment professional at TPG Capital, a global private equity investment firm, and is focused on the firm's efforts in industrials/manufacturing and energy & power investments. He serves on the board of directors of Graphic Packaging, a NYSE-listed consumer packaging company, Energy Future Holdings (formerly TXU Corp), a leading integrated power company based in Dallas, and Oncor Electric Delivery, a leading transmission and distribution utility. He received his MBA from Harvard Business School with high distinction and is a Phi Beta Kappa graduate of the University of Texas.

**Kevin Wooldridge**
Kevin Wooldridge, founder and Chief Executive Officer of Education for Change, was previously an Executive Director in OUSD supervising 13 elementary schools. He has been a bilingual educator for 29 years, working in three Bay Area school districts at school sites and in the central office. He was a principal designer of OUSD's bilingual program model. Mr. Wooldridge also has many years of experience implementing and supporting programs that use the arts to extend and enhance core literacy and mathematics programs. In collaboration with the Museum of Children's Art in Oakland, he has developed "The Art in Open Court: Making Connections" for use in kindergartens.

## Board of Directors Responsibilities

**The Board of Directors of EFC is responsible for:**

- Legal and fiscal well-being of the organization and each EFC school.
- Hiring and evaluating the EFC Chief Executive Officer.
- Approving and monitoring the implementation of the organization's policies.
- Developing and monitoring an overall operational business plan that focuses on student achievement.
- Approving and monitoring the organization's annual budget and fiscal policies.
- Acting as fiscal agent. This includes the receipt and management of funds for the operation of the organization in accordance with all applicable laws and the mission statement of the organization.
- Contracting with an external auditor to produce an independent annual financial audit according to generally accepted accounting practices.
- Regularly measuring both student and staff performance.
- Encouraging active involvement of students, parents/guardians, grandparents, and the community.

- Performing all of the responsibilities provided for in the California Corporations code, the Articles of Incorporation, Bylaws, and this charter as required to ensure the proper operation of the organization and member schools.

The Board may initiate and carry on any program or activity or may otherwise act in a manner that is not in conflict with or inconsistent with or preempted by any law and that is not in conflict with the purposes for which the schools are established.

The Board may execute any powers delegated by law to it and shall discharge any duty imposed by law upon it and may delegate to an employee of the Charter School any of those duties with the exception of budget approval or revision, approval of the fiscal and performance audits, and the adoption of Board policies. The Board, however, retains ultimate responsibility over the performance of those powers or duties so delegated.

***Relationship Between EFC and the School Principal***

EFC, as the nonprofit operating the Charter School, is responsible for overseeing the operations of the school. Under the policies established by the Board of Directors of EFC, the principal reports to EFC's Chief Executive Officer for day-to-day management issues. The principal coordinates all campus-level planning and decision making that involves the school's professional staff, parents/guardians, and community members in establishing and reviewing the school's educational plans, goals, performance objectives, and major classroom instructional programs. This allows the principal, teachers, parents/guardians, and community members to make school-based decisions within the boundaries of the decisions and policies set by the Board of Directors.

EFC has recently embarked on an EFC Essentials Initiative. The Initiative is an effort to develop a common understanding of the essential functions of everyone's job. Across all jobs is an expectation that individuals will follow through consistently on commitments and maintain high standards for all students without excuses. The essentials are used to evaluate an employee's performance at an EFC school.

Please see organizational chart attached as appendix # 3.

The EFC CEO's Essentials are:

- **Provide** regular ongoing oral and written feedback and coaching to all administrative staff to ensure the Essentials drive all decision making
- **Work strategically** with the Chief Academic Officer to ensure EFC is effectively and consistently supporting administrators and teachers to maximize the quality of instruction and therefore student academic outcomes
- **Work strategically** with the Director of Business and Finance to ensure the ongoing fiscal health of the organization
- **Work strategically** with the Director of Site Services to ensure EFC actively seeks staff input and respond appropriately to maximize work conditions and organizational effectiveness
- **Engage** all stakeholders in promoting a deeper understanding of and support for EFC's mission

- **Work strategically** with the Home Office staff to ensure service oriented support for school sites
- **Work strategically** with the EFC Board to implement policies and regulations to provide support, clarity, and direction for EFC's mission
- **Work strategically** to strengthen existing relationships and establish new relationships with the funding community

The Cox Principal's Essentials are:

- **Keep** current with observations and feedback
- **Lead** PD and teacher development at the school site supported by Home Office staff
- **Be** adequately prepared and organized to engage in ongoing progress discussions (with complete and accurate documentation) on where each teacher is in his/her development while making sure that this is consistently and clearly communicated to **each** and **every** teacher
- **Be** clear with classified staff about what the EFC standard is and support them and give them ongoing feedback so they reach and maintain it
- **Set** and reinforce an appropriate high standard of behavior for **all** students: make it clear that, e.g., all rules will be followed; at EFC adults do not make requests multiple times to achieve compliance; adults do not try to talk over children
- **Hold** ongoing planning meetings with appropriate staff members to ensure good communication, smooth operations, and a high degree of efficiency
- **Maintain** the same standard for EFC students that they do for their own children/relatives
- **Come** to the table focused on how EFC can make this happen

The Principal's primary responsibilities are:

- Lead the school in accordance with the EFC vision and mission.

- Provide instructional leadership guidance including monitoring of the implementation of the established curriculum, identifying professional development needs for the staff, maintain high expectations and standards for all student achievement, coordinate administration of standardized testing, and monitor and support classroom instruction.

- Manage and lead the Instructional Leadership Team (which includes representative(s) from administration, teachers, support staff, and parents/guardians).

- Facilitate communication between all school stakeholders.

- Supervision, evaluation, and discipline of all other employees according to the mission, philosophy, and obligations defined in the charter petition.

- Overseeing the day-to-day operations of the school with the support of the Business Operations Manager.

- Reporting to the school's stakeholders, including the EFC Board on the progress of the school in achieving educational success.

- Overseeing and supporting the development and implementation of all programs.

- Attending EFC's administrative meetings as necessary and stay in direct contact with EFC changes, progress, etc.

- Communicating and coordinating as necessary with EFC staff on Board meeting agendas, professional development scheduling, grant writing and fundraising, policies and procedures, documenting and sharing of best practices, and annual budgeting.

- Participate in the dispute resolution procedure and the complaint procedure when necessary.

- Collaborating with other EFC principals and Home Office staff

***Characteristics of Effective EFC Principals***

General Leadership

- Demonstrates high degree of ownership for all outcomes and operations
- Clearly identifiable and effective lead on setting appropriate EFC standard for ALL
- Has a "no excuse" orientation
- Appropriately communicates sense of urgency

Academic/Instructional Management

- Has clearly organized and fully implemented plan to provide appropriate supervision, adequate support, and effective feedback to maximize teacher performance
- Effectively prioritizes efforts to maximize student achievement
- Promotes high standards for student achievement

Employee Supervision

- Makes duties and responsibilities clear for all employees
- Provides each employee with a very clear understanding of how s/he is performing
- Has clearly identified areas of development for each employee
- Gives timely feedback on regular basis to each employee
- Provides training and/or coaching and support for all employees
- Uses evaluation system including improvement plans appropriately

Operations Management

- Ensures there are clear systems and procedures for smooth, efficient operations
- Ensures routines and procedures are clear and used consistently as appropriate
- Leads ongoing planning and communication and appropriate monitoring
- Ensures systems are designed to effectively support primary school functions

Student Safety and Behavior Management

- Effectively supports a high standard of student behavior, supports a positive learning environment, and provides appropriate behavioral intervention
- Maintains appropriate systems to support and ensure adequate student supervision
- Effectively communicates and enforces appropriate school rules
- Provides training, monitoring, feedback, and/or coaching to ensure appropriate and effective interactions with students
- Promotes and models high standards for student behavior in and out of classrooms

Attendance Management

- Monitors and actively manages student attendance
- Ensures systems and procedures are in place to maximize student attendance
- Ensures SART and other intervention processes are operating effectively

Organization, Timely Follow-through and Orientation to Detail and Accuracy

- Effectively tracks and manages duties
- Responds to obligations, communications and planning within effective time ranges
- Completes tasks appropriately with a high degree of accuracy and on time
- Follows through on commitments made to all members of the EFC community
- Arrives punctually to all meetings, activities, and events

Interpersonal Skills and Attitude

- Demonstrates a high level of professionalism
- Drives plans and actions based on what is best for all students (not filtered by personal needs or wishes)
- Receives and responds to constructive critical feedback appropriately
- Interacts with others with a high degree of appropriateness and effectiveness
- Builds rapport and open lines of communication with all stakeholders

***Leadership Council of EFC***

The Leadership Council was formed so that staff members from each school could provide information from and to the Home Office. The Leadership Council members were nominated by their principals. However, all staff are invited to the meetings. Typically, administrators are not part of the meetings, so that staff members may feel free to discuss issues.

The agenda is developed at the end of each meeting by the Leadership Council members. The Leadership Council meeting notes are distributed to all staff after the meeting. Any staff member can ask for clarification or comment on items discussed during the meeting. The dates for the meetings are voted on and agreed upon by the current members.

Some of the issues that were discussed this past year are:

- Email policy
- Report cards
- Summer committees

- Balancing high quality work with instruction time
- Charter renewal
- Calendar and schedule
- Attendance incentives
- Benefits
- Intervention
- Curricular coherence

***Parent Leadership Council***

Parent involvement has increased measurably at Education for Change at Cox Elementary over the last five years. Through grade level meetings and parent center activities, many parents have become regular fixtures at the school. However, we realize that there is a need to increase the level of parent involvement in school governance. To this end, Education for Change at Cox Elementary will establish a structure for election of officers for the parent leadership council. This will help insure ongoing, consistent involvement and training for parent leadership development. The Parent Leadership council will participate in ongoing evaluation of the school's program and operations, school and community concerns and priorities for improvement.

Education for Change at Cox Elementary has formed a Parent Leadership Council that may, among other tasks, present feedback and information to the governing board. The Parent Leadership Council allows parents to provide meaningful input on the strengths and weaknesses of the school, the school program and operations. Cox has also worked with parents to develop and adopt a set of parent involvement policies and strategies with varying degrees of success over the last four years. The Parent Leadership Council coupled with the new Scholars Program, mentioned earlier, is an attempt to improve parent communication and involvement at Cox to help ensure the academic success of Cox students.

EFC promotes parent engagement programs at all of its schools. As enrollment at EFC schools is based on student and parental choice, consistent and continual communication with parents about the expectations the school has for their children is critical. Parents/guardians are expected to actively engage in their children's education by being active in school events, assisting their children to achieve at the highest levels, scheduling specific homework time, and providing a quiet environment for their children's studies. Cox believes the Scholars Program will be an effective mechanism to help ensure that all parent engagement goals are met.

***Dine and Delve***

Dine and Delve was established after the first year of EFC's existence so that all staff could have an opportunity to understand the mission and vision of EFC and to share ideas with the CEO. As the name indicates, sharing a meal while talking about issues makes for a more comfortable conversation after a long work day.

The vision and mission are shared at each Dine and Delve. The goal is to make sure that all staff members, certificated and classified, have an opportunity to voice their concerns and offer ideas to make the organization better. Staff members also have an opportunity to ask questions of the CEO and to meet with him individually after the meeting or in small interest groups.

The following are examples of questions used to provoke conversation among participants:

- What has EFC done that is evidence of our mission in motion?
- What should EFC be doing differently to more effectively promote our mission?
- What has EFC done to reflect what it strives to offer its employees?
- What can we do together to make EFC a better place to work?
- What can you do to further the mission of EFC?

## Qualifications for School Employees

Governing Law: The qualifications to be met by individuals to be employed by the school.
—California Education Code Section 47605(b)(5)(E)

*Application Process*

Education for Change at Cox Elementary will not discriminate against any employee on the basis of race, color, creed, age, gender, national origin, disability, religion, sexual orientation, or marital status. Education for Change at Cox Elementary will adhere to California laws, including fingerprinting and prohibitions regarding the employment of any person who has been convicted of a violent or serious felony.

Education for Change at Cox Elementary implements specific and continuing steps to notify applicants for admission and employment, students and parents of elementary and secondary school students, employees, sources of referral of applicants for admission and employment, and all unions or professional organizations holding collective bargaining or professional agreements with the recipient, that it does not discriminate on the basis of sex or mental or physical disability or any other characteristic described in Education Code Section 220 in the educational program or activity which it operates, and that it is required by Title IX and Section 504 not to discriminate in such a manner.

All employees must furnish or be able to provide:

1) Proof of negative tuberculosis (TB) testing or negative chest X-ray for TB in accordance with Education Code Section 49406.
2) Fingerprinting for a criminal record check. Education for Change at Cox Elementary will process all background checks as required by Education Code Section 44237.
3) Documents establishing legal employment status.

Employees' job classification and work basis will be specified in individual employment agreements. These agreements may take the form of employment contracts, at-will employment agreements, or other agreements. All agreements not specifically stating that they are employment contracts will be deemed to be at-will employment agreements. Agreements may be renewed based on demonstration of meeting or exceeding the requirements of individual agreements and adhering to policies, procedures, and expectations. These expectations will be designed to support the mission and vision of the school and to comply with state laws.

The teaching application procedure will include a written application and review of references and may include teaching observations. Prior to the signing of agreements, when possible, applicants will be encouraged to spend time with the principal and teachers or other staff members to ensure that they share the school's mission and vision.

***Administrative Staff***

The EFC CEO develops and coordinates the hiring and evaluation process for principals. The principal is responsible for hiring all other school-site administrative staff according to the budget and with input from appropriate Home Office staff. Selection is based on proven experience in educational leadership, educational vision, demonstrated ability in program design and ability to provide effective instructional leadership, and interest in and commitment to educational reform.

***Teachers***

As with students and parents/guardians, teachers make a specific choice to be part of the Education for Change at Cox Elementary team. EFC teachers meet the requirements for employment as stipulated by the California Education Code section 47605(l). Primary teachers of core, college preparatory subjects (English–language arts, mathematics, science, history, and special education) hold a Commission on Teacher Credentialing certificate, permit, or other document equivalent to that which a teacher in a noncharter public school would be required to hold. These documents are maintained on file at EFC and at the school and are subject to periodic inspection by OUSD and the Alameda County Office of Education. Teachers in non-core, non–college preparatory subjects meet the requirements the State allows for a charter school.

EFC follows the development of the regulations to implement "Highly Qualified" requirements under the No Child Left Behind Act (NCLB) and ensures that the qualifications for all teachers follow the regulatory guidelines set by the state with regard to this law. This includes monitoring that the "highly qualified" teacher requirements of NCLB are met which ensure that teachers meet the following three factors unless otherwise exempt under the law:

1. Teacher possesses appropriate state certification or license;
2. Teacher holds a bachelor's degree; and
3. Teacher passed a rigorous test, relevant major or coursework, or state evaluation demonstrating subject matter competency.

The principal, with the advice of EFC's staff, selects the teachers on an application and interview basis. Selection of teachers is based on their teaching experience, the degree of subject matter expertise, and their ability to demonstrate effective classroom instructional capabilities. Inexperienced or emergency credentialed teachers are hired on educational experience, work experiences deemed beneficial to education, and résumés with good references. All prospective teaching staff must show a strong desire to teach an academically rigorous curriculum, commit to an extended school day (fully compensated), and continue their professional development during the school's prescribed professional development days (fully compensated). Additionally, all teaching staff must meet any additional guidelines and standards set by the school and EFC.

Responsibilities for the teachers include:

- Preparing and implementing effective lesson plans that lead to student understanding of the pre-established curriculum content.
- Assessing and facilitating student progress in line with the student and school outcome goals.
- Maintaining accurate records.
- Participating in professional development activities.
- Maintaining frequent communication with students and their families, colleagues, and other school stakeholders.
- Maintaining regular, punctual attendance.

The Cox Teacher Essentials include:

- **Consistently deliver** EFC's instructional program with a high level of student engagement and appropriate rigor
- **Consistently** cognitively plan with adopted curriculum
- **Engage** in ongoing collaborative work with colleagues to strengthen EFC's ability to deliver high level homogenous outcomes for all students
- **Be** self-reflective and always strive to improve at the craft of teaching
- **Use** data effectively to improve student, grade level, and school academic outcomes
- **Consistently** hold all students to high standards of work and behavior
- **Maintain** open and effective lines of communication with all stakeholders
- **Maintain** a positive, organized, and productive learning environment

Teachers are evaluated based on the following skills of an effective teacher at an EFC school:

*Program implementation*
Open Court
- Teacher is very effectively implementing the instructional program.
- Instructional goals are evident and instruction consistently supports those goals.
- Teacher has an explicit understanding of the program design.
- Workshop plans reflect a thoughtful effort to implement the instructional programs and to differentiate instruction, and this is always evident in implementation.
- Assessment results are adeptly used to improve instruction and target students not achieving projected gains.

Saxon Math
- Teacher always follows structure of the EFC program with appropriate use of TM's and internalized routines and procedures as appropriate.
- Teacher demonstrates a clear and consistent ability to differentiate instruction effectively and provide consistent high quality remediation.

ELD
- Teacher provides appropriate instruction in which specific language structures are taught.
- Instruction always effectively balances oral and written activities.
- Teacher demonstrates an ability to differentiate instruction.

- Instruction effectively supports learning in other core subject areas.

*Instructional practice*
Pace
- Instruction is delivered at an effective pace. The teacher has an excellent understanding of how to vary pace based on of difficulty, need for clarity, and level of student engagement, adjusting efficiently and effectively throughout the lesson while adeptly scaffolding for all students.

Instructional dialogue
- Teacher always communicates with a high degree of clarity, monitoring student response appropriately, prompting and redirecting and delving as needed. Vocabulary choice is always very good and/or the appropriate cognitive demand is on all students. Communication is concise, with time always used with highest degree of proficiency.

Engagement and use of instructional time
- Students are always engaged and responsive.
- Transition times are smooth and consistent classroom routines are evident.
- Teacher is eager to provide support to other teachers who observe his/her instruction.

Use of assessments and data
- Teacher has excellent knowledge of the use of assessment to improve the quality of instruction. - Assessments are being used to systematically to diagnose student need and inform instruction with a very high degree of proficiency.
- Teacher has an excellent grasp of what is appropriate to review and how to prepare students based on assessment purpose.
- Student benchmark assessment data provides an extremely accurate view of student classroom performance levels and is a very accurate predictor of more formal assessment results.

***All Staff Requirements***

All EFC and school staff commit to:

- Abide by federal, state, and local laws;
- Maintain a professional relationship with all students;
- Refrain from the abuse of alcohol or drugs during the course of professional practice;
- Exemplify honor and integrity in the course of professional practice, particularly in the use of public funds and property;
- Comply with state, federal, and local laws regarding the confidentiality of student records;
- Fulfill the terms and obligations detailed in the charter;
- File necessary reports of child abuse; and
- Maintain a high level of professional conduct.

***Other Certificated Staff***

A pool of day-to-day at-will (on-call) qualified substitutes, with appropriate background clearances, is established and a list of qualified substitutes is maintained.

**Classified Personnel**

Classified personnel are selected by the principal with the support of EFC's staff on an application and interview basis. Selection is based on the ability to perform the job duties for the positions consistent with the philosophy and mission of the school as set forth in the charter petition, and will include office personnel and custodial personnel. Classified positions at the school site include administrative assistants, office managers, and other clerical positions as needed and allowed in the budget.

The following Essentials have been developed for the classified positions of the Office Manager and the Business and Operations Manager (BOM) at Cox.

*The Office Managers' Essential List*

- **Maintain** well-organized and accurate records including student and staff attendance, inventories, compliance requirements, etc.
- Provide adequate guidance and support for other office staff
- **Maintain** an organized, inviting office environment
- **Support** the principal in maintaining a calendar of all school activities and deadlines
- **Ensure** there is an efficient, well-defined system for requesting and distributing supplies
- **Ensure** that all school supplies are adequately stocked and inventoried
- **Be** proactive in problem solving areas where improvements can be made to increase effectiveness and efficiency in school operations
- **Help** hold students who enter the office to an appropriate standard of behavior
- **Ensure** there is a high degree of service-oriented support for all school staff and community members

*The BOMS' Essential List*

- **Maintain** well-organized and accurate paper and Excel records for intervention program, food service, and facilities including attendance records, time sheets, permission slips, etc.
- **Complete** any reports in an accurate and timely manner
- **Maintain** regular ongoing structured contact with principals to ensure that programs run smoothly and that everyone is informed of all food service, facilities, and intervention issues/changes
- **Provide** adequate guidance and support for designated staff
- **Maintain** an organized inviting office environment
- **Ensure** that all intervention, janitorial, and food service supplies are adequately stocked and inventoried to be always available
- **Be** proactive in problem solving areas where improvements can be made to increase effectiveness and efficiency in the school
- **Ensure** there is a high degree of service-oriented support for all school staff members
- **Always** be prepared to step out of daily routine to ensure that the school runs efficiently (in emergencies or as circumstances dictate)

- **Ensure** that summer cleaning is strategically planned and carried out
- **Help** ensure that school environment is always clean and well organized

**Staff Evaluation Plan**

The principal is responsible for evaluating all teachers and support staff. School staff evaluation is performed at least annually. The principal may request support from the EFC academic support team to observe teachers in the classroom in order to determine their effectiveness as facilitators of learning and their ability to reach children using various modalities. A critical part of teacher evaluation and retention will be based on performance outcomes, measuring students' achievement and the teacher's implementation of the curriculum.

EFC is in the process of refining new evaluation tools aligned to the essentials of each position developed through the Essentials Initiative outlined earlier. For example, teacher evaluation places heavy emphasis on implementing the instructional programs with fidelity and demonstrating a high level of competence in their instructional practice as outlined above as the skills of an effective teacher.

Connected to the Essentials Initiative, EFC is changing the expectations of the senior management, making each team member more directly responsible for the success of EFC schools.

As partners with the schools, the senior managers are part of a team working for the school's success. Meeting regularly with school site administrators, they will monitor and support instructional practice, professional development, teacher and other employee evaluations, and student and family support systems. They will also join the principals in presenting student data and improvement strategies to the entire management team in ongoing accountability meetings.

The following is a sample of a "monitoring grid" utilized to evaluate ongoing compliance with Essentials:

| Essential Focus Area | Purpose - Key Information | Required Documentation |
|---|---|---|
| Current Certificated Evaluations | Ensure the evaluation process is effectively, continuously, consistently and equitably used to improve the quality of the EFC instructional program | -Pacing Plan and Status<br>-Observations<br>-Midterm/final Performance Rubric |
| Current Classified Evaluations | Ensure the evaluation process is effectively, continuously, consistently and equitably used to improve the quality and consistency of the support to school operations and functions | -Pacing Plan and Status<br>-Classified Evaluation Forms<br>-Individual Development Planning Sheet |
| Target Teacher Development Status | Be adequately organized and prepared to engage in on-going progress of practice discussions with complete and | -Focus Overview<br>-Observations Forms<br>-Status Report (where |

| Essential Focus Area | Purpose - Key Information | Required Documentation |
|---|---|---|
| | accurate documentation about where each teacher is in her/his development | each one is in her/his practice)<br>-Vital Signs Link |
| Non Target Teacher Monitoring Status | Be adequately organized and prepared to engage in on-going progress of practice discussions with complete and accurate documentation about where each teacher is in her/his implementation of the EFC instruction program | -Focus Overview<br>-Observations Forms<br>-Status Report (where each one is in her/his practice)<br>-Vital Signs Link |
| PD Report | Be adequately organized and prepared to provide an informative status report on the site PD program | -Report on Feedback<br>-Articulated CAO Data Link |
| Behavior/Student Supervision Status Report | Provide evidence the appropriate standards are being set and effectively enforced | -Referral and Detention Data<br>-Suspension Report<br>-Supervision Plans and Status Report<br>-Incentive Plan Status Report |
| Team and Sub Team Planning | Provide evidence the appropriate planning meetings are occurring as required and there is a system in place to ensure timely communication about, and tracking, implementation, and monitoring of school activities and events | -Meeting agendas<br>-Monthly Calendars and timelines<br>-Follow-up plans for areas of need |
| Monitoring of Systems | Ensure there is a system in place to monitor:<br>Attendance<br>Intervention<br>SST's<br>Site Cleanliness and Stocking of Supplies<br>Parent Engagement | -Attendance Overview Report<br>-Intervention Attendance and Observation Status Report<br>-SST Status Report<br>-Engagement calendar and sign-in sheets |

Please see appendix # 4 for teacher evaluation forms.

***Sample Staff Evaluation Plan***

| | |
|---|---|
| **Pre-Conference Meeting** | • Make sure both principal and teacher understand the purpose of evaluation |
| **Goal Setting Conference** | • Teacher develops a performance agreement and sets goals for professional development<br>• Review rationale for each of the teacher's professional goals<br>• Evaluate goals in relation to observations<br>• Require one or more different goals, if necessary<br>• Agree on goals for professional development<br>• For each goal, clearly establish the means of achievement and the criteria for success<br>• Teacher writes up the agreement<br>• Principal reviews, approves, and saves for future evaluation |
| **Performance Progress Conference** | • Review professional goals: means of achievement and criteria for success<br>• Describe performance related to criteria<br>• Compare performance to criteria<br>• Discuss observation/evaluation<br>• Discuss goals for next period<br>• Principal summarizes goals, criteria, and findings<br>• If in agreement, teacher and principal sign and file review<br>• (Next period begins process from the beginning with input from recently concluded review period to be incorporated) |

Just as staff are expected and encouraged to grow and achieve at high levels, so are these expectations applied to the principal and the school. As described in the accountability monitoring grid above, the EFC staff work with the sites to ensure that the mission of the school is being met, that all students are meeting high levels of achievement, that staff are well supported, and that the sites are safe learning environments.

## Employee Rights

Governing Law: The manner by which staff members of the charter schools will be covered by the State Teachers' Retirement System, the Public Employees' Retirement System, or the federal social security. —California Education Code Section 47605(b)(5)(K)

***Work Basis***

Employee hours per week will be based upon individual employee work agreements. The standard work week for all staff is 40 hours per week.

***Compensation***

EFC provides total compensation to individual employees that is competitive with other private and public schools for comparably qualified and experienced employees, i.e., Cox offers compensation that assures the successful recruitment of employees that enable the school to fulfill its mission and goals. Specific salaries and stipends are identified within the individual work agreements. Currently, teaching salary averages are as follows:

| | Salary 2008-09 | Salary 2009-10 |
|---|---|---|
| **Low** | $43,707 | $44,696 |
| **Median** | $50,357 | $51,519 |
| **High** | $76,890 | $79,555 |

***Benefits***

Mandatory benefits such as workers compensation, unemployment insurance, Medicare and social security (for non-STRS employees) are provided by EFC, as well as life, health, dental, vision, and related benefits as part of the total compensation package for each employee determined as part of the individual work agreement.

***Retirement***

Eligible certificated employees participate in State Teachers Retirement System (STRS), in which the employer and the employee each contribute the statutory amount. Eligible classified employees participate in Public Employee Retirement System (PERS), in which the employer and the employee each contribute the statutory amount. All employees, with the exception of STRS participants, participate in the Federal Social Security Program.

## Labor Relations

Governing Law: A declaration whether or not the charter school shall be deemed the exclusive public school employer of the charter school for the purposes of the Educational Employment Relations Act (Chapter 10.7 [commencing with Section 3540] of division 4 of Title 1 of the Government Code). —California Education Code Section 47605(b)(5)(O)

EFC is the exclusive public employer of all employees of the charter school for collective bargaining purposes. As such, EFC complies with all provisions of the Educational Employment Relations Act (EERA), and acts independently from the Oakland Unified School District for bargaining purposes.

## Employee Return Rights

Governing Law: A description of the rights of any employee of the school district upon leaving the employment of the school district to work in a charter school, and of any rights of return to the school district after employment at a charter school. —California Education Code Section 47605(b)(5)(M)

Job applicants for positions at EFC schools are considered through an open and fair process, and those persons hired enter into a work agreement with EFC. Any OUSD union employee who is offered employment and chooses to work for EFC is not covered by his or her respective collective bargaining agreement unless a side letter is specifically negotiated, although comparable protections and benefits may be extended in the individual work agreements.

The Charter School recognizes that it may not confer any return rights upon any former employee of the District.

## Health and Safety

Governing Law: The procedures that the school will follow to ensure the health and safety of pupils and staff. These procedures shall include the requirement that each employee of the school furnish the school record summary as described in Section 44237. —California Education Code Section 47605(b)(5)(F)

***Procedures for Background Checks***

All EFC schools comply with the provisions of Education Code Section 44237 and 45125.1 regarding the fingerprinting and background clearance of employees, contracts contractors and volunteers and work-site participants prior to employment, and/or contract, or for volunteers any one-on-one contact with pupils of the school without the supervision of a credentialed employee. The Human Resources Manager monitors this policy.

***Role of Staff as Mandated Child Abuse Reporters***

All classified and certificated staff are mandated child abuse reporters and follow all applicable reporting laws, the same policies and procedures used by schools within the Alameda County Office of Education Service Area.

***TB Testing***

All staff at the school will meet the Alameda County Office of Education TB testing requirements in accordance with Education Code Section 49406.

***Immunizations***
The school adheres to all law related to legally required immunizations for entering students pursuant to Health and Safety Code Sections 120325–120375 and Title 17, California Code of Regulations Sections 6000–6075.

***Medication in School***
The school adheres to Education Code Section 49423 regarding administration of medication in school.

***Vision/Hearing/Scoliosis***
The school adheres to Education Code Section 49450 et seq. as applicable to the grade levels served.

***Emergency Preparedness***
The school adheres to an Emergency Preparedness Handbook drafted for Education for Change at Cox Elementary. This handbook includes but is no limited to the following responses: fire, flood, earthquake, terrorist threats, hostage situations, and heart attacks.

***Blood-Borne Pathogens***
The principal, or designee, meets state and federal standards for dealing with blood-borne pathogens and other potentially infectious materials in the workplace. The principal, or designee, has established a written "Exposure Control Plan" designed to protect employees from possible infection due to contact with blood-borne viruses, including human immunodeficiency virus (HIV) and hepatitis B virus (HBV).

Whenever exposed to blood or other body fluids through injury or accident, students and staff should follow the latest medical protocol for disinfecting procedures.

***Drug Free / Smoke Free Environment***
The school maintains a drug and alcohol and smoke free environment.

***Procedures***
The school has adopted procedures to implement the policy statements listed above prior to operation. The school has developed a school safety plan. The school safety plan is guided by Education Code Section 35294(a).

## Dispute Resolution Procedures

Governing Law: The procedures to be followed by the charter school and the entity granting the charter to resolve disputes relating to provisions of the charter. —California Education Code Section 47605(b)(5)(N)

*Internal Disputes*

Education for Change at Cox Elementary has established complaint procedures that address both complaints alleging discrimination or violations of law and complaints regarding other areas. Education for Change at Cox Elementary will not, at any time, refer complaints to the District. If the District receives any complaints about Education for Change at Cox Elementary the District will refer any complaints or reports to the Board or administrative staff of Education for Change at Cox Elementary for resolution. OUSD staff will instruct any Cox stakeholder who attempts to lodge a complaint with OUSD to stop their explanation of the situation and inform them that all complaints must be directed directly to EFC or Education for Change at Cox Elementary personnel. OUSD agrees not to intervene or become involved in any internal dispute unless the Board of EFC has requested OUSD to intervene in the dispute.

The complaint procedures include the clear information with respect to the response timeline of the school, whether the school's response will be in writing, the party identified to respond to complaints, the party identified and charged with making final decisions regarding complaints, and whether the final decision will be issued in writing. The procedures also identify an ombudsperson for situations in which the school leader is the subject of the complaint. The complaint procedures are clearly articulated in the school's student and family handbook and distributed widely.

Education for Change at Cox Elementary will designate at least one employee to coordinate its efforts to comply with and carry out its responsibilities under Title IX of the Education Amendments of 1972 (Title IX) and Section 504 of the Rehabilitation Act of 1973 (Section 504) including any investigation of any complaint filed with Education for Change at Cox Elementary alleging its noncompliance with these laws or alleging any actions which would be prohibited by these laws. Education for Change at Cox Elementary will notify all its students and employees of the name, office address, and telephone number of the designated employee or employees.

Education for Change at Cox Elementary will adopt and publish grievance procedures providing for prompt and equitable resolution of student and employee complaints alleging any action, which would be prohibited by Title IX, or Section 504.

*Disputes with the District*

The staff and EFC Board members of Education for Change at Cox Elementary agree to attempt to resolve all disputes between the District and Education for Change at Cox Elementary regarding this charter pursuant to the terms of this section. Both will refrain from public commentary regarding any disputes until the matter has progressed through the dispute resolution process.

Any controversy or claim arising out of or relating to the charter agreement between the District and Education for Change at Cox Elementary, except any controversy or claim that in any way related to revocation of this charter, shall be handled first through an informal process in accordance with the procedures set forth below.

(1) Any controversy or claim arising out of or relating to the charter agreement, except any controversy or claim that in any way related to revocation of this charter, must be put in writing

("Written Notification") by the party asserting the existence of such dispute. The Written Notification must identify the nature of the dispute and all supporting facts known to the party giving the Written Notification. The Written Notification may be tendered by personal delivery, by facsimile, or by certified mail. The Written Notification shall be deemed received (a) if personally delivered, upon date of delivery to the address of the person to receive such notice if delivered by 5:00 PM or otherwise on the business day following personal delivery; (b) if by facsimile, upon electronic confirmation of receipt; or (c) if by mail, two (2) business days after deposit in the U.S. Mail. All written notices shall be addressed as follows:

To Charter School, c/o Chief Executive Officer:
Education for Change at Cox Elementary
**Address:**303 Hegenberger Road Suite 301
Oakland, CA 94621
**Phone:** 510-904-6300

To Coordinator, Office of Charter Schools:
Office of Charter Schools
Oakland Unified School District
1025 Second Avenue, Room 206
Oakland, California 94606

(2) A written response ("Written Response") shall be tendered to the party providing the Written Notification within twenty (20) business days from the date of receipt of the Written Notification. The Written Response shall state the responding party's position on all issues stated in the Written Notification and set forth all facts that the responding party believes support its position. The Written Response may be tendered by personal delivery, by facsimile, or by certified mail. The Written Response shall be deemed received (a) if personally delivered, upon date of delivery to the address of the person to receive such notice if delivered by 5:00p.m., or otherwise on the business day following personal delivery; (b) if by facsimile, upon electronic confirmation of receipt; or (c) if by mail, two (2) business days after deposit in the U.S. Mail. The parties agree to schedule a conference to discuss the claim or controversy ("Issue Conference"). The Issue Conference shall take place within fifteen (15) business days from the date the Written Response is received by the other party.

(3) If the controversy, claim, or dispute is not resolved by mutual agreement at the Issue Conference, then either party may request that the matter be resolved by mediation. Each party shall bear its own costs and expenses associated with the mediation. The mediator's fees and the administrative fees of the mediation shall be shared equally among the parties. Mediation proceedings shall commence within 60 days from the date of the Issue Conference. The parties shall mutually agree upon the selection of a mediator to resolve the controversy or claim at dispute. If no agreement on a mediator is reached within 30 days after a request to mediate, the parties will use the processes and procedures of the American Arbitration Association ("AAA") to have an arbitrator appointed.

(4) If the mediation is not successful, the parties agree that each party has exhausted its administrative remedies and shall have any such recourse available by law

## Admissions Requirements

Governing Law: Admission Requirements, if applicable. —California Education Code Section 47605(b)(5)(H)

Education for Change at Cox Elementary accepts all students who are residents of the State of California and will not discriminate on the basis of race, ethnicity, gender, religion, national origin or disability or any other characteristic described in Education Code Section 220. As Cox is a charter school, students living in the previous attendance area will have preference for admission. The school is a public elementary school and does not charge tuition. EFC is committed to maintaining a diverse student population, utilizing outreach efforts to recruit students who traditionally have been underserved. No student residing within the boundaries of the Oakland Unified School District shall be required to attend the charter school, and alternative school choices are available at other elementary schools within the Oakland Unified School District.

All students who are interested in enrolling at the school are required to complete an application for admission. Applicants must meet the minimum age for public school admission.

No specialized admission tests are required; however, tests may be administered to determine the proper placement of students. All students who wish to enroll in the school are enrolled unless the number of applications exceeds the number of seats available. An open enrollment period is held to determine the amount of applications for enrollment.

If the number of admission applications exceeds the enrollment capacity by an enrollment deadline established by the EFC Board, a public random drawing is held. Existing students of Education for Change at Cox Elementary have an automatic right to continued enrollment in the school should they wish to do so and shall not need to be included in the public random drawing. EFC does, however, grant preference in the public random drawing as follows:

**1)** Siblings of students already attending Cox Elementary;

**2)** Children of Cox Elementary educators, administrators, and staff;

**3)** Residents within the Oakland Unified School District.

Any applications not accepted through this public random drawing due to capacity limitations are used to develop a wait list pool of applicants should space become available, in the order in which they were drawn. Additional applications are accepted on an ongoing basis and are added to the wait list pool until there is a need for a second lottery when a space becomes available. The wait list does not carry over from one school year to the next.

## Racial and Ethnic Balance

Governing Law: The means by which the school will achieve a racial and ethnic balance among its pupils that is reflective of the general population residing within the territorial jurisdiction of the school district to which the charter petition is submitted. —California Education Code Section 47605(b)(5)(G)

All races and ethnicities are welcome at every EFC school. EFC continues to reflect the ethnic and racial make-up of the original Cox Elementary School population. EFC's program is attempting to reverse the pattern of low socio economic and high ethnically diverse populations underperforming in school. As such, Cox has instituted a recruitment program designed to educate and inform potential students about its instructional program and seek to identify and recruit students who traditionally have been underserved and/or have underperformed in traditional elementary school environments.

The recruitment program includes, but is not necessarily limited to:

- The development of promotional material, such as brochures and banners;
- Visits to, community centers, and park and recreation facilities when appropriate events are held;
- Attendance and participation at local neighborhood events to promote the school and meet prospective students;
- Develop partnerships with local racial and ethnic community organizations as a source of referrals for prospective students;
- Organizing open house and school tour visits to offer opportunities for prospective students and families to learn more about the school program;
- Utilization of teachers and staff to develop a teacher referral network from other schools for prospective students;

EFC maintains an accurate accounting of the racial and ethnic makeup of the school on an ongoing

## Public School Attendance Alternatives

Governing Law: The public school attendance alternatives for pupils residing within the school district who choose not to attend charter schools. —California Education Code Section 47605(b)(5)(L)

Students of Oakland Unified School District (OUSD) are free to attend the existing OUSD schools with available spaces rather than Education for Change at Cox Elementary. Alternatively, students may wish to seek inter- or intradistrict attendance alternatives in accordance with OUSD policy. Parents/guardians will be informed that no student shall be granted an automatic right to enrollment in any school or program of OUSD on the basis of that student's enrollment or application to the Charter School.

## Suspension/Expulsion Procedures

Governing Law: The procedures by which pupils can be suspended or expelled. —California Education Code Section 47605(b)(5)(J)

Education for Change at Cox Elementary believes that positive behavior leads to success. At EFC we believe in the 6 Ps of a quality education experience: be prompt, be polite, be proud, be productive, be prepared, and be positive. The Cox staff regularly discusses these characteristics with the students and reward positive behavior that represents:

**The 6 Ps**

- *Be Prompt*
- *Be Polite*
- *Be Proud*
- *Be Productive*
- *Be Prepared*
- *Be Positive*

**Code of Conduct**

The goal of the Cox Code of Conduct is to create conditions that foster student self-discipline in a warm, supportive school climate that is conducive to maximum learning for all students. The Code of Conduct is a general guide for behavior, not a mechanism for rigid control. The individual personalities of students or extenuating circumstances will be considered before corrective measures are prescribed. (*Reference Ed Code Sections 48900 and 48915 and Health and Safety Code 11007*)

The code of conduct is presented in the student/parent handbook. Every family receives a new copy of the student/parent handbook annually.

Each student and his or her parent or guardian will be provided with a copy of the following discipline policies including suspension and expulsion and will be required to verify that they have reviewed and understand the policies prior to enrollment.

Suspension and Expulsion

The following Pupil Suspension and Expulsion Policy has been established in order to promote learning and protect the safety and well being of all students at Cox Elementary Charter School (the "Charter School"). When the policy is violated, it may be necessary to suspend or expel a student from regular classroom instruction. This policy shall serve as Charter School's policy and procedures for student suspension and expulsion, and it may be amended from time to time without the need to amend the charter so long as the amendments comport with legal requirements.

Staff shall enforce disciplinary rules and procedures fairly and consistently among all students. This Policy and its Procedures will clearly describe discipline expectations, and it will be printed and distributed as part of the Student Handbook which is sent to each student at the beginning of the school year. The Charter School administration shall ensure that students and their parents/guardians are notified in writing upon enrollment of all discipline policies and procedures.

Discipline includes but is not limited to advising and counseling students, conferring with parents/guardians, detention during and after school hours, use of alternative educational environments, suspension and expulsion.

Corporal punishment shall not be used as a disciplinary measure against any student. Corporal punishment includes the willful infliction of or willfully causing the infliction of physical pain on a student. For purposes of the Policy, corporal punishment does not include an employee's use of force that is reasonable and necessary to protect the employee, students, staff or other persons or to prevent damage to school property.

Suspended or expelled students shall be excluded from all school and school-related activities unless otherwise agreed during the period of suspension or expulsion.

A student identified as an individual with disabilities or for whom Charter School has a basis of knowledge of a suspected disability pursuant to the Individuals with Disabilities Education Improvement Act of 2004 ("IDEIA") or who is qualified for services under Section 504 of the Rehabilitation Act of 1973 ("Section 504") is subject to the same grounds for suspension and expulsion and is accorded the same due process procedures applicable to regular education students except when federal and state law mandates additional or different procedures. Charter School will follow all applicable federal and state laws when imposing any form of discipline on a student identified as an individual with disabilities or for whom Charter School has a basis of knowledge of a suspected disability or who is otherwise qualified for such services or protections in according due process to such students.

## A. Grounds for Suspension and Expulsion of Students

A student may be suspended or expelled for prohibited misconduct if the act is 1) related to school activity, 2) school attendance occurring at Charter School or at any other school, or 3) a Charter School sponsored event. A Pupil may be suspended or expelled for acts that are enumerated below and related to school activity or attendance that occur at any time, including, but not limited to, and of the following:

a) while on school grounds;
b) while going to or coming from school;
c) during the lunch period, whether on or off the school campus; or
d) during, going to, or coming from a school-sponsored activity.

## B. Suspension Offenses

1. Discretionary Suspension Offenses. Students may be suspended for any of the following acts when it is determined the pupil:

1. Caused, attempted to cause, or threatened to cause physical injury to another person.

2. Willfully used force of violence upon the person of another, except self-defense.

3. Unlawfully possessed, used, sold or otherwise furnished, or was under the influence of any controlled substance, as defined in Health and Safety Code 11053-11058, alcoholic beverage, or intoxicant of any kind.

4. Unlawfully offered, arranged, or negotiated to sell any controlled substance as defined in Health and Safety Code 11053-11058, alcoholic beverage or intoxicant of any kind, and then sold, delivered or otherwise furnished to any person another liquid substance or material and represented same as controlled substance, alcoholic beverage or intoxicant.

5. Committed or attempted to commit robbery or extortion.

6. Caused or attempted to cause damage to school property or private property.

7. Stole or attempted to steal school property or private property.

8. Possessed or used tobacco or products containing tobacco or nicotine products, including but not limited to cigars, cigarettes, miniature cigars, clove cigarettes,

smokeless tobacco, snuff, chew packets and betel. This section does not prohibit the use of his or her own prescription products by a pupil.

9. Committed an obscene act or engaged in habitual profanity or vulgarity.

10. Unlawfully possessed or unlawfully offered, arranged, or negotiated to sell any drug paraphernalia, as defined in Health and Safety Code 11014.5.

11. Disrupted school activities or otherwise willfully defied the valid authority of supervisors, teachers, administrators, other school officials, or other school personnel engaged in the performance of their duties.

12. Knowingly received stolen school property or private property.

13. Possessed an imitation firearm, i.e.: a replica of a firearm that is so substantially similar in physical properties to an existing firearm as to lead a reasonable person to conclude that the replica is a firearm.

14. Committed or attempted to commit a sexual assault as defined in Penal code 261, 266c, 286, 288, 288a or 289, or committed a sexual battery as defined in Penal Code 243.4.

15. Harassed, threatened, or intimidated a student who is a complaining witness or witness in a school disciplinary proceeding for the purpose of preventing that student from being a witness and/or retaliating against that student for being a witness.

16. Unlawfully offered, arranged to sell, negotiated to sell, or sold the prescription drug Soma.

17. Engaged in, or attempted to engage in hazing. For the purposes of this subdivision, "hazing" means a method of initiation or preinitiation into a pupil organization or body, whether or not the organization or body is officially recognized by an educational institution, which is likely to cause serious bodily injury or personal degradation or disgrace resulting in physical or mental harm to a former, current, or prospective pupil. For purposes of this section, "hazing" does not include athletic events or school-sanctioned events.

18. Made terrorist threats against school officials and/or school property. For purposes of this section, "terroristic threat" shall include any statement, whether written or oral, by a person who willfully threatens to commit a crime which will result in death, great bodily injury to another person, or property damage in excess of one thousand dollars ($1,000), with the specific intent that the statement is to be taken as a threat, even if there is no intent of actually carrying it out, which, on its face and under the circumstances in which it is made, is so unequivocal, unconditional, immediate, and specific as to convey to the person threatened, a gravity of purpose

and an immediate prospect of execution of the threat, and thereby causes that person reasonably to be in sustained fear for his or her own safety or for his or her immediate family's safety, or for the protection of school property, or the personal property of the person threatened or his or her immediate family.

19. Committed sexual harassment, as defined in Education Code Section 212.5. For the purposes of this section, the conduct described in Section 212.5 must be considered by a reasonable person of the same gender as the victim to be sufficiently severe or pervasive to have a negative impact upon the individual's academic performance or to create an intimidating, hostile, or offensive educational environment. This section shall apply to pupils in any of grades 4 to 12, inclusive.

20. Caused, attempted to cause, threaten to cause or participated in an act of hate violence, as defined in subdivision (e) of Section 233 of the Education Code. This section shall apply to pupils in any of grades 4 to 12, inclusive.

21. Intentionally harassed, threatened or intimidated a student or group of students to the extent of having the actual and reasonably expected effect of materially disrupting class work, creating substantial disorder and invading student rights by creating an intimidating or hostile educational environment. This section shall apply to pupils in any of grades 4 to 12, inclusive.

22. Engaged in an act of bullying, including, but not limited to, bullying committed by means of an electronic act, as defined in subdivisions (f) and (g) of Section 32261 of the Education Code , directed specifically toward a pupil or school personnel.

23. A pupil who aids or abets, as defined in Section 31 of the Penal Code, the infliction or attempted infliction of physical injury to another person may be subject to suspension, but not expulsion, except that a pupil who has been adjudged by a juvenile court to have committed, as an aider and abettor, a crime of physical violence in which the victim suffered great bodily injury or serious bodily injury shall be subject to discipline pursuant to subdivision (1).

2. Non- Discretionary Suspension Offenses: Students must be suspended and recommended for expulsion for any of the following acts when it is determined the pupil:

a) Possessed, sold, or otherwise furnished any firearm, knife, explosive, or other dangerous object unless, in the case of possession of any object of this type, the students had obtained written permission to possess the item from a certificated school employee, with the Principal or designee's concurrence.

## C. Suspension Procedure

Suspensions shall be initiated according to the following procedures:

1. Conference

Suspension shall be preceded, if possible, by a conference conducted by the Principal or the Principal's designee with the student and his or her parent and, whenever practical, the teacher, supervisor or school employee who referred the student to the Principal. The conference may be omitted if the Principal or designee determines that an emergency situation exists. An "emergency situation" involves a clear and present danger to the lives, safety or health of students or school personnel. If a student is suspended without this conference, both the parent/guardian and student shall be notified of the student's right to return to school for the purpose of a conference.

At the conference, the pupil shall be informed of the reason for the disciplinary action and the evidence against him or her and shall be given the opportunity to present his or her version and evidence in his or her defense.

This conference shall be held within two school days, unless the pupil waives this right or is physically unable to attend for any reason including, but not limited to, incarceration or hospitalization.

No penalties may be imposed on a pupil for failure of the pupil's parent or guardian to attend a conference with school officials. Reinstatement of the suspended pupil shall not be contingent upon attendance by the pupil's parent or guardian at the conference.

2. Notice to Parents/Guardians

At the time of suspension, the Principal or designee shall make a reasonable effort to contact the parent/guardian by telephone or in person. Whenever a student is suspended, the parent/guardian shall be notified in writing of the suspension and the date of return following suspension. This notice shall state the specific offense committed by the student. In addition, the notice may also state the date and time when the student may return to school. If school officials wish to ask the parent/guardian to confer regarding matters pertinent to the suspension, the notice may request that the parent/guardian respond to such requests without delay.

3. Suspension Time Limits/Recommendation for Expulsion

Suspensions, when not including a recommendation for expulsion, shall not exceed five (5) consecutive school days per suspension.

Upon a recommendation of Expulsion by the Principal or Principal's designee, the pupil and the pupil's guardian or representative will be invited to a conference to determine if the suspension for the pupil should be extended pending an expulsion hearing. This determination will be made by the Principal or designee upon either of the following determinations: 1) the pupil's presence will be disruptive to the

education process; or 2) the pupil poses a threat or danger to others. Upon either determination, the pupil's suspension will be extended pending the results of an expulsion hearing.

**D. Expellable Offenses**

1. Discretionary Expellable Offenses: Students may be expelled for any of the following acts when it is determined the pupil:

a) Caused, attempted to cause, or threatened to cause physical injury to another person.

b) Willfully used force of violence upon the person of another, except self-defense.

c) Unlawfully possessed, used, sold or otherwise furnished, or was under the influence of any controlled substance, as defined in Health and Safety Code 11053-11058, alcoholic beverage, or intoxicant of any kind.

d) Unlawfully offered, arranged, or negotiated to sell any controlled substance as defined in Health and Safety Code 11053-11058, alcoholic beverage or intoxicant of any kind, and then sold, delivered or otherwise furnished to any person another liquid substance or material and represented same as controlled substance, alcoholic beverage or intoxicant.

e) Committed or attempted to commit robbery or extortion.

f) Caused or attempted to cause damage to school property or private property.

g) Stole or attempted to steal school property or private property.

h) Possessed or used tobacco or products containing tobacco or nicotine products, including but not limited to cigars, cigarettes, miniature cigars, clove cigarettes, smokeless tobacco, snuff, chew packets and betel. This section does not prohibit the use of his or her own prescription products by a pupil.

i) Committed an obscene act or engaged in habitual profanity or vulgarity.

j) Unlawfully possessed or unlawfully offered, arranged, or negotiated to sell any drug paraphernalia, as defined in Health and Safety Code 11014.5.

k) Disrupted school activities or otherwise willfully defied the valid authority of supervisors, teachers, administrators, other school officials, or other school personnel engaged in the performance of their duties.

l) Knowingly received stolen school property or private property.

m) Possessed an imitation firearm, i.e.: a replica of a firearm that is so substantially similar in physical properties to an existing firearm as to lead a reasonable person to conclude that the replica is a firearm.

n) Committed or attempted to commit a sexual assault as defined in Penal code 261, 266c, 286, 288, 288a or 289, or committed a sexual battery as defined in Penal Code 243.4.

o) Harassed, threatened, or intimidated a student who is a complaining witness or witness in a school disciplinary proceeding for the purpose of preventing that student from being a witness and/or retaliating against that student for being a witness.

p) Unlawfully offered, arranged to sell, negotiated to sell, or sold the prescription drug Soma.

q) Engaged in, or attempted to engage in hazing. For the purposes of this subdivision, "hazing" means a method of initiation or preinitiation into a pupil organization or body, whether or not the organization or body is officially recognized by an educational institution, which is likely to cause serious bodily injury or personal degradation or disgrace resulting in physical or mental harm to a former, current, or prospective pupil. For purposes of this section, "hazing" does not include athletic events or school-sanctioned events.

r) Made terrorist threats against school officials and/or school property. For purposes of this section, "terroristic threat" shall include any statement, whether written or oral, by a person who willfully threatens to commit a crime which will result in death, great bodily injury to another person, or property damage in excess of one thousand dollars ($1,000), with the specific intent that the statement is to be taken as a threat, even if there is no intent of actually carrying it out, which, on its face and under the circumstances in which it is made, is so unequivocal, unconditional, immediate, and specific as to convey to the person threatened, a gravity of purpose and an immediate prospect of execution of the threat, and thereby causes that person reasonably to be in sustained fear for his or her own safety or for his or her immediate family's safety, or for the protection of school property, or the personal property of the person threatened or his or her immediate family.

s) Committed sexual harassment, as defined in Education Code Section 212.5. For the purposes of this section, the conduct described in Section 212.5 must be considered by a reasonable person of the same gender as the victim to be sufficiently severe or pervasive to have a negative impact upon the individual's academic performance or to create an intimidating, hostile, or offensive educational environment. This section shall apply to pupils in any of grades 4 to 12, inclusive.

t) Caused, attempted to cause, threaten to cause or participated in an act of hate violence, as defined in subdivision (e) of Section 233 of the Education Code. This section shall apply to pupils in any of grades 4 to 12, inclusive.

u) Intentionally harassed, threatened or intimidated a student or group of students to the extent of having the actual and reasonably expected effect of materially disrupting class work, creating substantial disorder and invading student rights by creating an intimidating or hostile educational environment. This section shall apply to pupils in any of grades 4 to 12, inclusive.

v) Engaged in an act of bullying, including, but not limited to, bullying committed by means of an electronic act, as defined in subdivisions (f) and (g) of Section 32261 of the Education Code , directed specifically toward a pupil or school personnel.

w) A pupil who aids or abets, as defined in Section 31 of the Penal Code, the infliction or attempted infliction of physical injury to another person may be subject to suspension, but not expulsion, except that a pupil who has been adjudged by a juvenile court to have committed, as an aider and abettor, a crime of physical violence in which the victim suffered great bodily injury or serious bodily injury shall be subject to discipline pursuant to subdivision (1).

2. Non -Discretionary Expellable Offenses: Students must be expelled for any of the following acts when it is determined pursuant to the procedures below that the pupil:

a) Possessed, sold, or otherwise furnished any firearm, knife, explosive, or other dangerous object unless, in the case of possession of any object of this type, the students had obtained written permission to possess the item from a certificated school employee, with the Principal or designee's concurrence.

If it is determined by the Governing Board that a student has brought a fire arm or destructive device, as defined in Section 921 of Title 18 of the United States Code, on to campus or to have possessed a firearm or dangerous device on campus, the student shall be expelled for one year, pursuant to the Federal Gun Free Schools Act of 1994.

The term "firearm" means (A) any weapon (including a starter gun) which will or is designed to or may readily be converted to expel a projectile by the action of an explosive; (B) the frame or receiver of any such weapon; (C) any firearm muffler or firearm silencer; or (D) any destructive device. Such term does not include an antique firearm.

The term "destructive device" means (A) any explosive, incendiary, or poison gas,

including but not limited to: (i) bomb, (ii) grenade, (iii) rocket having a propellant charge of more than four ounces, (iv) missile having an explosive or incendiary charge of more than one-quarter ounce, (v) mine, or (vi) device similar to any of the devices described in the preceding clauses.

**E. Authority to Expel**

A student may be expelled either by the Board following a hearing before it or by the Board upon the recommendation of an Administrative Panel to be assigned by the Board as needed. The Administrative Panel should consist of at least three members who are certificated and neither a teacher of the pupil or a Board member of the EFC's governing board. The Administrative Panel may recommend expulsion of any student found to have committed an expellable offense.

**F. Expulsion Procedures**

Students recommended for expulsion are entitled to a hearing to determine whether the student should be expelled. Unless postponed for good cause, the hearing shall be held within thirty (30) school days after the Principal or designee determines that the Pupil has committed an expellable offense.

In the event an administrative panel hears the case, it will make a recommendation to the Board for a final decision whether to expel. The hearing shall be held in closed session unless the pupil makes a written request for a public hearing three (3) days prior to the hearing.

Written notice of the hearing shall be forwarded to the student and the student's parent/guardian at least ten (10) calendar days before the date of the hearing. Upon mailing the notice, it shall be deemed served upon the pupil. The notice shall include:

1. The date and place of the expulsion hearing;

2. A statement of the specific facts, charges and offenses upon which the proposed expulsion is based;

3. A copy of the School's disciplinary rules which relate to the alleged violation;

4. Notification of the student's or parent/guardian's obligation to provide information about the student's status at the school to any other school district or school to which the student seeks enrollment;

5. The opportunity for the student or the student's parent/guardian to appear in person or to employ and be represented by counsel or a non-attorney advisor;

6. The right to inspect and obtain copies of all documents to be used at the hearing;

7. The opportunity to confront and question all witnesses who testify at the hearing;

8. The opportunity to question all evidence presented and to present oral and documentary evidence on the student's behalf including witnesses.

## G. Special Procedures for Expulsion Hearings Involving Sexual Assault or Battery Offenses

The School may, upon a finding of good cause, determine that the disclosure of either the identity of the witness or the testimony of that witness at the hearing, or both, would subject the witness to an unreasonable risk of psychological or physical harm. Upon this determination, the testimony of the witness may be presented at the hearing in the form of sworn declarations which shall be examined only by the School, Panel Chair or the hearing officer in the expulsion. Copies of these sworn declarations, edited to delete the name and identity of the witness, shall be made available to the pupil.

1. The complaining witness in any sexual assault or battery case must be provided with a copy of the applicable disciplinary rules and advised of his/her right to (a) receive five days notice of his/her scheduled testimony, (b) have up to two (2) adult support persons of his/her choosing present in the hearing at the time he/she testifies, which may include a parent, guardian, or legal counsel, and (c) elect to have the hearing closed while testifying.

2. The School must also provide the victim a room separate from the hearing room for the complaining witness' use prior to and during breaks in testimony.

3. At the discretion of the person or panel conducting the hearing, the complaining witness shall be allowed periods of relief from examination and cross-examination during which he or she may leave the hearing room.

4. The person conducting the expulsion hearing may also arrange the seating within the hearing room to facilitate a less intimidating environment for the complaining witness.

5. The person conducting the expulsion hearing may also limit time for taking the testimony of the complaining witness to the hours he/she is normally in school, if there is no good cause to take the testimony during other hours.

6. Prior to a complaining witness testifying, the support persons must be admonished that the hearing is confidential. Nothing in the law precludes the person presiding over the hearing from removing a support person whom the presiding person finds is disrupting the hearing. The person conducting the hearing may permit any one of the support persons for the complaining witness to accompany him or her to the witness stand.

7. If one or both of the support persons is also a witness, the School must present evidence that the witness' presence is both desired by the witness and will be helpful to the School. The person presiding over the hearing shall permit the witness to stay unless it is established that there is a substantial risk that the testimony of the complaining witness would be influenced by the support person, in which case the presiding official shall admonish the support person or persons not to prompt, sway, or influence the witness in any way. Nothing shall preclude the presiding officer from exercising his or her discretion to remove a person from the hearing whom he or she believes is prompting, swaying, or influencing the witness.

8. The testimony of the support person shall be presented before the testimony of the complaining witness and the complaining witness shall be excluded from the courtroom during that testimony.

9. Especially for charges involving sexual assault or battery, if the hearing is to be conducted in the public at the request of the pupil being expelled, the complaining witness shall have the right to have his/her testimony heard in a closed session when testifying at a public meeting would threaten serious psychological harm to the complaining witness and there are no alternative procedures to avoid the threatened harm. The alternative procedures may include videotaped depositions or contemporaneous examination in another place communicated to the hearing room by means of closed-circuit television.

10. Evidence of specific instances of a complaining witness' prior sexual conduct is presumed inadmissible and shall not be heard absent a determination by the person conducting the hearing that extraordinary circumstances exist requiring the evidence be heard. Before such a determination regarding extraordinary circumstance can be made, the witness shall be provided notice and an opportunity to present opposition to the introduction of the evidence. In the hearing on the admissibility of the evidence, the complaining witness shall be entitled to be represented by a parent, legal counsel, or other support person. Reputation or opinion evidence regarding the sexual behavior of the complaining witness is not admissible for any purpose.

## H. Students With Disabilities

A pupil identified as an individual with disabilities or for whom the Charter School has a basis of knowledge of a suspected disability pursuant to the Individuals with Disabilities Education Improvement Act ("IDEIA") or who is qualified for services under Section 504 of the Rehabilitation Act of 1973 ("Section 504") is subject to the same grounds for disciplinary action, including suspension and expulsion, and is accorded the same due process procedures applicable to regular education pupils except when federal and state law mandates additional or different procedures. the Charter School will follow the IDEIA, Section 504, and all applicable federal and state laws when imposing any form of discipline on a pupil identified as an individual with disabilities or for whom the Charter School

has a basis of knowledge of a suspected disability or who is otherwise qualified for such services or protections in according due process to such pupils. The following procedures shall be followed when a student with a disability is considered for suspension or expulsion. These procedures will be updated if there is a change in the law.

1. NOTIFICATION OF DISTRICT

The Charter School shall immediately notify the District and coordinate the procedures in this policy with the District the discipline of any student with a disability or student who the Charter School or District would be deemed to have knowledge that the student had a disability.

2. SERVICES DURING SUSPENSION

Students suspended for more than ten (10) school days in a school year shall continue to receive services so as to enable the student to continue to participate in the general education curriculum, although in another setting, and to progress toward meeting the goals set out in the child's IEP; and receive, as appropriate, a functional behavioral assessment or functional analysis, and behavioral intervention services and modifications, that are designed to address the behavior violation so that it does not recur. These services may be provided in an interim alterative educational setting.

3. PROCEDURAL SAFEGUARDS/MANIFESTATION DETERMINATION

Within ten (10) school days of a recommendation for expulsion or any decision to change the placement of a child with a disability because of a violation of a code of student conduct, the Charter School, the parent, and relevant members of the IEP Team shall review all relevant information in the student's file, including the child's IEP, any teacher observations, and any relevant information provided by the parents to determine:

a) If the conduct in question was caused by, or had a direct and substantial relationship to, the child's disability; or

b) If the conduct in question was the direct result of the local educational agency's failure to implement the IEP.

If the Charter School, the parent, and relevant members of the IEP Team determine that either of the above is applicable for the child, the conduct shall be determined to be a manifestation of the child's disability.

If the Charter School, the parent, and relevant members of the IEP Team make the determination that the conduct was a manifestation of the child's disability, the IEP Team shall:

1. Conduct a functional behavioral assessment or a functional analysis assessment, and implement a behavioral intervention plan for such child,

provided that the Charter School had not conducted such assessment prior to such determination before the behavior that resulted in a change in placement;

2. If a behavioral intervention plan has been developed, review the behavioral intervention plan if the child already has such a behavioral intervention plan, and modify it, as necessary, to address the behavior; and

3. Return the child to the placement from which the child was removed, unless the parent and the Charter School agree to a change of placement as part of the modification of the behavioral intervention plan.

If the Charter School, the parent, and relevant members of the IEP team determine that the behavior was not a manifestation of the student's disability and that the conduct in question was not a result of the failure to implement the IEP, then the Charter School may apply the relevant disciplinary procedures to children with disabilities in the same manner and for the same duration as the procedures would be applied to students without disabilities.

## 4. DUE PROCESS APPEALS

The parent of a child with a disability who disagrees with any decision regarding placement, or the manifestation determination, or the Charter School believes that maintaining the current placement of the child is substantially likely to result in injury to the child or to others, may request an expedited administrative hearing through the Special Education Unit of the Office of Administrative Hearings.

When an appeal relating to the placement of the student or the manifestation determination has been requested by either the parent or the Charter school, the student shall remain in the interim alternative educational setting pending the decision of the hearing officer or until the expiration of the forty-five (45) day time period provided for in an interim alternative educational setting, whichever occurs first, unless the parent and the Charter School agree otherwise.

## 5. SPECIAL CIRCUMSTANCES

Charter School personnel may consider any unique circumstances on a case-by-case basis when determining whether to order a change in placement for a child with a disability who violates a code of student conduct.

The Principal or designee may remove a student to an interim alternative educational setting for not more than forty-five (45) days without regard to whether the behavior is determined to be a manifestation of the student's disability in cases where a student:

1. Carries or possesses a weapon, as defined in 18 USC 930, to or at school, on school premises, or to or at a school function;

2. Knowingly possesses or uses illegal drugs, or sells or solicits the sale of a controlled substance, while at school, on school premises, or at a school function; or

3. Has inflicted serious bodily injury, as defined by 20 USC 1415(k)(7)(D), upon a person while at school, on school premises, or at a school function.

## 6. INTERIM ALTERNATIVE EDUCATIONAL SETTING

The student's interim alternative educational setting shall be determined by the student's IEP team.

## 7. PROCEDURES FOR STUDENTS NOT YET ELIGIBLE FOR SPECIAL EDUCATION SERVICES

A student who has not been identified as an individual with disabilities pursuant to IDEIA and who has violated the district's disciplinary procedures may assert the procedural safeguards granted under this administrative regulation only if the Charter School had knowledge that the student was disabled before the behavior occurred.

The Charter School shall be deemed to have knowledge that the student had a disability if one of the following conditions exists:

1. The parent/guardian has expressed concern in writing, or orally if the parent/guardian does not know how to write or has a disability that prevents a written statement, to Charter School supervisory or administrative personnel, or to one of the child's teachers, that the student is in need of special education or related services.

2. The parent has requested an evaluation of the child.

3. The child's teacher, or other Charter School personnel, has expressed specific concerns about a pattern of behavior demonstrated by the child, directly to the director of special education or to other Charter School supervisory personnel.

If the Charter School knew or should have known the student had a disability under any of the three (3) circumstances described above, the student may assert any of the protections available to IDEIA-eligible children with disabilities, including the right to stay-put.

If the Charter School had no basis for knowledge of the student's disability, it shall proceed with the proposed discipline. The Charter School shall conduct an expedited

evaluation if requested by the parents; however the student shall remain in the education placement determined by the Charter School pending the results of the evaluation.

The Charter School shall not be deemed to have knowledge of that the student had a disability if the parent has not allowed an evaluation, refused services, or if the student has been evaluated and determined to not be eligible.

## I. Record of Hearing

A record of the hearing shall be made and may be maintained by any means, including electronic recording, as long as a reasonably accurate and complete written transcription of the proceedings can be made.

## J. Presentation of Evidence

While technical rules of evidence do not apply to expulsion hearings, evidence may be admitted and used as proof only if it is the kind of evidence on which reasonable persons can rely in the conduct of serious affairs. A recommendation by the Administrative Panel to expel must be supported by substantial evidence that the student committed an expellable offense.

Findings of fact shall be based solely on the evidence at the hearing. While hearsay evidence is admissible, no decision to expel shall be based solely on hearsay. Sworn declarations may be admitted as testimony from witnesses of whom the Board, Panel or designee determines that disclosure of their identity or testimony at the hearing may subject them to an unreasonable risk of physical or psychological harm.

If, due to a written request by the expelled pupil, the hearing is held at a public meeting, and the charge is committing or attempting to commit a sexual assault or committing a sexual battery as defined in Education Code Section 48900, a complaining witness shall have the right to have his or her testimony heard in a session closed to the public.

The decision of the Administrative Panel shall be in the form of written findings of fact and a written recommendation to the Board who will make a final determination regarding the expulsion. The final decision by the Board shall be made within ten (10) school days following the conclusion of the hearing. The Decision of the Board is final.

If the expulsion hearing panel decides not to recommend expulsion, the pupil shall immediately be returned to his/her educational program.

## K. Written Notice to Expel

The Principal or designee following a decision of the Board to expel shall send written notice of the decision to expel, including the Board's adopted findings of fact, to the student or parent/guardian. This notice shall also include the following:

1. Notice of the specific offense committed by the student

2. Notice of the student's or parent/guardian's obligation to inform any new district in which the student seeks to enroll of the student's status with the School.

The Principal or designee shall send a copy of the written notice of the decision to expel to the County.

This notice shall include the following:

a) The student's name
b) The specific expellable offense committed by the student

The Board's decision to expel shall be final.

**L. Disciplinary Records**

The School shall maintain records of all student suspensions and expulsions at the School. Such records shall be made available to the County upon request.

**M. Expelled Pupils/Alternative Education**

*Pupils who are expelled shall be responsible for seeking alternative education programs including, but not limited to, programs within the County or their school district of residence.*

**N. Rehabilitation Plans**

Students who are expelled from the School shall be given a rehabilitation plan upon expulsion as developed by the Board at the time of the expulsion order, which may include, but is not limited to, periodic review as well as assessment at the time of review for readmission. The rehabilitation plan should include a date not later than one year from the date of expulsion when the pupil may reapply to the School for readmission.

**O. Readmission**

The decision to readmit a pupil or to admit a previously expelled pupil from another school district or charter school shall be in the sole discretion of the Board following a meeting with the Principal and the pupil and guardian or representative to determine whether the pupil has successfully completed the rehabilitation plan and to determine whether the pupil poses a threat to others or will be disruptive to the school environment. The Principal shall make a recommendation to the Board following the meeting regarding his or her determination. The pupil's readmission is also contingent upon the School's capacity at the time the student seeks readmission.

# FINANCIAL PLANNING, REPORTING, AND ACCOUNTABILITY

Governing Law: The petitioner or petitioners shall also be required to provide financial statements that include a proposed first year operational budget, including startup costs, and cash flow and financial projections for the first three years of operation. —California Education Code Section 47605(g)

**Budgets**

Preliminary estimated budgets for the next five years and one year of cash flow for Education for Change at Cox Elementary are attached as appendix # 6.

**Financial Reporting**

The Chief Operating Officer in collaboration with the principal of Education for Change at Cox Elementary in coordination with the CEO of EFC submits an annual budget to the EFC Board of Directors during the spring of each year. The EFC annual fiscal period runs from July 1 through June 30.

In order to ensure the necessary oversight and review of mandated reports for which the authorizer must determine fiscal health and sustainability, the following schedule of reporting deadline to the District will apply each year of the term of this charter;

- September 1 – Final Unaudited Financial Report for Prior Year
- December 1 – Final Audited Financial Report for Prior Year
- December 1 – First Interim Financial Report for Current Year
- March 1 – Second Interim Financial Report for Current Year
- June 15 – Preliminary Budget for Subsequent Year

EFC has developed financial planning, financial reporting systems and budgets. The school principal and Chief Operating Officer in conjunction with appropriate EFC staff is responsible for producing monthly financial reports and designing a policy of internal controls to ensure fiscal responsibility. The principal, EFC staff, and the EFC Board has also developed other policies and procedures including employee benefits, compensation, evaluations, dispute resolution, disciplinary actions, student information systems, and parental involvement.

Financial records will be regularly maintained and a financial report prepared for every meeting of the EFC Board of Directors.

EFC has established strict policies governing internal controls. These policies ensure that the internal control mechanisms address legal compliance, conflicts of interest, signature authorities, government access to records, accounting procedures, cash management, and budget development, financial reporting, property management and procurement.

## ATTENDANCE ACCOUNTING

The school maintains contemporaneous documentation of attendance in a format acceptable to the State. Required reports regarding daily attendance will be completed and submitted to the requesting agencies.

## BUDGET ALLOCATION AND VENDOR SELECTION

The EFC Board is responsible for approving annual budgets, with substantial input from the Chief Operating Officer (COO) and the principal. The COO and principal develop the budget proposals and have latitude in determining how funds are best used within budget categories. EFC may delegate authority to the principal to select vendors below a contract amount to be determined, but retains overall responsibility for contract approvals. EFC has created an economy of scale by creating a highly accountable internally staffed back office business service department.

## POTENTIAL USERS OF FINANCIAL INFORMATION

Financial statements such as a Balance Sheet, Income Statement, and Statement of Cash Flow are prepared by the Home Office. Financial statements are used by the independent auditors who the EFC Board hires each year. The financial statements are also available for review as desired by any of the school's officers, managers, or Board members who want to assess the school's financial condition. In addition, Board members use the financial statements to confirm existing policies or to create new policies. Finally, EFC submits its annual audited financial statement to the appropriate authorities within the California Department of Education, State Controller's Office, Alameda County Superintendent of Schools, and OUSD as described above.

**Insurance**
EFC maintains general liability, workers compensation, and other necessary insurance coverage as required by OUSD.

# Administrative Services

Governing Law: The manner in which administrative services of the School are to be provided.
—California Education Code Section 47605(g)

With the exception of services performed by OUSD in providing supervisorial oversight to EFC as defined by Education Code Section 47604.32, all charter-requested services from OUSD are likely to be on a fee-for-service basis. Mutually agreed-upon fees must be in place prior to the charter-requested service. EFC will establish a competitive bid process balancing quality and price to outsource many of the services not retained from OUSD.

EFC may contract with the district for some of its administrative services. The EFC staff will cooperate fully with OUSD staff in the preparation and reporting of all required data and financial information. The district and the charter school may enter negotiations to provide services to the

charter school. Such services will be mutually agreed upon. Neither party is obligated to provide or accept such services, but may do so by mutual agreement. The Superintendent of OUSD or the designee of the district is authorized to negotiate and enter into an agreement to provide services to the charter school.

In accordance with Education Code 47613, the chartering agency may charge for the actual costs of supervisory oversight of the EFC Charter School pursuant to 47604.32 not to exceed 1 percent of the revenue of the charter school. For purposes of this charter, "revenue of the charter school" means the general purpose entitlement and categorical block grant, as defined in subdivisions (a) and (b) of Section 47632. The services described above are additional services outside the definition of supervisory oversight.

Subject to availability and agreement of OUSD, EFC may request OUSD services on a fee-for-service basis, including, but are not limited to:

- Student health and human services (including access to school mental health and suicide prevention services, support from crisis team, and access to audiology services).
- Fingerprinting and criminal record processing.
- Processing of emergency credentials.
- Bilingual fluency testing.
- Non-stock requisition processing.
- Rubbish disposal.
- District purchasing contracts.
- Environmental health / safety consultation.
- Field trip transportation.
- School mail.
- Student information system.
- Food services.

## Facilities

Governing Law: The description of facilities to be used by the charter school shall specify where the school intends to locate. —California Education Code Section 47605(g)

The Education for Change at Cox Elementary will occupy the same facility that Cox Elementary occupied prior to charter status at 9860 Sunnyside Street, Oakland, CA 94603.

Education for Change at Cox Elementary shall occupy facilities that comply with the Asbestos requirement as cited in the Asbestos Hazard Emergency Response Act (AHERA), 40CFR part 763. AHERA requires that any building leased or acquired that is to be used as a school or administrative building shall maintain an asbestos management plan.

If Education for Change at Cox Elementary fails to submit a certificate of occupancy or other valid documentation to the District verifying that the intended facility in which the school will operate complies with Education Code Section 47610, not less than 30 days before the school is scheduled to begin operation pursuant to the first year of this renewal term, it may not commence operations unless an exception is made by the Office of Charter Schools and/or the local planning department or equivalent agency. If Education for Change at Cox Elementary moves or expands to another facility during the term of this charter, Education for Change at Cox Elementary shall provide a certificate of occupancy or other valid documentation to the District verifying that the intended facility in which the school will operate complies with Education Code Section 47610, to the District for each facility at least 30 days before school is scheduled to begin operations in the facility or facilities. Education for Change at Cox Elementary shall not begin operation in any location for which it has failed to timely provide a certificate of occupancy to the District, unless an exception is made by the Office of Charter Schools and/or the local planning department or equivalent agency.

Notwithstanding any language to the contrary in this charter, the interpretation, application, and enforcement of this provision are not subject to the Dispute Resolution Process.

### Transportation

Except as may be required by an individualized education program (IEP) under the IDEA, EFC will not be responsible for the transportation of pupils to and from school, and it will be responsibility of the parent or guardian of the pupil to provide transportation to the school.

## Financial Audit

Governing Law: The manner in which an annual, independent financial audit shall be conducted, which shall employ generally accepted accounting principles, and the manner in which audit exceptions and deficiencies shall be resolved to the satisfaction of the chartering authority. — California Education Code Section 47605(b)(5)(I)

The School facilitates an annual independent audit of the school's financial affairs. The EFC governing board selects and oversees an auditor with education audit experience.

The audit verifies the accuracy of the School's financial statements, attendance and enrollment accounting practices and reviews the school's internal controls. The audit will always be conducted in accordance with generally accepted accounting principles applicable to the school in accordance with the K-12 audit guide as incorporated into the California Code of Regulations. The annual audit will be completed by an independent auditor included on the list of approved educational auditors by the California State Controller within four months of the close of the fiscal year and that a copy of the auditor's findings will be forwarded to OUSD, the Alameda County Superintendent of Schools, the State Controller, and the CDE by December 15 of each year. EFC, the school's principal, and the COO along with an audit committee will review any audit exceptions or deficiencies and report to the EFC Board of Directors with recommendations on how to resolve them. The EFC Board will submit a report to OUSD describing how the exceptions and deficiencies have been or will be resolved to the satisfaction of the District.

To the extent that Education for Change at Cox Elementary is a recipient of federal funds, including federal Title I, Part A funds, Education for Change at Cox Elementary has agreed to meet all of the programmatic, fiscal and other regulatory requirements of the No Child Left Behind Act and other applicable federal grant programs. Education for Change at Cox Elementary agrees that it will keep and make available to the District any documentation necessary to demonstrate compliance with the requirements of the No Child Left Behind Act and other applicable federal programs, including, but not limited to, documentation related to required parental notifications, appropriate credentialing of teaching and paraprofessional staff, where applicable, or any other mandated federal program requirement. The mandated requirements of NCLB include, but are not the limited to, the following:

- Notify parents at the beginning of each school year of their right to know the professional qualifications of their child's classroom teacher including a timely notice to each individual parent that the parent's child has been assigned, or taught for four or more consecutive weeks by, a teacher who is not highly qualified.
- Develop jointly with, and distribute to, parents of participating children, a school-parent compact.
- Hold an annual Title I meeting for parents of participating Title I students.
- Develop jointly with, agree on with, and distribute to, parents of participating children a written parent involvement policy.

Education for Change at Cox Elementary also understands that as part of its oversight of the school, the Office of Charter Schools may conduct program review of federal and state compliance issues.

## School Closure Protocol

Governing Law: A description of the procedures to be used if the charter school closes.
—California Education Code Section 47605(b)(5)(p)

The following are closing procedures that abide by Cal. Ed. Code §47605(b)(5)(P), should the school close for any reason. The decision to close Education for Change at Cox Elementary either by the Education for Change at Cox Elementary Board of Directors or by the OUSD Board will be documented in a closure action. The closure action shall be deemed to have been automatically made when any of the following occurs: the charter is revoked or not renewed by the OUSD Board of Education; the charter school Board votes to close the school; or the charter lapses. In the event of such a closure action, the following steps are to be implemented:

1. Closure of the school will be documented by official action of the EFC Board of Directors. The action will identify the reason for closure. The official action will also identify an entity and person or persons responsible for closure-related activities.

The Charter School Board of Directors will promptly notify parents and students of the Charter School, the District, the County Office of Education, the School's SELPA, the retirement systems in which the School's employees participate (e.g., Public Employees' Retirement System, State Teachers' Retirement System, and federal social security), and the California Department of Education of the closure as well as the effective date of the closure. This notice will also include the name(s) of and contact information for the person(s) to whom reasonable inquiries may be made regarding the closure; the pupils' school districts of residence; and the manner in which parents (guardians) may obtain copies of pupil records, including specific information on completed courses and credits that meet graduation requirements Written notification to parents/guardians/caregivers of the enrolled students of the Education for Change at Cox Elementary will be issued by Education for Change at Cox Elementary within 72 hours after the determination of a closure action. A sample copy of the language used in the written notification is also to be made to OUSD within the same time frame.

a. The written notification will also include information on assistance in transferring each student to another appropriate school, and a process for the transfer of all student records.

b. The process for transferring student records to the receiving schools shall be in accordance with OUSD procedures for students moving from one school to another.

c. Parents/guardians will also be provided with student information that includes closure notice, grade reports, discipline records, immunization records, completed coursework and credits that meet graduation requirements.

The EFC Board will also develop a list of pupils in each grade level and the classes they have completed, together with information on the pupils' districts of residence, which they will provide to the entity responsible for closure-related activities.

2. Written notification to OUSD of the list of returning students and their home schools, to be made within 72 hours of the determination of the closure action.

3. Transfer of student records to the receiving schools, within seven calendar days from the determination of an action to close when parents notify Education for Change at Cox Elementary of the receiving school. Records of students who have not notified Education for Change at Cox Elementary in writing of a receiving school will be sent to the student's school of residence.

All transfers of student records will be made in compliance with the Family Educational Rights and Privacy Act ("FERPA") 20 U.S.C. § 1232g. Education for Change at Cox Elementary will ask the District to store original records of the Education for Change at Cox Elementary students. All records of the Education for Change at Cox Elementary shall be transferred to the District upon closure if the District agrees. If the District will not or cannot store the records, Education for Change at Cox Elementary shall work with the County Office of Education to determine a suitable alternative location for storage.

All state assessment results, special education records, and personnel records will be transferred and maintained in accordance with applicable law.

4. Written notification to the California Department of Education and the Los Angeles County Office of Education of the closure action shall be made by the Education for Change at Cox Elementary by registered mail within 72 hours of the decision to Closure Action.

5. The Education for Change at Cox Elementary shall allow OUSD access, inspection and copying of all school records, including financial and attendance records, upon written request by OUSD.

6. A financial closeout audit of the school will be paid for by the Education for Change at Cox Elementary to determine the disposition of all assets and liabilities of the charter school, including plans for disposing of any net assets. The final independent audit shall be completed within six months after the closure of the school. This audit will be conducted by a neutral, independent licensed CPA who will employ generally accepted accounting principles. The final audit will include an accounting of all financial assets, including cash and accounts receivable and an inventory of property, equipment, and other items of material value, an accounting of the liabilities, including accounts payable and any reduction in apportionments as a result of audit findings or other investigations, loans, and unpaid staff compensation, and an assessment of the disposition of any restricted funds received by or due to the charter school.

Any liability or debt incurred by Education for Change at Cox Elementary will be the responsibility of the Education for Change at Cox Elementary and not OUSD. Education for Change at Cox Elementary understands and acknowledges that the Charter School will cover the

outstanding debts or liabilities of Cox Elementary Charter School. On closure of the school, all assets of the school, including but not limited to all leaseholds, personal property, intellectual property and all ADA apportionments and other revenues generated by students attending the school, remain the sole property of Education for Change at Cox Elementary and shall be distributed in accordance with the Articles of Incorporation upon the dissolution of the nonprofit public benefit corporation. Any assets acquired from the District or District property will be promptly returned upon closure to the District. The distribution shall include return of any grant funds and restricted categorical funds to their source in accordance with the terms of the grant or state and federal law, as appropriate, which may include submission of final expenditure reports for entitlement grants and the filing of any required Final Expenditure Reports and Final Performance Reports, as well as the return of any donated materials and property in accordance with any conditions established when the donation of such materials or property was accepted.

As Education for Change at Cox Elementary is operated by a nonprofit public benefit corporation, should the corporation dissolve with the closure of Education for Change at Cox Elementary, the Board will follow the procedures set forth in the California Corporations Code for the dissolution of a nonprofit public benefit corporation and file all necessary filings with the appropriate state and federal agencies.

As specified by the Budget, Education for Change at Cox Elementary will utilize the reserve fund to undertake any expenses associated with the closure procedures identified above.

Education for Change at Cox Elementary understands and acknowledges that only unrestricted funds will be used to pay creditors. Any unused AB 602 funds will be returned to the District SELPA, and other categorical funds will be returned to the source of funds.

7. For six calendar months from the closure action or until budget allows, whichever comes first, sufficient staff as deemed appropriate by the Education for Change at Cox Elementary Board will maintain employment to take care of all necessary tasks and procedures required for a smooth closing of the school and student transfers.

8. The Education for Change at Cox Elementary Board shall adopt a plan for windup of the school and, if necessary, the corporation, in accordance with the requirements of the Corporations Code.

9. In addition to a final audit, Education for Change at Cox Elementary will also submit any required year-end financial reports to the California Department of Education and OUSD, in the form and time frame required.

10. If the charter school is a nonprofit corporation, the corporation does not have any other functions than operation of the charter school, the corporation will determine whether it should be dissolved according to its bylaws.

a. The corporation's bylaws will address how assets are to be distributed at the closure of the corporation.

This Element 16 shall survive the revocation, expiration, termination, or cancellation of this charter or any other act or event that would end Education for Change at Cox Elementary's right to operate as a charter school or cause Education for Change at Cox Elementary to cease operation. Education for Change at Cox Elementary and District agree that, due to the nature of the property and activities that are the subject of this petition, the District and public shall suffer irreparable harm should charter school breach any obligation under this Element 16. The District, therefore, shall have the right to seek equitable relief to enforce any right arising under this Element 16 or any provision of this Element 16 or to prevent or cure any breach of any obligation undertaken, without in any way prejudicing any other legal remedy available to the District. Such legal relief shall include, without limitation, the seeking of a temporary or permanent injunction, restraining order, or order for specific performance, and may be sought in any appropriate court.

## IMPACT ON THE CHARTER AUTHORIZER

Governing Law: The governing board of a school district shall require that the petitioner or petitioners provide information regarding the proposed operation and potential effects of the school, including, but not limited to, the facilities to be utilized by the school, the manner in which administrative services of the school are to be provided, and potential civil liability effects, if any, upon the school and upon the school district. (Education Code Section 47605(g)).

Education for Change at Cox Elementary agrees to permit the district to inspect and receive copies of all records relating to the operation of the school, including financial, personnel, and pupil records. EFC shall promptly comply with all such reasonable written requests. The records of the School are public records under shall comply with the California Public Records Act.

The Charter School shall be operated by a California nonprofit public benefit corporation. This corporation is organized and operated exclusively for charitable purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code and California Revenue and Taxation Code Section 23701d.

Pursuant to Education Code Section 47604(c), an entity that grants a charter to a charter school operated by or as a nonprofit public benefit corporation shall not be liable for the debts or obligations of the charter school or for claims arising from the performance of acts, errors or omissions by the Charter School if the authority has complied with all oversight responsibilities required by law. The Charter School shall work diligently to assist the District in meeting any and all oversight obligations under the law, including monthly meetings, reporting, or other District-requested protocol to ensure the District shall not be liable for the operation of the Charter School.

The corporate bylaws of the Charter School shall provide for indemnification of the School's Board, officers, agents, and employees, and the Charter School will purchase general liability insurance, Board Members and Officer's insurance, and fidelity bonding to secure against financial risks. Insurance amounts are determined by recommendation of the Charter School's insurance company for schools of similar size, location, and student population. The District shall be named an additional insured on the general liability insurance of the Charter School.

The Charter School Board will institute appropriate risk management practices as discussed herein, including screening of employees, establishing codes of conduct for students, and dispute resolution.

## MISCELLANEOUS PROVISIONS

**Term of Charter**
The term of this charter shall be for five years beginning July 1, 2010, and expiring on June 30, 2015. Education for Change will comply with all processes and timelines set forth by the Oakland Unified School District for charter renewal.

Education for Change at Cox Elementary must submit its renewal petition to the Office of Charter Schools no earlier than 270 days before the charter is due to expire unless otherwise agreed by the Office of Charter Schools.

The District may revoke the charter of Education for Change at Cox Elementary in accordance with Education Code Section 47607.any successor provisions to section 47607, or other statutory provisions, if enacted after the date of the charter, regarding the revocation of charters.

**Severability**
The terms of this charter are severable. If, for any reason, any provision hereof shall be determined to be invalid or unenforceable, the validity and effect of the other provisions hereof shall not be affected thereby.

**Amendments**
This petition may be altered, amended, changed, or modified only by agreement in writing executed by EFC. and the Administrator of the Oakland Unified School District. Material revisions and amendments will be made pursuant to the standards, criteria, and timelines in California as described in Education Code Section 47607.

**Force Majeure**
Neither party shall be liable if the performance of any part or all of this charter petition is prevented, delayed, hindered or otherwise made impracticable or impossible by reason of any strike, flood, riot, fire, explosion, earthquake, act of terror, act of God, sabotage, accident or any other casualty beyond either party's control, and which cannot be overcome by reasonable diligence and without unusual expense.

**Notices**
All notices required or permitted by this petition shall be in writing and shall be either hand delivered, sent by facsimile, sent by US mail, postage prepaid, addresses as set forth on the signature page hereof. A notice shall be effective either when personally delivered, on the date set forth on the receipt of a facsimile, or upon the earlier of the date set forth on the receipt of registered or certified mail or on the fifth day after mailing.

To Charter School:

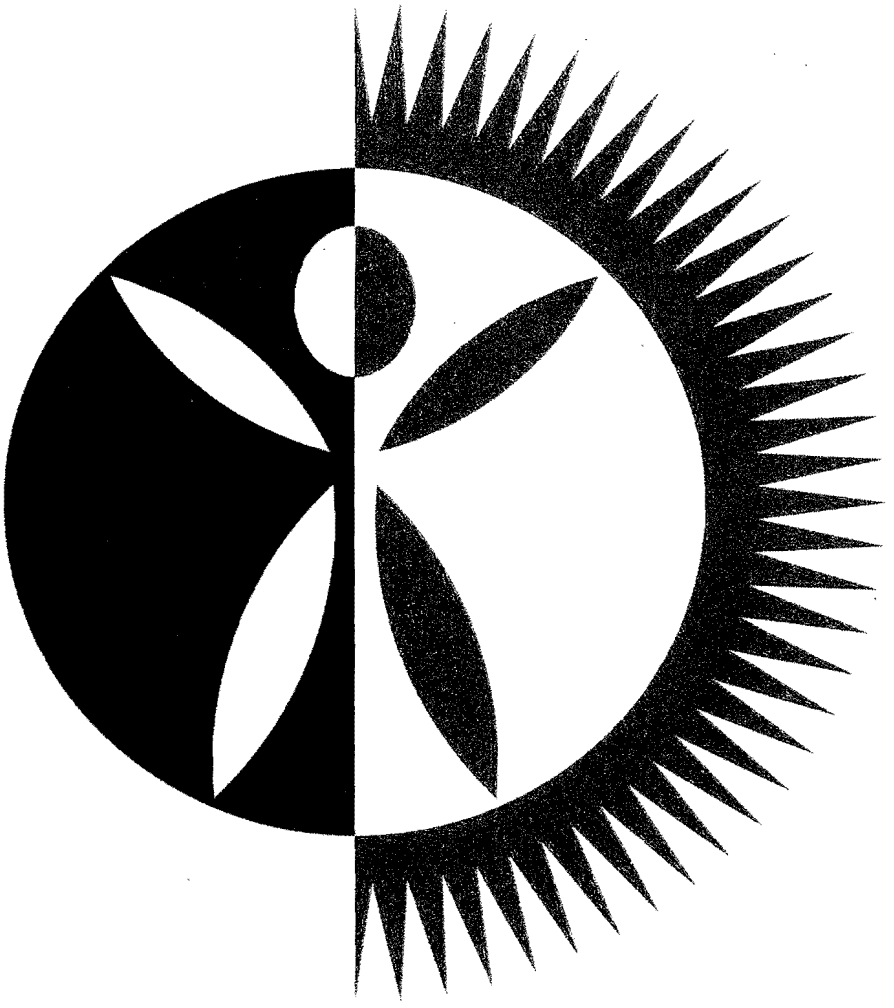
Education for Change
303 Hegenberger Rd, Ste 301
Oakland, CA 94621

To District:

Oakland Unified School District
1025 Second Avenue
Oakland, CA 94606-2212

Education for Change at Cox Elementary Renewal Charter Appendices

1. Renewal Performance Report
2. Articles of Incorporation and Bylaws
3. Organizational chart
4. Teacher Evaluation Forms
5. Other Evaluation Forms
6. Budget and Cash Flow
    a. Budget Narrative
7. Additional Job Essentials
8. 2009-2010 Board Meeting Calendar
9. Board Resumes
10. Board Minutes
11. Staff Handbook
12. Student-Parent Handbook
13. EFC's 6 Principles
14. Student Report Card
15. Parent Leadership Council Matrix
16. Sample Pacing Guides
    a. ELA/Math
    b. Writing
17. Routine Booklet
18. Staff and Parent Surveys
19. Text Analysis Documents
    a. Overview
    b. Text Analysis
20. Standards Connections
    a. Social Science and Science Plan
    b. Sample Grade Level Plans
21. Rubrics
    a. Writing
    b. Student Friendly Writing Rubric
    c. Listening and Speaking
    d. Prosody
    e. Inquiry
    f. Social Skills
    g. Strategy
22. Classified Letter of Support
23. Instructional Mitigations Planning Process



# Education *for* Change

## Charter Renewal Performance Report For Education for Change at Cox Elementary

Submitted to OUSD
December 16, 2009

## STUDENT ENROLLMENT & DEMOGRAPHIC INFORMATION

1. **Provide data on the number of applications annually received per grade and the number of students per grade on the waiting list for school years 2005-2006 to 2008-2009, see Table I below.**

TABLE I LOTTERY : COX

| School | Campus | Date of Lottery | Grades of Applicants | Number of Applicants (per grade) | Number of Slots Available (per grade) | Number of students on waiting list (per grade) |
|---|---|---|---|---|---|---|
| ***Cox*** | | *(Nov)* **2009** | K | 96 | 100 | 0 |
| | | | 1st | 1 | 80 | 1 |
| | | | 2nd | 4 | 100 | 0 |
| | | | 3rd | 3 | 100 | 0 |
| | | | 4th | 2 | 96 | 0 |
| | | | 5th | 5 | 96 | 0 |

| School | Campus | Date of Lottery | Grades of Applicants | Number of Applicants (per grade) | Number of Slots Available (per grade) | Number of students on waiting list (per grade) |
|---|---|---|---|---|---|---|
| ***Cox*** | | *(Nov)* **2008** | K | 89 | 80 | 9 |
| | | | 1st | 11 | 100 | 0 |
| | | | 2nd | 21 | 100 | 0 |
| | | | 3rd | 18 | 100 | 0 |
| | | | 4th | 25 | 96 | 0 |
| | | | 5th | 26 | 128 | 0 |

| School | Campus | Date of Lottery | Grades of Applicants | Number of Applicants (per grade) | Number of Slots Available (per grade) | Number of students on waiting list (per grade) |
|---|---|---|---|---|---|---|
| ***Cox*** | | *(Nov)* **2007** | K | 90 | 120 | 10 |
| | | | 1st | 16 | 100 | 0 |
| | | | 2nd | 18 | 80 | 0 |
| | | | 3rd | 24 | 100 | 0 |
| | | | 4th | 35 | 128 | 1 |
| | | | 5th | 39 | 96 | 0 |

| School | Campus | Date of Lottery | Grades of Applicants | Number of Applicants (per grade) | Number of Slots Available (per grade) | Number of students on waiting list (per grade) |
|---|---|---|---|---|---|---|
| ***Cox*** | | *(Nov)* **2006** | K | 100 | 100 | 0 |
| | | | 1st | 0 | 80 | 0 |

| | | | | | | |
|---|---|---|---|---|---|---|
| | | | 2 | 4 | 100 | 3 |
| | | | 3rd | 11 | 100 | 12 |
| | | | 4th | 2 | 96 | 4 |
| | | | 5th | 15 | 128 | 0 |

2. **Provide a breakdown of your student population including data on student demographics, home languages, students with disabilities, English Language Learners, and homeless students for your charter term (2006-2009). See Table II below.**

TABLE II

SCHOOL DEMOGRAPHIC PROFILE COX

| | School Year | | | |
|---|---|---|---|---|
| Ethnicity/Race | 2006 | 2007 | 2008 | 2009 |
| % White | .30 | 0 | 0 | 0 |
| % Black | 42.80 | 31.70 | 27.72 | 24.35 |
| % Hispanic | 51.30 | 62.58 | 66.30 | 70.01 |
| % Asian / Pacific Islander | 4.90 | 5.72 | 5.79 | 5.64 |
| % Mixed / No Response | .70 | 0 | 0 | 0 |
| % Other | 0 | 1.04 | .18 | 0 |
| Home Languages | | | | |
| % Non-English Speaking Households | 45 | 55 | 67 | 50 |
| Special education | | | | |
| % Students with Disabilities | 5 | 5 | 6 | 5.6 |
| Other | | | | |
| % English Language Learners | 45 | 55 | 67 | 53.7 |
| % Homeless students | 0 | 0 | 0 | 0 |

3. **Describe the admissions and lottery processes. Please explain how you ensure that these processes are aligned with the requirements found in Education Code 47605.**
   - **What procedures are in place for wait-listed students not included in the first round of lottery offers?**
   - **What are the school's procedures for withdrawls and transfers?**

Education for Change at Cox Elementary accepts all students who are residents of the State of California and will not discriminate on the basis of race, ethnicity, gender, religion, national origin, disability, or any other characteristic described in Education Code Section 220. The school is a public elementary school and does not charge tuition. EFC is committed to maintaining a diverse student population, utilizing outreach efforts to recruit students who traditionally have been underserved. No student residing within the boundaries of the Oakland Unified School District shall be required to attend Cox, and alternative school choices are available at other elementary schools within the Oakland Unified School District.

All students who are interested in enrolling at the school are required to complete an application for admission. Applicants must meet the minimum age for public school admission

No specialized admission tests are required; however, tests may be administered to determine the proper placement of students. All students who wish to enroll in the school are enrolled unless the number of applications exceeds the number of seats available. An open enrollment period is held to determine the amount of applications for enrollment.

If the number of admission applications exceeds the enrollment capacity by an enrollment deadline established by the EFC Board, a public random drawing is held. Existing students of Education for Change at Cox Elementary have an automatic right to continued enrollment in the school should they wish to do so and shall not need to be included in the public random drawing. EFC does, however, grant preference in the public random drawing as follows:

1. Siblings of students already attending Cox Elementary;
2. Children of Cox Elementary educators, administration, and staff; and
3. Residents within the Oakland Unified School District.

Any applications not accepted through this public random drawing due to capacity limitations are used to develop a wait list pool of applicants should space become available in the order in which they were drawn. Additional applications are accepted on an ongoing basis and are added to the wait list pool until there is a need for a second lottery when a space becomes available. The wait list does not carry over from one school year to the next.

When students wish to withdrawal or transfer from Education for Change at Cox Elementary, parents are requested to complete and sign a withdrawal form that includes an explanation for withdrawal and the school to which they are transferring or enrolling. Once the form is signed, the school initiates a Notice of Student Disenrollment/ Student Exit form and sends it to the student's district of residence. Cox will provide the district with a copy of the cumulative record of the pupil, including a transcript of grades or report card as well as health information upon receipt of written request.

4. **Describe the strategy and processes that you have put in place to ensure your school enrolls a diverse student population (i.e. representation of English language learners; students with disabilities or of homeless status)?**

EFC's program is attempting to reverse the pattern of low socio economic and high ethnically-diverse populations underperforming in school. As such, Cox has instituted a recruitment program designed to educate and inform potential students about its instructional program. The school also seeks to identify and recruit students who traditionally have been underserved and/or underperformed in traditional elementary school environments.

The recruitment program may include a variety of outreach efforts such as:

- Development of promotional material, such as brochures and banners;
- Visiting community centers, as well as park and recreation facilities when appropriate events are held;

- Attending and participation at local neighborhood events to promote the school and meet prospective students;
- Developing partnerships with local racial and ethnic community organizations as a source of referrals for prospective students;
- Organizing open house and school tour visits to offer opportunities for prospective students and families to learn more about the school program;
- Using teachers and staff to develop a teacher referral network from other schools for prospective students;

EFC maintains an accurate accounting of the racial and ethnic make-up of the school on an on-going basis.

5. **Provide data on the percentage of suspensions and expulsions for the charter term (2006-2009) are presented in Table III.**

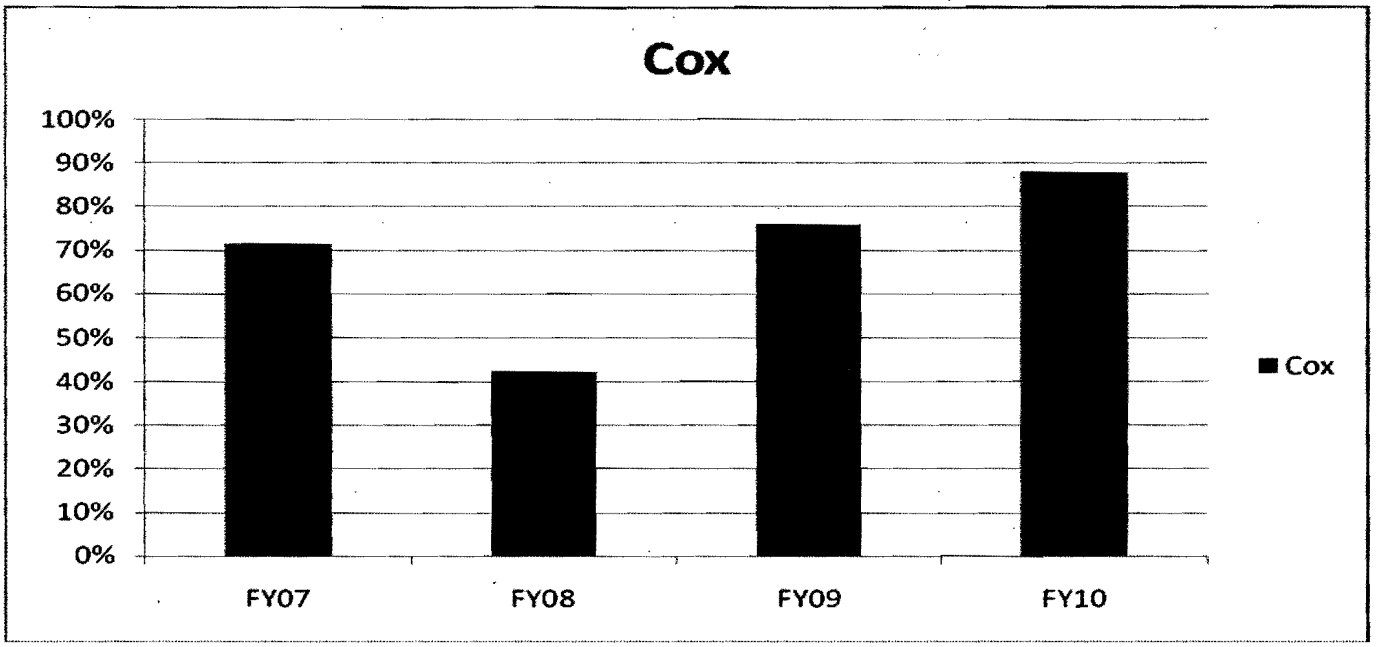
TABLE III
DISCIPLINE

| Charter School | School Year | | | |
|---|---|---|---|---|
| Education for Change at Cox | 2006 | 2007 | 2008 | 2009 |
| **Enrollment** | 879 | 612 | 552 | 535 |
| % Suspensions | 8 | 8.4 | 5.3 | 4.9 |
| % Expulsions | 1 | 0 | 0 | 0 |

6. **If your charter school serves high school students, provide, in table format data**
Not applicable. Cox is an elementary school.

7. **Provide data on the number of teachers hired each year and teacher retention between school years 2006 to 2009.**

| YEAR | Number of Teachers Retained from Previous Year | New Teachers Hired |
|---|---|---|
| 2005-2006 | **n/a** | **29** |
| 2006-2007 | **20** | **8** |
| 2007-2008 | **11** | **15** |
| 2008-2009 | **19** | **6** |
| 2009-2010 | **22** | **3** |




**8. Describe the educational goals established by the charter. How is the school measuring progress towards achieving these goals?**

The following are the newly-established goals in the renewal charter:

- Students will exceed the average performance levels of students in schools with similar demographics in the district in English-Language Arts and Mathematics as measured by the CST.
- Cox will reduce the percent of students who are performing Below Basic and Far Below Basic on the STAR assessments by fifteen percent a year on average over five years.
- Cox will increase the number of students who are performing proficient or advanced on the STAR assessment by thirteen percent a year on average over five years.
- Students will maintain progress toward benchmarks of proficiency in all academic subjects as defined by the California Core Content Standards.
- Students will demonstrate continual improvement on the STAR, including the CST, as well as a minimum of one year's growth on CELDT for each year of instruction.
- The school will meet the API requirements for renewal.
- The school will meet or exceed Adequate Yearly Progress goals.
- Students will be effective and confident communicators, able to write and speak with clarity, accuracy, and precision.
- Students will be critical thinkers and problem solvers.

- At least ninety percent of daily homework will be completed and handed in.
- Student attendance will consistently reach 95 percent.
- Ninety-five percent of parents will grade the school either an A or a B as reported on the annual parent surveys.
- At least ninety percent of the parents will report that they agree or strongly agree that Cox is a safe school environment as reported on the annual parent surveys.

*Progress toward meeting the outcomes in the charter is ongoing throughout the year in all areas.*

Progress toward meeting academic outcomes is monitored through formative and summative assessments. Formative assessments are conducted every six to eight weeks in reading through the Reading Lions open court benchmark assessments. These benchmark assessment results are reviewed in detail by the grade level teams to inform their instruction. The reports show students at or above benchmark in varying areas such as fluency, comprehension and vocabulary etc. Reports also show the percent of students at or above benchmark by class and by strand as well as standard aligned item analysis. Using these detailed reports, teachers make decisions about instruction, re-teaching, and intervention.

Saxon and teacher-made math benchmark assessments provide ongoing data about students' mastery of the standards in math. Math coaches and teachers review assessment results together and make decisions about instruction, paying specific attention to appropriate sub groups.

**Pursuant to paragraph 1 of subdivision (b) [of Education Code § 47607], Education for Change at Cox Elementary shall meet at least *one* of the following criteria prior to receiving a charter renewal:**

1. Attained its Academic Performance Index (API) growth target in the prior year or in two of the last three years, or in the aggregate for the prior three years.
2. Ranked in deciles 4 to 10, inclusive, on the API in the prior year or in two of the last three years.
3. Ranked in deciles 4 to 10, inclusive, on the API for a demographically comparable school in the prior year or in two of the last three years.

**9. Describe how your education program diagnoses and addresses the needs of the following students: English Language Learners, students with disabilities, gifted students, and students in need of remediation.**

*English Language Learners*
Students are given the CELDT within 30 days of enrolling and at least once a year after enrollment if English is not spoken as the primary language in the home as reported on the home language surveys.

Education for Change at Cox Elementary is implementing *Language for Learning, Thinking, Writing* (LFLTW) by McGraw Hill. The school had used Hampton Brown and Santillana, but found the results were not satisfactory. ELs receive daily ELD instruction.

Research demonstrates that ELD instruction should include high levels of oral engagement with multiple opportunities to practice. The LFLTW curriculum emphasizes high levels of student oral participation ensuring all students have ample opportunity to practice both new vocabulary and language structures in an academic context. Grouping students by level of proficiency enhances the effectiveness of the program, maximizing students' development of critical language skills and linking language structures and skills to all core subjects. Systematic and coherent ELD instruction, along with appropriate scaffolding and pre-teaching in the core content areas, is a critical component of the academic success of English Language Learners. ELD instruction is also supported through the Open Court program.

*Student with Disabilities*

An IEP meeting is held within 30 days of enrollment for students who enroll in Education for Change at Cox Elementary who already have an active IEP. Teachers are presented with a copy of the IEP for each student in their classes so that they may track the students' progress toward meeting the IEP goals and to more fully understand the students' areas of need. IEP meetings are held as necessary but no less than once annually. A student's progress toward attainment of IEP goals and objectives are reported as frequently as students who do not have a disability.

If the student is found by a 504 team to have a disability under Section 504, the 504 team and the Director of Site Services shall be responsible for determining what, if any, accommodations or services are needed to ensure that the student receives the free and appropriate public education ("FAPE"). In developing the 504 Plan, the 504 team shall consider all relevant information used during the evaluation of the student, drawing upon a variety of sources, including, but not limited to, assessments conducted by the Education for Change at Cox Elementary professional staff.

*Students Who Need Remediation and Additional Support*

Students who have not been assessed to determine if they qualify for special education services but who are struggling will be supported through a Student Study Team process prior to referring for assessment to determine special education eligibility. A Student Study Team includes the parent, (when appropriate) the student, the teacher, and other school personnel or interested persons, and uses a systematic problem solving approach to assist students with concerns that are interfering with success. The SST clarifies problems and concerns, develops strategies and organizes resources, provides a system for school accountability, and serves to assist and support the teacher and student. An SST is a general education function. All students can benefit from an SST, including but not limited to those students who are repeating a grade level; those who are achieving below grade level; those who are achieving above grade level and require greater challenge; and those who have experienced emotional trauma, behavioral issues, or language issues. Anyone who has a concern for a student can refer that student to a SST for consideration. Anyone who is connected with that student can be included in the SST to provide information to share about the student's strengths, concerns, and strategies that have been used in the past. The SST determines if modifications and accommodations should be made to a student's educational program at Education for Change at Cox Elementary to help the student be more successful. After implementation of a SST plan and follow-up, if the problems or challenges continue, revisions to the plan may be discussed, or if necessary, a referral for special education assessment might be deemed necessary by the SST.

EFC's program, which emphasizes differentiated instruction, focuses on breaking the cycle of underachievement of system-dependent and low achieving students, which make up the vast majority of the school. The elements intended to be most effective for these students are the high expectations of its

coherent curriculum, the extended learning opportunities after school aligned to classroom curriculum, and a teacher corps that utilizes data more intensively and effectively to deliver differentiated instruction.

*Before and After School Intervention Programs*
Intervention focuses on students below grade-level who need support in fluency and reading comprehension as well as in specific mathematics content. Students are chosen by CST data, benchmark data, and teacher recommendation. The benchmark assessment results of students receiving intervention services are monitored to determine student progress and when students are ready to exit the program. Cox is piloting two new intervention and student support strategies this year. The first is a reorganization of the after-school intervention schedule. The first hour will focus on enrichment and the second hour will focus on academic intervention.

The after-school intervention is for students who are performing below basic (BB) or far below basic (FBB) in ELA or math or who are nondecoders. The FBB and BB students receive intervention in reading two days a week in ELA and two days a week in math. Students who are nondecoders receive decoding instruction five days a week until they become proficient decoders. The materials currently in use include SCOE's Non-decoder Intervention Program, SRA Leveled Readers, OCR Intervention Guide and Standards Plus Mathematics.

In addition to daily afterschool interventions through the school year, some students who are severely underachieving may be invited to receive extra support for one week during the summer. EFC uses this time as professional development training for new teachers to work with the students and observe structured intervention lessons.

*Intensive Intervention*
Upper grade students who are reading two or more years below grade level are assessed to determine appropriate placement in the Language! Intervention Program, which provides daily intensive reading intervention. Language! replaces the core reading instruction and is designed to accelerate students to re-enter the core as quickly as possible. This is a comprehensive intervention program that targets the students' specific areas of need to ensure they are addressed as effectively and efficiently as possible. Language! is a state-approved intervention program for both struggling readers and English Language Learners.

*High Achieving Students*
Education for Change at Cox Elementary believes that all children hold gifts and talents that are unique and precious. The students who become high achievers in the Cox program benefit from all the same programmatic structures that allow for differentiation to meet their needs. The curriculum has multiple opportunities for the high achieving students to expand their knowledge and skills through higher level inquiry and small group instruction. As student capabilities expand and the state content standards are met at an ever-increasing rate, the pace of the rigorous curriculum has been accelerated. For instance, students who are reading at an advanced level use the Open Court Classics and expository text for additional theme-related reading and then report out their new understandings about the theme to their classmates. EFC's instructional program supports Literature Circles/ Reading Roundtable where students read and discuss theme-related text at their level, including novels.

## TEACHING AND LEARNING

### Curriculum and Instruction

10. **Describe how the charter school's instructional approach and educational philosophy support the school's mission.**

Education for Change believes good teaching through a coherent, rigorous curriculum with an environment focused on continual improvement and learning leads to high student achievement. Coupled with this approach to academics, EFC schools are populated with students, staff, and families that agree with EFC's mission and come together as a larger community to build and support the elements necessary for all students to succeed. EFC strives to achieve its mission by focusing on the following:

1. **High Quality Teaching.** Every student deserves a high quality teacher in the classroom. EFC expects that teachers are committed to the belief that every student can achieve. EFC expects a commitment on the part of its teachers to continually strive toward high level implementation of the core curriculum and high levels of student engagement. Differentiated instruction and scaffolding so that all students can access the core curriculum are vital components of high quality instruction. Teachers work as a team to analyze assessments and utilize the resulting data systematically to inform instructional practices.

The goal of EFC is to create powerful, collaborative learning communities where high quality instruction is the ultimate goal. Through a practice-based professional development model, data analysis, coaching, cognitive planning and grade level planning, teachers collaborate with their colleagues to share their successes and challenges, to deepen their knowledge of instructional designs, and to continually work toward improving their instruction.

2. **Extended Time for Collaboration and Learning.** All teachers have additional professional development and dedicated collaboration time to improve their instructional practices. Each EFC managed school has an Instructional Leadership Team that guides the work on improving teaching and learning. The Instructional Leadership Team is subdivided into a literacy team and a math team.

EFC students participate in extended learning opportunities that align after school instructional programs with core instructional needs. They encourage students to acquire the academic knowledge and skills as well as broaden extracurricular experiences that will prepare them for middle school and high school.

3. **Coherent, Comprehensive, Rigorous Standards Based Curriculum.** No school succeeds without focus, especially one with educationally-underserved students. EFC implements a core curriculum using Open Court Reading and Saxon Mathematics. Additionally, science and social studies are offered as integrated components of the Open Court curriculum where themes will traverse subject areas. EFC supports this curriculum with supplemental arts through a partnership with the Museum of Children's Art.

4. **Choice & Commitment.** Students, their parents, and the faculty and administration are part of the school by choice. No one is assigned or forced to attend the school. Everyone must make and uphold a commitment to the school and to each other to do what is required to achieve success. While no child is assigned to the school, EFC is deeply committed to serving the children in the neighborhood. Thus, all students who are interested in the school are welcomed, unless the school is at capacity.

5. **Engagement of Community.** EFC is an Oakland-based organization and as such is intent on engaging each school community and collaborating with local partners. Lifelong learners are not just

cultivated within the boundaries of the classroom or solely through the study of the core subjects. Cox sponsors a number of community events to encourage students to interface with the community including Autobiography Day, Expositions of Learning, and events such Back to School Night and Open House.

**11. Provide a chart outlining your school's curriculum for each subject at each grade level.**

| | SUBJECT | CURRICULUM |
|---|---|---|
| K-5 | Math | **Saxon Mathematics**<br>It is the Saxon philosophy that mathematics instruction should build on prior learning. Learning is presented in increments, with sufficient time provided between increments for practice. Mathematics strands are integrated throughout the year rather than taught in insolated units.<br><br>In addition Education For Change supports teachers in enhancing key lessons to ensure all students development the deep conceptual understanding necessary to build a foundation for the future advanced study of mathematics.<br><br>The teachers and Math Coaches at EFC, guided by ACOE Math Coordinators, developed the Pacing Guide for implementation of the Saxon Program (see Appendix 16 for an example). This Pacing Guide focuses on the key standards and big ideas of mathematics. |
| K-5 | English Language Arts/Reading | **Open Court 2002/ Imagine It! (possible next adoption)**<br>Open Court maximizes students' opportunities to become successful readers by providing a balance of systematic direct instruction in sound and word recognition, guided practice, and application of skills with extensive reading of decodable text and authentic literature.<br><br>Through systematic, explicit instruction, Open Court Reading has organized lessons in the most logical and efficient way possible for teaching children to read and write with skill and confidence.<br><br>A committee of teachers and Reading Coaches, using teacher input, have developed EFC's Open Court Pacing Guide (see Appendix 16 for an example)<br><br>*Writing*<br>A committee of teachers and Reading Coaches developed an EFC Writing Pacing Guide based on the Open Court lessons. This Writing Pacing Guide includes greater levels of scaffolding and a deeper implementation of each phase of the writing process (see Appendix 16 for an example). |
| K-5 | Social Science/Science | **Open Court Science and Social Studies Connection**<br>Many of the themes of Open Court are designed to support the development of background knowledge and develop inquiry and research in science and social studies content areas. This helps ensure that students receive a broad based education aligned with the California Content Standards.<br>Teams of teachers and coaches have made significant progress in the development of our Standards Connections document (see Appendix 20) and grade level plans. As part of this process, EFC is incorporating a list of books to be used as read alouds or supplemental student text to enhance OCR and to ensure science and social studies standards are covered.<br>**AIMS and Harcourt integration**<br>Uppergrade ($3^{rd}$- $5^{th}$) students participate in science lessons integrating the AIMS and Harcourt Science curriculum. |
| K-5 | English Language Development | **Language for Learning, Thinking, Writing**<br>The Language for Learning, Thinking, and Writing curriculum is a direct instruction model designed to effectively address the four areas of English Language Development. The curriculum is proficiency based rather than being grade level based. EFC uses the program placement assessments to ensure teachers are addressing student's specific levels of proficiency through departmentalized instruction. |

| | | |
|---|---|---|
| 4-5 | Reading Intervention | **Language!**<br>Language! is an intervention curriculum designed to target students who are reading two or more years below grade level. The curriculum is designed to accelerate the students reading and language skills in the least amount of time possible to return them to the grade level core curriculum.<br>Students are selected based on CST scores, benchmark scores, and teacher referrals. Cox students participate during the core Language Arts block. |

**12. Describe the methods and strategies by which your school assures that students with disabilities are provided a free appropriate public education in the least restrictive environment. Explain how you ensure that all students with disabilities in your school:**

- **Have access to the general education curriculum**
- **Integrate with their non-disabled peers and participate in standardized testing, including the accommodations and modifications which are provided to these students**

Education for Change at Cox Elementary uses a full inclusion model for serving special education students. All students with disabilities participate in the core and noncore classes with their nondisabled peers. This is the least restrictive environment for Cox students. As mentioned earlier, the school uses a Student Study Team process to support students who are struggling, and modifications and accommodations to the students program are made before referring the student for assessment to determine if the student qualifies for special education.

Students with identified learning disabilities are provided after school intervention with their peers to target specific skills in math and reading as well as to participate in a targeted program for students who are nondecoders. The students who qualify for special education receive additional services provided by Oakland Unified School district to support what they are doing in their classes at EFC according to their IEP goals and objectives.

All students are required to participate in standardized testing unless their IEP determines otherwise. Students may receive accommodations or modifications to the testing based on their IEP and allowable accommodations for all students. Samples of some of state approved accommodations and modifications that Cox may utilize are below:

Per CDE guidance, the following may be provided to any student at Education for Change at Cox Elementary (some restrictions apply).

- Test administration directions that are simplified or clarified (does not apply to test questions)
- Allowable marks in test booklet (other than responses) by student including highlighting
- Small group setting for testing
- Extra time on a test within a testing day

Per CDE guidance the following may be provided to all students if they are regularly provided in the regular classroom.

- Individual student testing, provided that a test examiner directly supervises the student
- Visual magnifying equipment
- Audio amplification equipment
- Noise buffers (e.g., individual carrel or study enclosure)

- Special lighting or acoustics; special or adaptive furniture
- Colored overlay, mask, or other means to maintain visual attention
- Manually Coded English or American Sign Language to present directions for administration (does not apply to test questions)

The following accommodations and modifications may only be provided if stipulated in a student's IEP or 504 plan.

- Student marks responses in test booklet and responses are transferred to a scorable answer document by an employee of the school, district, or nonpublic school
- Responses dictated [orally, or in Manually Coded English or American Sign Language] to a scribe for selected-response items (multiple-choice questions)
- Word processing software with spell and grammar check tools turned off for the essay responses (writing portion of the test)
- Essay responses dictated orally or in Manually Coded English to a scribe, audio recorder, or speech-to-text converter and the student provides all spelling and language conventions
- Assistive device that does not interfere with the independent work of the student on the multiple-choice and/or essay responses (writing portion of the test)
- Braille transcriptions provided by the test contractor
- Large-print versions
- Test items enlarged if font larger than required on large-print versions
- Test over more than one day for a test or test part to be administered in a single sitting
- Supervised breaks within a section of the test
- Administration of the test at the most beneficial time of day to the student
- Test administered at home or in hospital by a test examiner
- Dictionary
- Manually Coded English or American Sign Language to present test questions
- Test questions read aloud to student or used audio CD presentation
- Calculator on the mathematics tests
- Calculator on the science tests
- Arithmetic table or formulas (not provided) on the mathematics tests
- Arithmetic table or formulas (not provided) on the science tests
- Math manipulatives on the mathematics tests
- Math manipulatives on the science tests
- Word processing software with spell and grammar check tools enabled on the essay responses writing portion of test

**Ongoing Assessments**

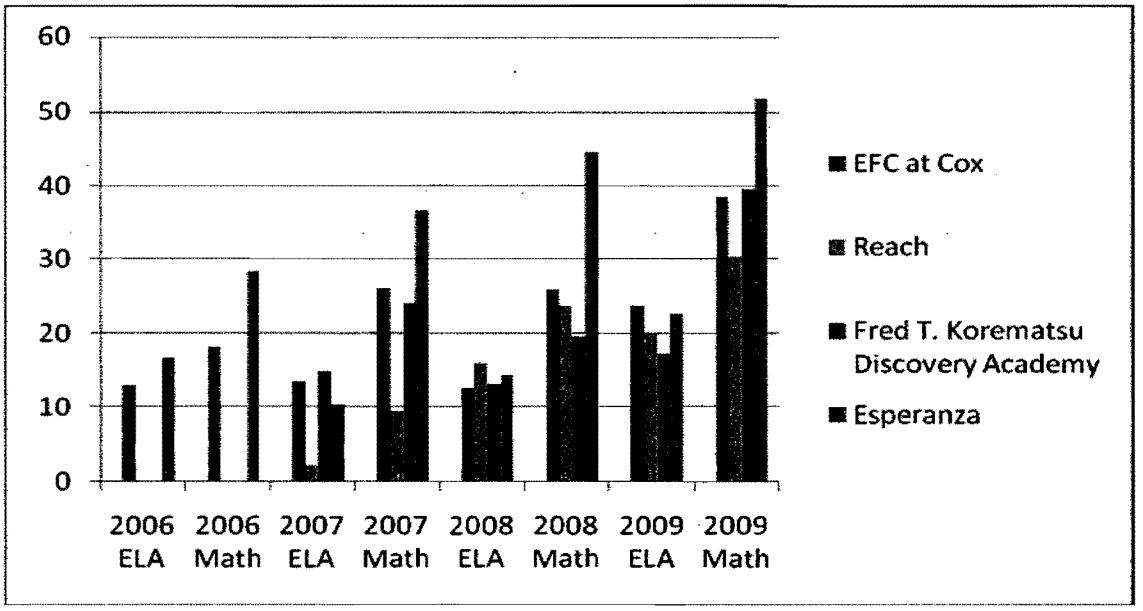
**13. What student performance achievement targets have been established for your students, including those specified in the charter? How has your school performed against these targets? How have subgroups performed?**

The following outlines the **original** Education for Change at Cox Elementary charter petition performance targets and demonstrates the level of performance against these targets, including subgroup information:

- Students will exceed the average performance levels of students in schools with similar demographics in the district in English-Language Arts and Mathematics as measured by the CST

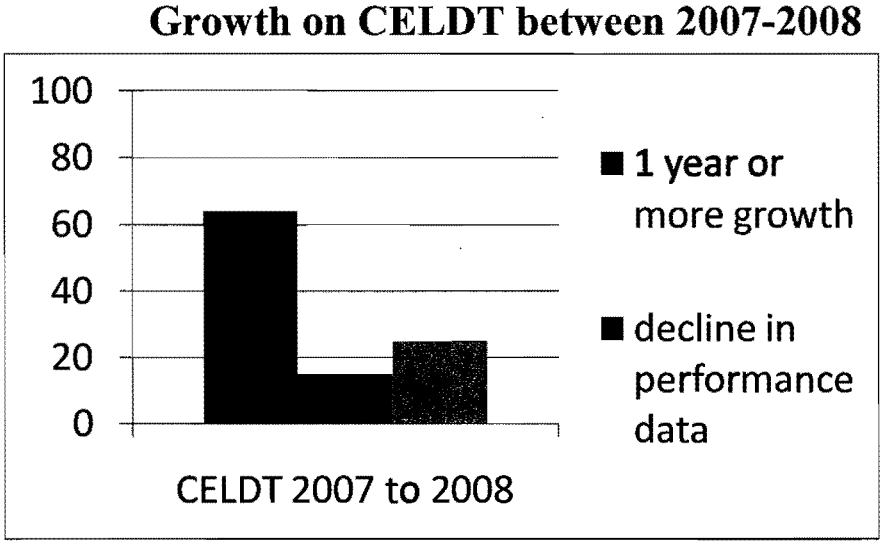
and benchmark assessment scores.

The graph below demonstrates that in the spring of 2009, Education for Change at Cox Elementary outperforms most OUSD schools of similar demographics (as provided to the school by OUSD) and those schools where Cox students would normally attend (as determined by enrollment forms of current students), in English Language Arts and is similar in achievement in math.

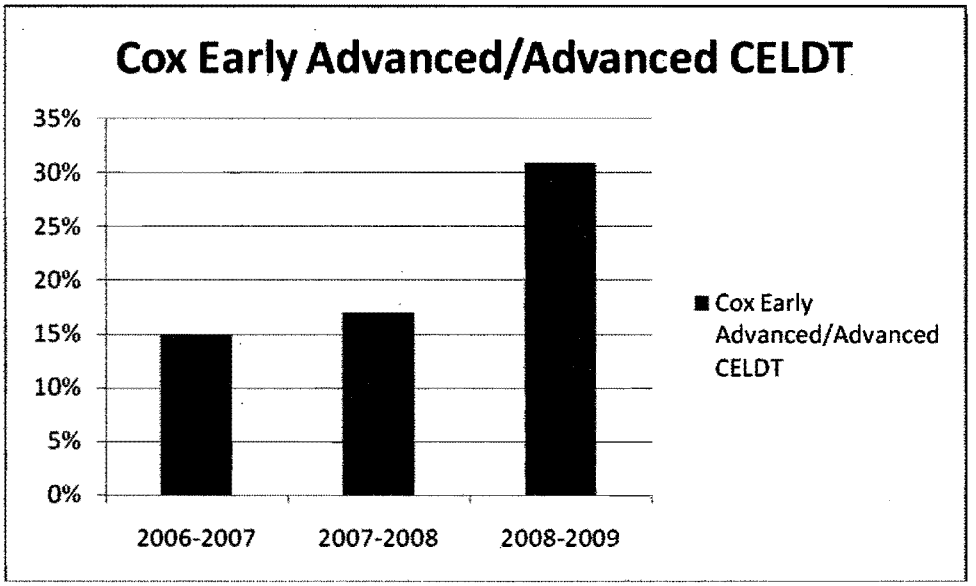



- Students will demonstrate continual improvement on the CST, as well as a minimum of one year's growth each year on the CELDT.

  Sixty-four percent of the English Language Learners at Cox achieved one or more years' growth as measured by the CELDT.

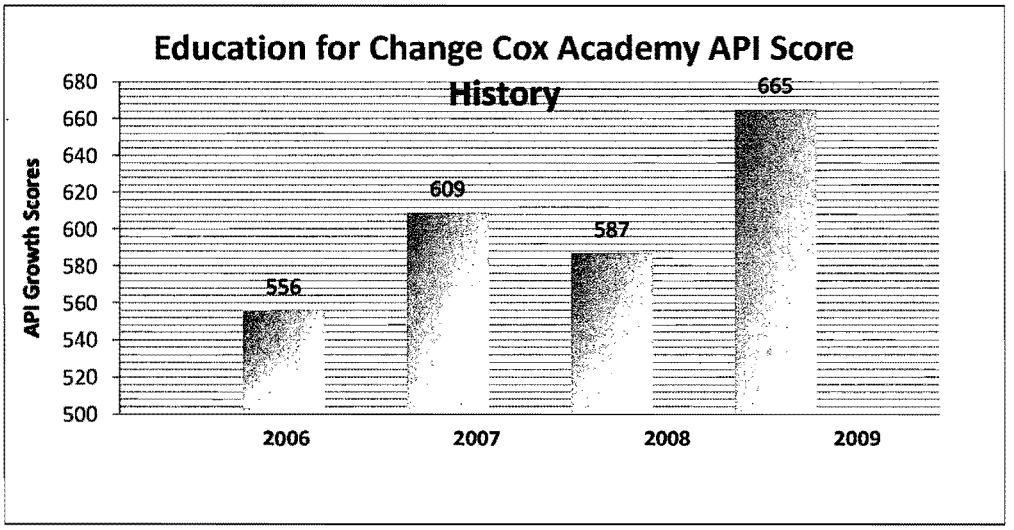


The number of students who improve and become advanced and early advanced has significantly increased over time.




- The school will meet or exceed its annual Academic Performance Index growth target.

While Education for Change at Cox Elementary has not met API targets every year, the school has made an aggregate growth of 109 points in four years.




- The school will meet or exceed Adequate Yearly Progress goals.

The chart below demonstrates:

- In 2006, Education for Change at Cox Elementary did not meet proficiency targets in either math or language arts schoolwide or for significant subgroups.

- In 2007, Education for Change at Cox Elementary made proficiency targets both schoolwide and for all significant subgroups in math but not in language arts.

- In 2008, Education for Change at Cox Elementary did not make proficiency targets in either math or language arts schoolwide or for significant subgroups.

- In 2009, Education for Change at Cox Elementary met proficiency targets for English learners, Hispanic and socioeconomically disadvantaged students. The school did not meet targets for African Americans.

**Meeting or Exceeding AYP Targets: Cox**

| | Participation Rate | Percent Proficient Schoolwide-ELA | Percent Proficient Schoolwide-Math | Significant Subgroups-ELA | Significant subgroups-Math | API |
|---|---|---|---|---|---|---|
| 2006 | yes | no | no | AA-no<br>L-no<br>SD-no<br>EL-no | AA-no<br>L-no<br>SD-no<br>EL-no | no |
| 2007 | yes | no | yes | AA-no<br>L-no<br>SD-no<br>EL-no | AA-yes<br>L-yes<br>SD-yes<br>EL-yes | yes |
| 2008 | yes | no | no | AA-no<br>L-no<br>SD-no<br>EL-no | AA-no<br>L-no<br>SD-no<br>EL-no | no |
| 2009 | yes | yes | yes | AA-no<br>L-yes<br>SD-yes<br>EL-yes | AA-no<br>L-yes<br>SD-yes<br>EL-yes | yes |

Key: AA- African American L- Latino SD- Socioeconomically disadvantaged EL- English Learners

- Student attendance will exceed OUSD's norm.

Education for Change at Cox Elementary attendance rate is now at 95.5 percent, and the OUSD reported rate is 93.79 percent.

- Student and Parent/Guardian school satisfaction surveys will exceed a 3.5 average on a 5-point scale.

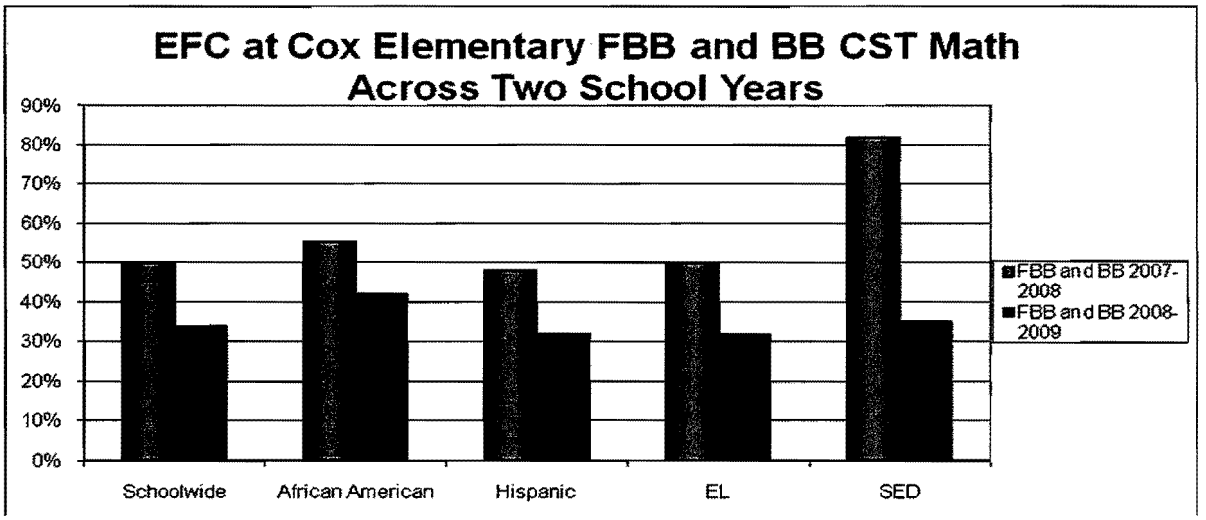
While EFC used a 5 point scale, EFC tracked the satisfaction survey data by percentage at each level of response rather than by an average. Parent survey results show the following:

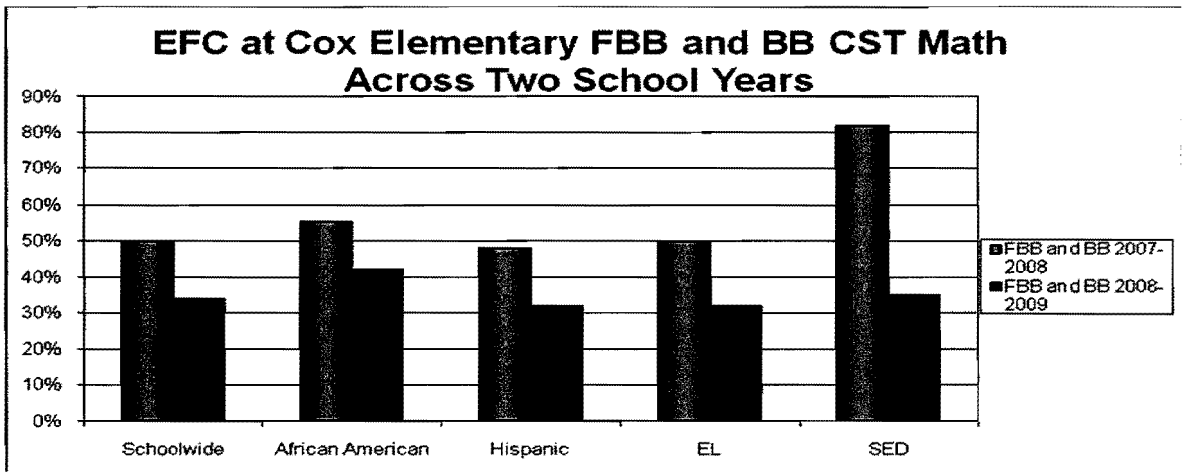
- Ninety-seven percent of parents agreed or strongly agreed that the school was going a good job educating their child,
- Eighty-five percent of the parents agreed or strongly agreed that the school was safe,

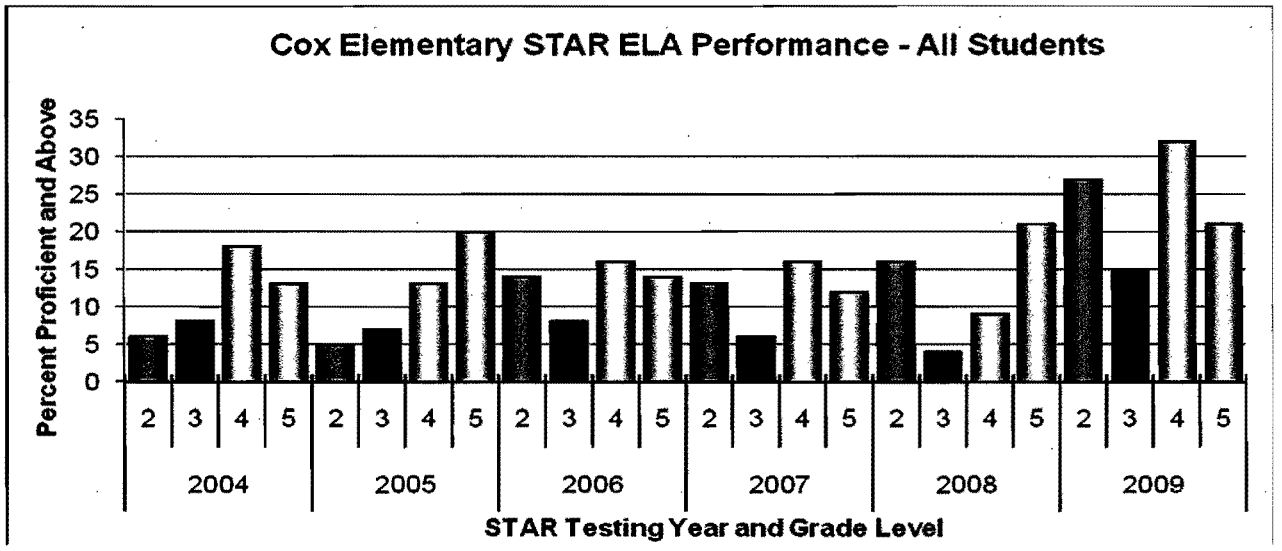
- Ninety-one percent of parents agreed or strongly agreed that they felt welcomed and respected at the school, and
- Ninety-seven percent of parents surveyed gave the school either an A or a B for an overall schoolwide grade.

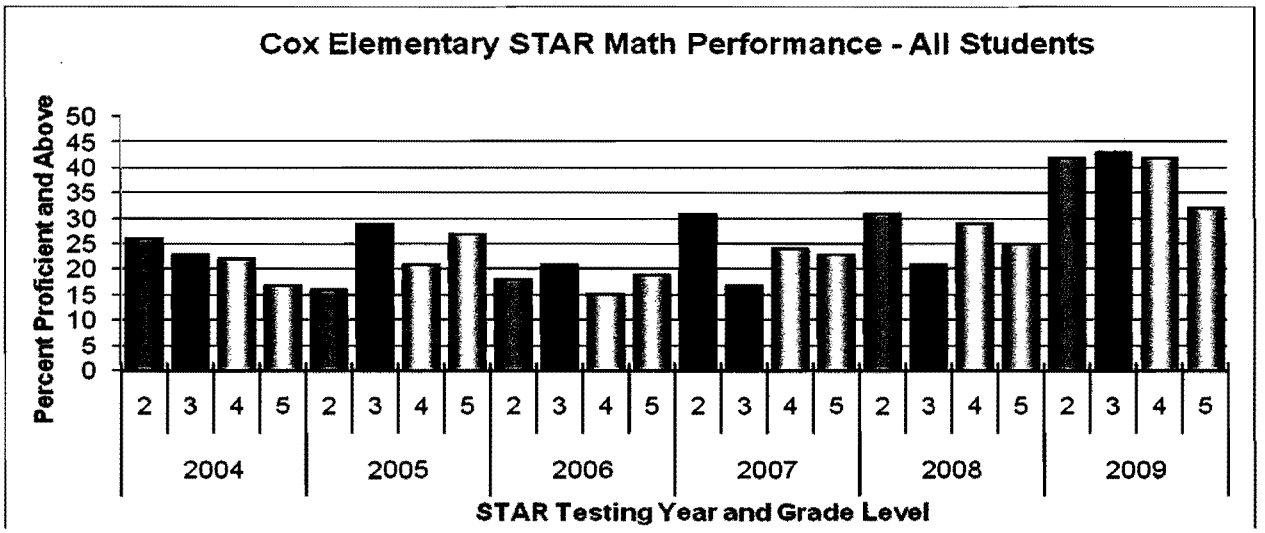
- Students will maintain progress toward benchmarks of proficiency in all academic subjects as defined by the California Core Content Standards.

The following graphs demonstrate that Education for Change at Cox Elementary has consistently decreased the number of students performing far below basic in each significant subgroup and increased the overall number of students performing at proficient and advanced in both math and ELA.




Cox Elementary STAR ELA Performance - All Students
Percent Proficient and Above
35
30
25
20
15
10
5
0
2 3 4 5 2 3 4 5 2 3 4 5 2 3 4 5 2 3 4 5 2 3 4 5
2004
2005
2006
2007
2008
2009
STAR Testing Year and Grade Level


Cox Elementary STAR Math Performance - All Students
Percent Proficient and Above
50
45
40
35
30
25
20
15
10
5
0
2 3 4 5 2 3 4 5 2 3 4 5 2 3 4 5 2 3 4 5 2 3 4 5
2004
2005
2006
2007
2008
2009
STAR Testing Year and Grade Level

**14. What assessments are you using to monitor student learning? How is the school using data from these assessments to make programmatic decisions? How are teachers using assessment information to modify instruction?**

Education for Change at Cox Elementary uses the following forms of assessment to evaluate student performance:

- California Standards Test examining the categories of Far Below Basic, Below Basic, Basic, Proficient, and Advanced as compared to similar schools
- Reading Lions Open Court Reading and Saxon Math benchmark assessments
- Projects
- Unit tests
- Ongoing teacher assessments
- CELDT assessments
- Writing assessments and rubrics
- Research and inquiry projects

The assessment plan for Education for Change at Cox Elementary is designed to be a tool for external accountability as well as to improve instruction and student achievement. To best assure that the school is measuring what Cox expects students to learn, assignments are aligned with the school's pupil outcomes and curriculum. Assessments are used to meet the following objectives:

1) To help teachers differentiate instruction according to student needs

2) To give parents and students meaningful, useful feedback on student progress

3) To monitor the school's progress in meeting its missions and to revise its activities accordingly

*English Language Arts Assessment:*
Using the Reading Lions Assessments for the Open Court program, students are assessed every six to eight weeks.

The Reading Lions Open Court assessments are designed to help classroom teachers and grade-level teams determine how effective their delivery of instruction is meeting expected student-learning goals in relation to concepts and skills taught. They provide teachers with data related to the academic progress of individual students as well as an entire class. This information is then used to guide and plan instruction for the next unit. Reading Lions Open Court benchmark assessments are also used to place students in before and after school intervention programs.

The areas assessed on the benchmark assessments in each grade level include the following:

Kindergarten: uppercase and lowercase letter recognition, high frequency words, oral blending, segmentation, rhyming, oral blending, phonemes, consonant and vowel sounds, cvc words

First grade: word reading, spelling, writing, fluency, reading comprehension

Second through Fifth Grade: fluency, reading comprehension, vocabulary, spelling, checking skills (grammar), writing

*Math Assessment*

Saxon math is a core math program that includes hands-on activities and problem-solving tasks for all elementary grade levels. Cox students take math tests biweekly. Teachers use the informal data as well as Saxon assessment results to determine the level of proficiency and to inform ongoing instruction. Math assessments are also used to place students in before and after school intervention programs. In the last few years, teachers have also developed their own math assessments with the assistance of ACOE. These Trimester Tests are critical tools in tracking the conceptual development of Cox students. The data are used to analyze both students' strengths and weaknesses and to adjust instruction accordingly.

*Using Data*

The Education for Change at Cox Elementary also has a site literacy team that meets weekly to discuss an action plan for reading and language arts. The team reviews the reading assessment, analyzes what the data shows about instruction and learning, and develops an action plan based on that analysis. A parallel structure exists to support our math program.

In addition to the weekly meetings and grade level meetings, Cox holds a data summit four times a year to review assessment results and to develop site action plans.

EFC fosters a climate of continuous improvement, establishing improvement goals through regular analysis of student data for each student in the core classes of reading and mathematics, based on a review of the California Standards Tests as well as the school's own assessments. The ongoing goal of Cox is to improve performance on the state-mandated standardized tests each year until all students are proficient or advanced in math and English language arts.

The most noteworthy structure for use of data is grade level meetings. Grade level meetings are designed to review data, review instructional practice and share strategies for increasing student performance with grade level colleagues.. Grade level chairpersons organize the meetings. Their role is crucial in the proper analysis of data and in the training of teachers to use the data. Grade Level Chairs are responsible for leading their grade level toward high level implementation of the instructional program using the data. The expectations of grade level chairs are that they will do the following:

- Ensure that GLT meetings are focused on instructional improvement and that non-instructional items (i.e., study tours, procedures for lining up, pencil policies, etc) are dealt with at another time
- Facilitate meetings so they stay on topic and focus on instructional improvement (ex: cognitive planning, practicing teaching techniques, planning unit openers, analyzing data, reading research articles, etc.)
- Seek out support from Coaches for grade level needs (PD, articles, DVDs, peer observations, etc.)
- Ensure that Unit Openers, Wrap Ups and Assessments are planned by the grade level
- Communicate grade level needs (from PD to materials) to principals
- Meet with the Instructional Leadership Team to plan PD and monitor the Literacy Action Plan and Math implementation
- Plan, lead and get the necessary resources and support for Supported Grade Level Meeting and for the Workshop PD
- Support Professional Development (i.e., facilitating) activities
- For those on the Literacy Team:
    - Assist in developing and implementing the Literacy Action Plans (weekly)

    - Participate in virtual learning community
    - Attend monthly Literacy Institutes
- Attend Data Summits
- Share information from Data Summits with grade level teachers

## LEARNING COMMUNITY

15. **What is the mission of your charter school for the renewal period (2010-2015)?**

The mission of Education for Change at Cox Elementary has not changed for the 2010-2015 period.

*Mission*
To provide a superior public education to Oakland's **most underserved children** by creating a **system** of public schools that relentlessly focuses on the **continuous refinement** of **high quality instruction.**

*Vision*
When we succeed in building a high performing system of public schools serving the most underserved students, we will make the changes necessary for success to be replicated across every urban public school.

**Professional Culture:**

**16. List the professional development opportunities you provide to administrators and teachers.**

Professional development opportunities provided to administrators and teachers:

- SB472 English Language Arts Open Court training (5 day training)
- SB472 Saxon Math training (5 day training)
- Kindergarten MoCHA training (5 day training)
- 4 additional days of professional development (past trainings have included: ELD- Language for Learning, Thinking, Writing), Math: Relational Thinking and Enhancements, Teaching Writing, Writing Scoring and Calibration
- Professional Development every Wednesday afternoon. Topics have included:
    - English Language Arts:
        - Introduction to the EFC routines
        - Data Analysis and Instructional Response
        - Text Analysis
        - Fluency
        - Writing
    - Math: Relational Thinking
        - Multiple representations (including bar models and use of number lines)
        - Moving from the concrete to semi-concrete to abstract
        - Decomposition
        - Data Analysis and Mitigations
        - Math Investigations
- BTSA training
- Additional optional training:
    - ACCLAIM Math Institutes
    - CSUEB Mathematics content courses on site at EFC schools and exclusively for EFC
    - Saturday ACCLAIM Math training

Members of the Instructional Leadership Team receive additional professional development including:

- Instructional Leadership Team Training prior to school
- 4 Data Summits a year

- Literacy Institutes- once a month day long training for Literacy Team members, as well as being involved in an inquiry project
- Math Institutes- once a month afternoon training for Math Team members

In addition, Administrators participate in Administrator professional development twice a month. These sessions focus on developing administrators' content and pedagogical knowledge to build their strength as instructional leaders. Professional development also includes co-observations with administrators and Home Office staff to calibrate instructional feedback and to build common expectations.

In addition to the formally-planned professional development trainings, EFC has committed to supporting teachers and improving teaching through coaching.

EFC has the following coaching resources:
Literacy

- Two coaches on staff dedicated to Education for Change at Cox Elementary
- Two coaches on staff dedicated to World Academy and Achieve Academy
- One additional roving coach to strategically support identified priorities
- A coach coordinator to support and monitor the coaches

Mathematics

- One mathematics coordinator on staff
- A fulltime math coach from the Alameda County Office of Education (ACOE)
- Contracted support for the math program from ACOE and CSU-East Bay

EFC's Chief Academic Officer (CAO) oversees the organization and delivery of coaching support.

In literacy, the coaches begin the school year focusing their support on new teachers and teachers new to the curriculum. Then they transition to EFC's practice- based professional development where coaches work with a specific grade level. The content and grade level focus depends on the data. Thus, far the focus has been on improving comprehension through Text Analysis. The coaches work daily with teachers for extended periods (typically seven to nine weeks), co-teaching with them, diagnosing students' reading skills, and providing ongoing feedback to classroom teachers on their instructional practice. The goal, simply put, is to transform practice in order to speed the pace of improved outcomes for students. Each unit has intense coaching addressing the greatest needs identified through the analysis of student data.

In addition to the more formalized professional development described above, EFC schools will also be expected to leverage the extended day for teachers (3:00–4:00p.m) and other available time throughout the day (prep times) as opportunities for informal collaboration among and across grade levels. Teachers are encouraged to observe each other and other excellent teachers in the community as well as receive regular feedback on their performance, goals, and growth. Teachers are expected to consistently exchange best practices with each other and teachers at other EFC schools. The goal for EFC's focus on professional development is to create think tanks and educational laboratories for ideas, strategies, best practices, and success at each school site. Leveraging the knowledge base and creativity of motivated and dedicated staff across multiple schools will eventually provide Cox and the other EFC schools with a vast repertoire of tools to utilize in their work toward providing an excellent education for all its students.

**How are professional development activities selected?**

Professional development activities are developed with input from the teachers, grade level chairs, leadership teams, literacy teams, math and literacy coaches, and principals in conjunction with the Chief Academic Officer of Education for Change. These parties analyze test scores, review student work, and discuss educational trends before deciding on professional development activities

**How are they evaluated?**

At the end of every professional development activity, teachers are asked to evaluate the session through a written evaluation form. These forms provide input for improvement and future PD topics. In addition, administrators observe the implementation of the content presented at the professional development and evaluate student test scores as a reflection of the success of professional development activities. The significant increase in math test scores this past year was, Cox believes, a direct result of focused math professional development and coaching.

**17. Describe how you as an operator are training administrators and teachers to understand and use assessment data.**

Professional development in how to analyze data and the instructional implications is a vital component of addressing the needs of low achieving students. Teacher Leaders, Administrators, and Coaches attend trainings together and create an action plan of how to focus site level professional development to support teachers in meeting the needs of students. The additional teacher professional development and collaboration time allows teachers the opportunity to analyze data, delve into the curriculum and study the components of the curriculum that address the needs of low achieving students, learn from one another, and plan collaboratively to improve the instruction delivered in the classroom. Some examples include the following:

- Analyzing student data into specific groups such as nondecoder, low nonfluent, mid-nonfluent, and developing plans to accelerate their learning;
- Conducting item analysis to determine the specific standards students are struggling with and determining instructional responses so all students can meet the standards
- Effectively using Workshop in both Saxon Math and Open Court Reading to differentiate instruction;
- Scaffolding instruction for students so all can have access to the core curriculum;
- Collaboratively, cognitively planning lessons to maximize the engagement of all students, particularly intensive need students; and
- Engaging in Text Analysis and planning lessons to improve comprehension.

One key to using data to improve instruction is the ability to think about how to create an intervention or a change in practice. That means that using data is much more than figuring out how to track students. The most helpful assessments for teachers are those that can help guide instruction to provide individualized

learning such as the Open Court benchmark assessments that provide information on student progress toward specific benchmarks.

Process:

- Evaluate student progress
- Define the problems and needs
- Select improvement strategies and academic goals
- Initiate change

This past year, teachers received at least five session of training in data analysis.

Specifically, teachers at Cox have used a Collaborative Inquiry Cycle to analyze data. It focused on individual student needs as well as classroom needs for improvement. The principals and the coaches worked with new and veteran teachers during weekly professional development and analyzed test scores using the Collaborative Inquiry Cycle (CIC). The CIC helped teachers focus instructional interventions and provide individual support to all students.

Below is a sample of the type of analysis that is generated:

**Collaborative Inquiry Cycle: GRADE LEVEL DATA ANALYSIS**

School: _____ Grade Level: _____ Unit:
Participants:_____

**STEP 1: DATA ANALYSIS, AND TARGET GOAL, AND FOCUS AREA GOALS**
First review your own class data. Then share your data with your grade level.

Go back to your Data Analysis from the last CIC time and check your target goals. What was the outcome?

**FLUENCY OUTCOME: We □ met our goals □did not meet our target goals**
**What is your hypothesis about why you met or did not meet your goals?**
_____
_____
_____
_____

**AREA OF IMPROVEMENT OUTCOME: We □ met our goals □did not meet our target goals**
**What is your hypothesis about why you met or did not meet your goals?**
_____
_____
_____
_____

After reviewing our grade level data, we believe that the data demonstrates that we are succeeding in…

| Area of success | Evidence (i.e., ____ out of _____ students are at/ above benchmark, _____ % of students moved from intensive to strategic) | What is your hypothesis about why the data looks the way it does? |
|---|---|---|
| | | |

**FLUENCY ANALYSIS:**
Number of students at your grade level that are at benchmark or above: _____.
The number that are below benchmark: _____.

**Fluency Action Plan:**

| # of non-decoders | # of students who were non-decoders who moved up | # of low non- fluent readers | # of low-non fluent readers who moved up | # medium non-fluent readers | # of medium non-fluent readers who moved up | # of fluent readers |
|---|---|---|---|---|---|---|
| **What is your hypothesis about why the data looks the way it does?** | | | | | | |

| Names of Non-Decoders | What has been done thus far to address their needs (fluency instruction and practice)? Resources: TE, Fluency Action Plan, Fluency Training, etc. | What are your next steps? |
|---|---|---|

| Names of Low Non-Fluent | What has been done thus far to address their needs (fluency instruction and practice)?<br>Resources: TE, Fluency Action Plan, Fluency Training, etc.<br>What are your next steps? |
|---|---|

**TARGET GOAL for FLUENCY:**
**By the next unit assessment, _____ more non-decoders will be _____as measured by the OCR Unit Assessments.**
**By the next unit assessment, _____more low non-fluent readers will be _____as measured by the OCR Unit Assessments.**
**By the next unit assessment, _____more medium non-fluent readers will be _____as measured by the OCR Unit Assessments.**

**AREA OF IMPROVEMENT: After reviewing our assessment data, we also see that we need to focus improving instruction in the following areas.**

| Area in need of improvement | Evidence (i.e., ____ out of _____ students are below benchmark or intensive, _____ % of students moved from proficient to strategic) | What is your hypothesis about why the data looks the way it does? |
|---|---|---|
| | | |

Select one of the areas of improvement from above.
In reviewing the item analysis, we see that the questions that students missed the most are:

| Questions Missed | Standards assessed | Incorrect answer most students selected | What knowledge and/or skills was this question asking the student to have learned? What does this indicate students are misunderstanding/ unclear about? |
|---|---|---|---|
| | | | |

**Possible TARGET GOAL for AREA of IMPROVEMENT:**
**By the next unit assessment, _____ students will _____move from intensive to strategic in _____.**
**By the next unit assessment, _____ students will _____move from strategic to benchmark in _____.**
**By the next unit assessment, _____ students will be at or above benchmark in _____.**

Look ahead in the upcoming unit. When will this be taught again? Our instructional responses based on this analysis (to be developed during the Instructional Response PD): for these students will be:_____

**18. Describe your methods for training staff on how to educate students with disabilities in the least restrictive environment.**

As part of the new teacher and BTSA training, teachers receive training on educating students in the least restrictive environment and on inclusion. Teachers learn that these terms are not synonymous concepts. Least restrictive environment refers to the IDEIA's mandate that students with disabilities are educated to the maximum extent appropriate with peers without disabilities. The less a placement resembles the general education environment, the more restrictive it is considered. Inclusion refers to placement of students with disabilities in the general education classroom with peers without disabilities. Although placement in the general education classroom may be the LRE for some students with disabilities, it is not required in all cases. It is important for teachers to understand this difference as Cox is a school where all students with disabilities are included in classrooms with their peers. Since Education for Change at Cox Elementary is a full inclusion model, all classrooms must be the least restrictive for students. No student with a disability can be isolated for instruction as a result of his/her disability. Teachers are trained to serve all students in a similar manner and to rely on the OUSD special education staff to provide the services needed to ensure that the students receive the appropriate support needed to succeed in the general education classroom.

**School Climate and Culture**

19. **Provide a description of: The steps the school takes to be sensitive and responsive to the needs and concerns of At-risk students. (These are students who are at risk of not being successful in school and ultimately failing or dropping out. They are behind in basic skills, or they are frequently absent, or they have been suspended, or they have become pregnant, or they have been adjudicated as delinquent.)**

Many of the Education for Change at Cox Elementary students are at-risk of not being successful in school due to socioeconomic and familial reasons. Many of the students at Cox are coming from struggling families and homes where parents do not have a strong educational history. The family education level of Cox students is low, averaging 1.95 on a five point scale. Non-high school graduates constitute roughly 45 percent of the parent population, and few parents have a college degree. These students benefit most from the Education for Change at Cox Elementary program. A fundamental component to the Cox program is Choice and Commitment. Parents have a choice to send their student to Cox, but in return they must make a commitment to support the program and education. As such, students at Cox learn to appreciate their education and learning. The school reaches out to families by providing numerous opportunities for them to get involved in the school. Parents are also encouraged to attend monthly grade level specific informational meetings and trainings about how to support their students at home. At these meetings, parents are trained in the grade level content in English Language Arts and Math and given specific strategies in how to support their child's learning. Teachers provide constant communication with families through newsletters, progress reports and phone calls. Cox's Parent Center, which was opened in the fall of 2008, has been very successful in increasing the level of parent presence and involvement at the site. The center is now seen by many parents as a valuable community resource. Parents are able to take classes, support school activities and network.
Parents are taught the importance of homework time, nutrition, organization and involvement in after school activities. The school is a community of learners where at risk students thrive.

**The services that are offered by the school and the services that are provided by outside providers.**

Education for Change at Cox Elementary works closely with the East Bay Agency for Children (EBAC). EBAC improves health, offers hope and provides opportunities to Cox students and their families. EBAC has innovative programs, located throughout Alameda County, that help to prepare children to succeed in school, assist families through times of crisis, and provide therapeutic support to children who have suffered from abuse and/or neglect. One of the most valuable services that is provided through the collaboration with EBAC is an on-site clinician. The clinician provides direct mental health services for students and serves as a resource for staff and parents in addressing the mental health needs of the student population.

20. **Provide information on other educational activities your school provides students (i.e.: after-school programs, summer school). Explain the purpose behind the activities and the outcomes measured.**

Students at Education for Change at Cox Elementary participate in after-school activities that are both academic and enrichment in nature. The purpose of the intervention programs is to catch students up to the grade level expectations. Intervention programs are provided for students who are underachieving. Student data for students in the intervention program is monitored with every eight weeks to benchmark progress against the grade level expectations. This academic support is coupled with after-school activities with the Museum of Children's Art (MOCHA). MOCHA provides art classes and projects for the Cox students. Students who are not in the intervention program are invited to participate in the

enrichment program. The purpose of the enrichment program is to broaden students' exposure to the arts and recreational activities and to increase student' enjoyment of school as evidenced by higher attendance rates. The enrichment program includes classes in design, sports, technology and drama.

Recess is important to Education for Change at Cox Elementary students. According to PlayWorks, studies have shown that children in urban, low-income schools are less likely to have recess than students in other schools. The purpose of having Playworks is to increase students' engagement in active physical activity both during recess and during Playworks' class instruction. PlayWorks contends that recess is the single biggest opportunity to raise the level of physical activity for all children, yet those who come from minority or low-income families are being shortchanged when it comes to recess time. PlayWorks assists Cox by providing organized play during recess as well as regular classroom instruction in physical education. The outcomes are measured by the increased number of students engaged in active, constructive play at recess, improved PE testing scores, and the reduction of conflicts during recess.

In addition to after-school activities, Cox students participate in Study Tours. Study Tours are similar to field trips but are directly linked to the curriculum. The purpose of Study Tours is, at the beginning of a unit, to build background knowledge and increase the level of engagement in the exploration of the theme, or, at the end of the unit, to give students the opportunity to take classroom learning to a real life setting and apply what they have learned to evaluate the work of others who have studied or experienced the same content. For instance, after a unit of study on Astronomy, Cox 5$^{th}$ graders spent the day in astronomy classes at the Chabot Space and Science Center. This gave students the experience of applying what they had learned about telescopes, solar systems, and space exploration in structured activities to enhance the depth of their learning and verify much of what they had experienced through the study of text.

**21. How does the charter school collaborate with parents to encourage active participation in their student's education?**

There are numerous ways for parents to be involved in their children's education at Education for Change at Cox Elementary. As mentioned earlier, monthly meetings are held where parents receive information about school events and about how to support their students once they come home. Parents can share their ideas and concerns about the school at these meetings. In addition, parents participate in teacher conferences at least twice a year. Parents receive direct information about their child's academic progress at these conferences. Teachers also provide progress reports and newsletters throughout the year that keep the parents informed.

Cox Elementary is beginning to implement a Scholars Program for Cox families. The program is designed for the school and parents to work together to help students be more successful academically and socially.

Participation in the program is by contract. The principal, the parents, and the students commit to a set of promises that, if upheld, will contribute to better students learning. The promises focus on the following:

- Significant Parent Involvement
- Caring, Demanding, Skilled Teachers
- Good Work Habits

- Extending Curriculum to the Home
- High Expectations From Adults

- Self Discipline
- Reading in the Home

Core to the Scholars Program are trainings to help parents uphold their promises, especially around assisting their children at home. The trainings focus on supporting student learning at home in math, the sound spelling system, reading comprehension, and writing, along with word knowledge for upper grade students. In addition, participants will complete regular progress reports and convene in meetings to monitor program effectiveness and provide problem-solving opportunities for families.

Other opportunities for parent involvement include report card pick up, parent conferences that occur at least twice a year (and more often for students who are underperforming), newsletters, school events (such as the EXPO where students' work and projects are shared), Parent Leadership Council (see Appendix 15 for Parent Leadership Council Matrix), Parent Center activities, monthly grade level specific parent trainings, volunteer opportunities, and Study Tours (field trips). Cox parents are also encouraged to take an active role in supporting all aspects of the school.

**22. Describe the methods and strategies by which your school assures the provision of services to homeless children in compliance with all federal laws and regulations.**

The school will ensure that homeless students have no barriers to enrollment, will not segregate or otherwise stigmatize them by identifying them as "homeless" in any programs or services created to assist them in ensuring stability.

**23. Describe the school's key community partnerships and how they are impacting the school's educational goals.**

EFC is an Oakland-based organization and as such is intent on engaging each school community and collaborating with local partners. Lifelong learners are not just cultivated within the boundaries of the classroom or solely in the core subjects. In order for true success for the larger student body to be achieved, the school engages in consistent and meaningful dialogue around grade level curriculum and expectations and has formed partnerships with its community, reaching out to engage parents and other community members who often have not participated in the school community. One of our strongest community partnerships is with the Creekside Church in San Leandro. The church has participated in school clean ups, teacher appreciation days, and weekend "fix your bike" clinics. In addition to the church in San Leandro, Education for Change at Cox Elementary has partnerships with the following organizations:

- East Bay Agency for Children
- Museum of Children's Art
- Alameda County Office of Education
- California State University East Bay
- PlayWorks (Formerly Sports4Kids)

These partnerships substantially enhance the programs at Education for Change at Cox Elementary as the school programs are designed for intensive academic rigor, effective intervention and growth. These partnerships offer well rounded activities and support that compliment the academic program at Cox.

## Organizational Leadership

**24. Describe the process for selecting your Board of Trustees. List all current board members and provide a resume for each individual (including employer, title, phone number, and duties).**

EFC recruits qualified and appropriate candidates for the board from education, non-profit, community, business, and legal organizations. The current board is diverse in skill sets, perspectives, and backgrounds, and it can fully and responsibly govern the organization and schools while maintaining a unifying and passionate commitment to the vision and mission of EFC.

Current Board members:

Desten Broach
Hae-Sin Thomas
Jonathan Schorr
Jeff Liaw
Kevin Wooldridge

Please see attached Appendix # 9 for Board Members resumes.

**25. Describe how the board is structured and include a list of board committees. Provide a copy of board meeting attendance records for school year 2007-2008 and 2008-2009.**

The EFC Board of Trustees will consist of at least five but will not be more than eleven voting members. The board has appointed a President, Treasurer/Audit Committee, and a Secretary.

| | |
|---|---|
| Desten Broach | President/Audit Committee |
| Jeff Liaw | Treasurer/Audit Committee |
| Kevin Wooldridge | Secretary |

The Board has approved the following polices for the schools:

- Retention and Promotion
- Study Tour
- Purchasing
- Check signing
- Independent study
- Illness leave
- Financial
- Volunteer
- Expense reimbursement
- Internet use
- Instructional minutes
- Calendar
- Uniform complaint procedures

The Board has appointed Jeff Liaw and Desten Broach as the Treasurer/Audit Committee. Please see attached Appendix # 10 for Board Minutes.

**26. Describe the Board of Trustees' primary roles and responsibilities. Give an example of a recent issue/policy that the board is working on.**

The Board of Directors of EFC is responsible for the following:

- Ensuring the legal and fiscal well being of the organization and each school.
- Hiring and evaluating the EFC Chief Executive Officer.
- Approving and monitoring the implementation of policies of the organization.
- Developing and monitoring an overall operational business plan that focuses on student achievement.
- Approving and monitoring the organization's annual budget and fiscal policies.
- Acting as fiscal agent. This includes the receipt and management of funds for the operation of the organization in accordance with all applicable laws and the mission statement of the organization.
- Contracting with an external auditor to produce an independent annual financial audit according to generally accepted accounting practices.
- Regularly measuring the progress of both student and staff performance.
- Encouraging active involvement of students, parents, grandparents and the community.
- Performing all of the responsibilities provided for in the California Corporations code, the Articles of Incorporation Bylaws, and this charter as required to ensure the proper operation of the organization and member schools.

The Board most recently approved the promotion and retention policy, the Illness Policy, Internet Policy, Volunteer Policy and the Independent Study Policy.

**27. How are parents, teachers, and community members involved in the governance of the school?**

Community members make up the membership of the EFC Board. The Board members have appropriate backgrounds from education, non-profit, community, and business organizations.

While there are no parents and teachers serving on the governing board of the EFC not for profit corporate board, there are several mechanisms through which the board ensures an understanding of staff and parent issues. These mechanisms include, but are not limited to reports on: Leadership Council, Parent Leadership Council, Dine and Delve, teacher and parent satisfaction surveys.

The CEO's primary responsibility is to work with the principals to ensure that the mission of the schools is being met. The CEO serves as the primary liaison to the governing board for the school site administrators. The CEO also meets with representative groups of the schools monthly.

*Leadership Council of EFC*
The Leadership Council was formed so that staff members from each school could provide information from and to the Home Office. The Leadership Council members are self-selected by classified and certificated staff. Typically, site administrators are not part of the meetings so that staff members feel free to discuss site specific issues.

The agenda is developed at the end of each meeting by the Leadership Council members. The Leadership notes are distributed to all staff after the meeting. Any staff member can ask for clarification or comment on items discussed during the meeting. The date for the meetings are voted on and agreed upon by the current members.

Some of the issues that were discussed this past year are as follows:

- Email policy
- Report Cards
- Summer Committees
- Balancing high quality work with instruction time
- Charter renewal
- Calendar and schedule
- Attendance incentives
- Professional Development
- Benefits
- Intervention
- Coherence

*Dine and Delve*
Dine and Delve was established after the first year of EFC's existence so that all staff could have an opportunity to understand the mission and vision of EFC and to share ideas with the CEO. By its name, dining on a meal while talking about issues makes for a more comfortable conversation after a long workday.

The vision and mission is shared at each Dine and Delve. The goal is to make sure that all staff members, certificated and classified, have an opportunity to voice their concerns and offer ideas to make the organization better. Staff members also have an opportunity to ask questions of the CEO and to meet with him individually after the meeting or in small interest groups.

The following are examples of questions used to provoke conversation among participants:

- What has EFC done that is evidence of our mission in motion?
- What should EFC be doing differently to more effectively promote our mission?
- What has EFC done to reflect what it strives to offer its employees?
- What can we do together to make EFC a better place to work?
- What can you do to further the mission of EFC?

*Parents*
Parents are key members of the EFC community and their concerns are shared through contact with administrators and teachers, the Parent Leadership Council, grade level meetings and surveys. EFC site administrators have an open door policy so that parents can meet with them directly about their concerns. The parents meet monthly by grade level and these meetings also give an opportunity for parents to voice

their concerns and share their ideas. Monthly Parent Leadership Council meetings give parents an opportunity to provide input about school activities, quality of the program, and campus safety as well as addressing specific topics (see Appendix 15 for Parent Leadership Council Matrix). In an effort to provide greater consistency of participation and increased involvement in school governance, Cox parents will elect a chairperson who will serve as a liaison to the EFC board, unless another elected representative is designated by parents. Administrators also share parent concerns with the CEO who works with the Board on school improvement. Parent input is also sought through the parent surveys. Survey results are shared in detail with the board twice a year. Survey questions vary from school safety, principal competencies, quality of the program, and student support issues (see Appendix 18).

**28. Provide an organizational chart that reflects all levels of staffing and management of your charter school.**

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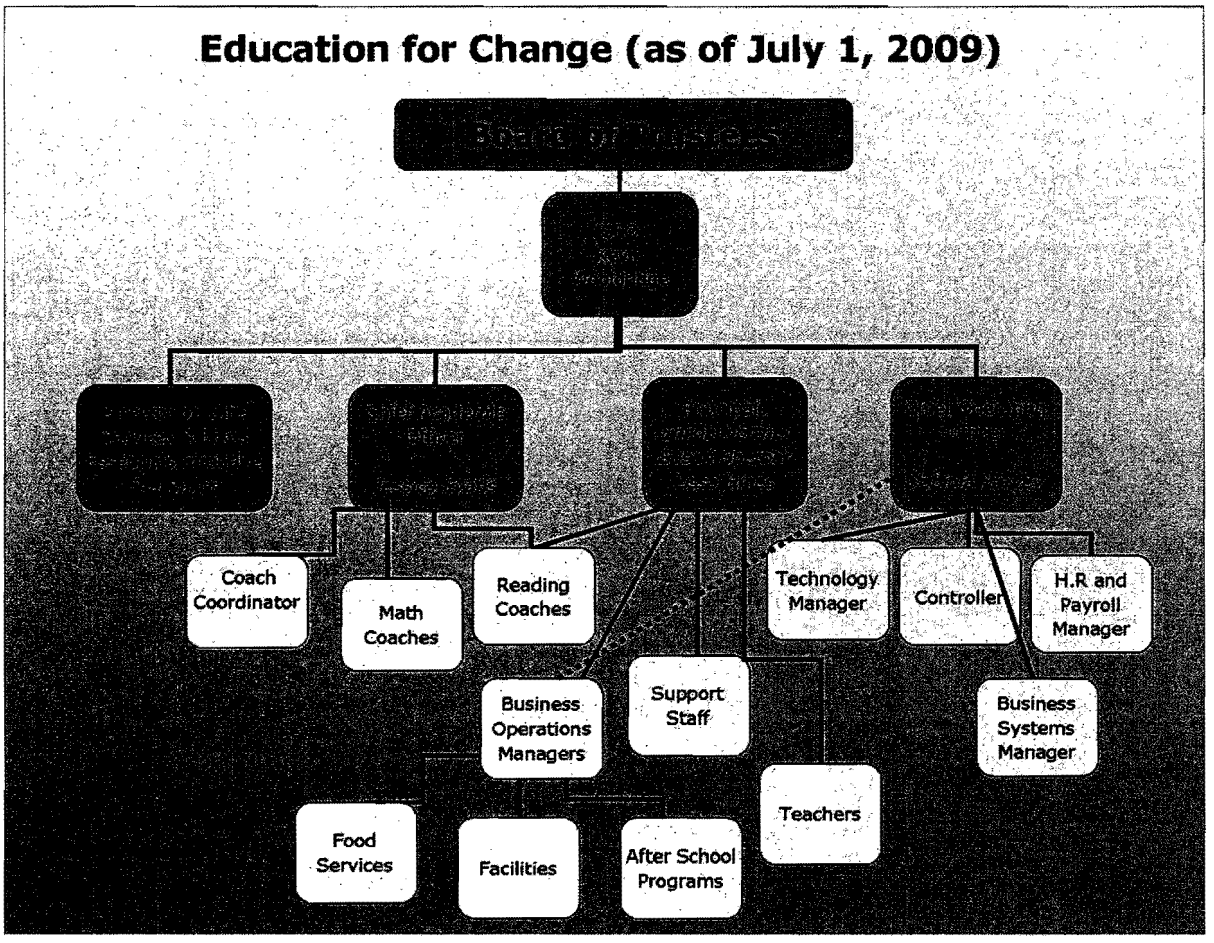


## Instructional Leadership

**29. How does your school monitor teacher and staff implementation of the school's curriculum, including its alignment with the California State Standards?**

Formal evaluations of teachers are completed by the principal midyear and at the end of the year. Staff are evaluated mid-year so that they can focus on areas of needed development as part of our process to support continuous growth for all employees.

The principal (or appropriate supervisor) meets with the faculty member to discuss the evaluation. The person's self-assessment, as well as any informal observations or formal supervision notes created since the previous evaluation, shall be discussed during this meeting. Final evaluations will be placed in the person's personnel file. The person being evaluated may add additional comments for the file if desired.

Formal observations shall include a minimum of four (4) scheduled observations to occur during the cycle; scheduled observations will include pre- and post-conferences; the first pre-conference will include a review of procedures and documents; and a minimum of two (2) non-scheduled observations to occur during they cycle.

Teachers are evaluated on the following criteria:

*English Language Arts*

- Implements the instructional program effectively
- Follows lesson planner and pacing guide
- Uses routines and procedures
- Provides evidence of instructional goals as well as instruction that consistently supports those goals
- Implements support program goals in workshops and differentiates instruction based on student need
- Uses assessment results to differentiate instruction
- Delivers the sections of OCR in the suggested time frame

*Math*

- Follows structure of the EFC program with appropriate use of TM's and routines and procedures
- Follows lesson planner and pacing guide
- Uses routines and procedures
- Provides evidence of instructional goals as well as instruction that consistently supports those goals
- Implements support program goals in workshops and differentiates instruction based on student need
- Uses assessment results to differentiate instruction

*ELD*

- Provides appropriate instruction in which specific language structures are taught
- Provides instruction that addresses listening, speaking, reading and writing
- Teaches differentiated language structures

- Provides instruction that effectively supports learning in other core subject areas

*Pace*

- Delivers instruction at an effective pace
- Varies pace based on level of difficulty, need for clarity, and level of student engagement
- Paces delivery to support coverage planned content

*Instructional Dialogue*

- Communicates with a high degree of clarity, monitoring student responses appropriately by prompting, clarifying, redirecting and delving
- Uses vocabulary that insures the appropriate cognitive demand on all students
- Communicates concisely and promotes student dialogue

*Engagement and Use of Instructional Time*

- Students are engaged and responsive
- Transition times are smooth and consistent classroom routines are evident

- All student work is held to a high standard
- Systems are in places to monitor, review and provide feedback to students
- Clear systems are in place to control for student error
- Teacher understands grade appropriate rigor

- High expectations are set and systematically reinforced
- There is clarity in the system to manage student behavior
- Teacher is comfortable setting limits in classroom
- Teacher models appropriate interactions with students

- Classroom is well organized and visually pleasing
- Classroom is free of unnecessary distractions
- Organizational systems support instruction and allow for easy transitions
- Student work is appropriately displayed
- Environment reflects school pride and the importance of learning
- Students and teacher share responsibility for maintaining learning environment

- Teacher uses assessment to improve the quality of instruction
- Teacher reviews and prepares students based on assessment purpose
- Student benchmark assessment data provides evidence of consistent progress

- Demonstrates high level of professionalism
  - Strives to be positive and self-reflective
  - Provides productive feedback
  - Sets high standard for self, focused on effectiveness not minimum requirements
  - Is a proactive problem-solver focused on solutions
  - Is consistently punctual
  - Meets deadlines and adheres to timelines
  - Shows high degree of focused "on-task" behavior

- Excellent attendance
  - Goal: 98%

- Professional Development
  - High Level of engagement
  - Content is reflected in practice

- Collaboration
  - Is a team supporter and leader
  - Always shares responsibility for group effectiveness and success
  - Seeks to share load and maintain curriculum focus
  - Always works collaboratively and is driven by student need
  - Focuses on how grade level and organization as a whole can be most successful

*Formal Classified Evaluations*
Formal evaluations for classified staff occur twice each year (once in the fall and once in the spring). The evaluation process is used to recognize high levels of performance and to help all employees continue to grow as professionals.

**What steps are taken if school administrators and teachers are not effectively implementing the school's curriculum?**

Coaching support and professional development occur regularly to support teachers and administrators in deepening the knowledge and skill required to effectively deliver or support the delivery of EFC's instructional program.

When employees of the school are not effectively implementing the school's curriculum, a conference will be held with the employee's immediate supervisor. An improvement plan will be created to support the employee. A schedule of observations will be established. Follow up conferences will be scheduled to discuss progress.

**30. Describe your approach to student discipline. Provide an example of a policy/procedure that exemplifies the approach.**

Education for Change at Cox Elementary believes that positive behavior leads to success. EFC believes in the six 'P's of a quality education experience: be prompt, be polite, be proud, be productive, be prepared, and be positive. The Cox staff regularly discusses these characteristics with the students and reward positive behavior that represents the six 'P's.

- Be Prompt
- Be Polite
- Be Proud
- Be Productive
- Be Prepared
- Be Positive

The following are a few of Education for Change at Cox Elementary rules that exemplify the 6 Ps.

1. Disruption of school: A student shall not, by the use of violence, force, coercion, threat or any other means, cause disruption or obstruction of the normal operation of school.
2. Damage of school property, including buses and bus seats: A student shall not cause or attempt to cause damage to property of EFC Schools.
3. Damage of private property: A student shall not damage private property, on or off school premises, during a school activity, function or school event.
4. Use of profanity: A student shall not use profanity of any kind
5. Harassment: Students shall not harass other students, school employees, persons who are guests of the school or persons conducting business for the school. This category also applies to remarks or actions of a sexual, racial, ethnic or religious nature that are deemed offensive.

*Code of Conduct*

The goal of the Cox Code of Conduct is to create conditions that foster student self-discipline in a warm, supportive school climate that is conducive to maximum learning for all students. The Code of Conduct is a general guide for behavior; it is not a mechanism for rigid control. The individual personalities of students or extenuating circumstances will be considered before corrective measures are prescribed. (Reference Ed Code Sections 48900 and 48915 and Health and Safety Code 11007) Please see attached Appendix # 12 Student-Parent Handbook.

## FINANCIAL MANAGEMENT & OPERATIONS

**31. Describe all ongoing efforts to ensure fiscal soundness and legal compliance.**

The governing board, in conjunction with the CEO of EFC, ensures the fiscal soundness of the schools and oversees legal compliance. EFC has developed sound processes for financial planning, financial reporting systems, and budgets. EFC staff is responsible for producing monthly financial reports and designing and implementing a policy of internal controls to ensure fiscal responsibility.

**Address the financial system and monitoring processes that are used.**

The Chief Operating Officer is responsible for the development of annual budgets that align to these strategic objectives and that have prudent financial parameters, including the following:

1. Conservative assumptions on funding rates and enrollment growth;
2. Expense projections based on actual history or quotes where possible, or on conservative estimates where empirical data are not available;
3. Compliance with all required items that have an expense implication (e.g., transportation or special education services);
4. A contingency expense for unforeseen negative developments; and
5. A prudent financial fund-balance reserve

**Specify the reports generated and the frequency; identify the party responsible for generating the reports and his/her qualifications.**

EFC prepares monthly financial statements that show, at a minimum, Year-to-Date information on actual performance, the budget, and the variance of budget versus actuals. In addition, the statements include a "rolling" revised forecast of end-of-year Revenues, Expenses and Net Surplus (or Deficit), informed by the actual Year-to-Date performance and updated assumptions (such as enrollment projections or funding rates.) This forecast is intended to identify early if the school is going off-track so that corrective action is possible while there is still time. The monthly financial report also will contain a current monthly cash-flow forecast that clearly identifies any potential liquidity problems.

Annual Audit: The school will fully comply with all legal requirements for financial reporting, including the engagement of an independent certified auditor to review the financial statements annually. The Board will approve the auditor in advance and will approve the audit report once completed. Any audit exceptions will be reported as required, and the Board will develop, approve, and monitor a remediation action plan.

EFC maintains all records consistent with Generally Accepted Accounting Principles. EFC uses an accounting software package that allows full compliance with accounting codes, and maintains the school's financial statements consistent with these codes, as required by law. The Chief Operations Officer prepares the financial reports.

The following are overviews for each of the Finance & Operations team members:

**David Tobar, Business Systems Manager**

Education For Change believes that the integrity of the Student Information Systems is of extreme importance at the schools. David has recently joined the Finance & Operations team to support the

training and development of all data owners as well as to report from and maintain all Student Information Systems. David was formerly the Office Manager at World Academy with Education for Change. Previous to that, he worked as an Escrow Coordinator and Loan Office for a Real Estate company in Hayward, California. As part of his job function, David was in charge of the day to day operations of the office. As an Escrow coordinator he maintained the files for several real estate purchasing, commercial and residential. Working towards fulfilling all the required conditions set forth by all parties, (selling, purchasing, and Title Officer) David worked hand in hand as a neutral third party in all transactions. As a Loan Officer, David built relationships with underwriters, financial managers and representatives from several well know lenders. Working ever so diligently to make certain that every and all loans that where to come through his desk would get the most detailed and required attention they deserved. In both these fields, David conducted himself professionally, always working with tight deadlines building him to be a most reliable employee. Achieving higher managerial skills David oversaw the highest volume of Real Estate transactions and loans than any other officer in the company. David's early start in the professional world has allowed him to obtain a lot of experience, gaining for himself and for his work great respect from his colleagues.

**Richard McNeel Jr., Controller**
Previous to becoming EFC's controller, Richard held the positions of Financial Operations Manager and Business Systems Manager at Education for Change (06-08). While in these positions, he implemented the Financial Accounting System for the company including accounts payable, accounts receivable and budgeting. Prior to that, Richard was a Business Services Manager with Edison Schools, Inc. where he managed two school site budgets. Prior to that, Richard was in the telecommunications industry with Metrocall, Inc. for 10 years. He Held the position of Financial Analyst over financial reporting for the region and internal control. Prior to that, he was the Regional Operations Manager over Credit and Collections, Human Resources, and the Call Center. He also held the position of Office Manager. Richard graduated from the University of Nevada Las Vegas with a Bachelors of Science in Business Administration.

**LaRayne Povlsen, Human Resources & Operations Manager**
LaRayne was formerly the Site Operations Manager for Edison McNair/Brentwood Academies in East Palo Alto. Most recently, she was also Interim Operations Manager for Edison Charter Academy in San Francisco, where she was brought in to help develop sound financial and operational practices and procedures. LaRayne has worked successfully in the field of education in a variety of capacities for over 30 years managing state and federal budgets. Her knowledge of the education world comes from her experiences of establishing procedures for one of the State Board's first charter schools, e.g. setting up accounts with the city controller, fingerprint implementation, State reporting, attendance reporting, establishing the State nutrition program. She successfully managed the budgets of 3 charter schools. In her capacity of Site Operations Manager, she oversaw the closing of one of the charter schools.

**Conan Newton, Technology Manager**
Previous to EFC, Conan served as IT Supervisor for the Northern California offices of Ameriprise Financial, he also served as Operations Supervisor and Client Services manager at Bass Tickets and Ticketweb. Conan has over 12 years of success in the Information Technology world. His experience with the high pressure world of Financial Advisors, banking and ticketing has served him well for dealing with the rough and tumble world of Education. Conan is used to dealing with adverse situations and is firmly committed to bringing technology solutions to teachers and staff and giving them the tools they need, to give the students the tools they need. Additionally, Conan is the point person on the execution and

envisioning of the Education for Change computer lab program. Conan lives in Oakland and is committed to the success of our children and the community.

**Sandra F. Nava, Business & Operations Manager**
The Education for Change Operations Model calls for a Business Manager per campus. Sandra holds the position of Business & Operations Manager where she effectively oversees facilities, food services and the before/after school programs for the two Education for Change Public Schools located on the same campus, Achieve Academy and World Academy. Sandra also worked successfully as a school secretary and later as the Office Manager for World Academy, an Education for Change Public School with approximately 480 students. Previous to this, Sandra was able to work directly with students on a daily basis as an Instructional Assistant for the Oakland Unified School District, After several years, she then became a Health Assistant for OUSD, where her attention to detail served well in keeping the school health records in order and in compliance with the state requirements. Sandra has worked in the education field for approximately fifteen years. She was born and raised in Oakland and brings a lot of community knowledge.

**Kimberly Powell, Business & Operations Manager**
Kimberly is the Business & Operations Manager at Education for Change at Cox. She has been with Education for Change since its foundation. She has held the positions of Operations Support Specialist (05-07) & Home Office Manager (07-08). She currently holds the position of Business and Operations Manager, where she oversees facilities, food services, and the before/after school programs at Cox. Kim also worked for Oakland Unified School District for 11 years, prior to coming aboard to Education for Change. She worked as a school secretary and administrative assistant at school sites and spent the last five years as a site team assistant in the Human Resources Department. Kim also attended Oakland Public Schools.

**Chief Operating Officer, Fabiola Harvey**
Fabiola held the positions of Director of Finance & Operations (08-09) and Controller (06-07) at Education for Change. Previous to this, Fabiola served as the Area Financial Manager for the Las Vegas cluster of Edison Schools where she led the start-up and transition of the business operations for 7 schools with over 6000 students and 500 employees in Clark County School District. This was the first time the district awarded a cluster of schools to be managed by one charter management organization. Prior to working in Las Vegas Fabiola was the Business Manager for one of the most troubled schools in San Francisco Unified School District. At Edison Charter Academy, Fabiola was able to turn around a difficult financial situation and get the school on firm financial standing. Fabiola brings 14 years of experience and a wealth of knowledge as well as a long standing commitment to urban education. Fabiola was born and raised in Mexico City where she got a double degree – Modern Languages and English as a Second Language Teaching Diploma- from the Centro Universitario Anglo Americano.

**Describe the fiscal review and monetary processes, including but not limited to policies regarding a) cash flow, b) purchasing, c) payroll and d) audits; identify the party responsible and his/her qualifications for the role.**

*It is the intent of these Financial Policies and Procedures to implement both the letter and spirit of all applicable State and Federal regulations regarding the expenditure and accounting for public funds.*

*Budget Adoption*

A balanced budget shall be adopted by the Board of Trustees no later than June 30 prior to the start of each new fiscal year. During the course of the year, the Board may adopt an amended budget as expenses and revenue projections change.

*Audit*

An annual audit by an outside firm shall be performed as soon as is practicable each year on the close of the prior year's books. The audit shall include, but not be limited to (1) an audit of the accuracy of school's financial statements, (2) an audit of the school's attendance accounting and revenue claims practices, and (3) an audit of the school's internal controls practices.

If the school receives over $300,000 from federal sources, the audit shall be prepared in accordance with any relevant Office of Management and Budget audit circulars. The audit firm shall be on the State approved list of school auditors.

At the conclusion of the audit, the management team will review the audit with the Board and propose any changes necessary in operating procedures to comply with audit findings.

Board Treasurer

It shall be the responsibility of the Board Treasurer oversee the review the monthly bills, the monthly financial statements (cash flow, profit and loss, and balance sheet), and the petty cash ledger prior to the next Board meeting, and provide any necessary recommendations at the meeting. The Treasurer may delegate and coordinate the review with the Chief Operating Officer for EFC.

Contracts

All contracts for goods and services (other than teaching) exceeding $50,000 on an annual basis, shall be presented to the Board for approval prior to signing. Length of contracts shall be at the discretion of the Board. Contracts exceeding $10,000 (and up to $50,000) may be approved directly by the EFC CEO after a bidding process of sufficient duration to ensure competition. The bidding process is not required for the CEO to independently approve contracts under $50,000 for the purpose of staff development, training, or those related to specific curriculum development.

For contracts exceeding $50,000, bid tabulations shall be presented to the Board for all along with a recommendation for action. The Board reserves the right to select whichever vendor it deems most prepared to provide the required goods/ services without regard to the low bidder being the automatic selection.

The Board may elect to modify these limits as it sees fit. Teachers' annual employment agreements shall be reviewed by the Board Personnel Committee with recommendation to the Board.

Conflict of Interest

Any Board member with a financial interest in a matter presented to the Board shall fully disclose such interest prior to Board discussion on the issue and shall recuse themselves from the discussion and voting on the matter.

Purchase Orders

A purchase order policy is necessary in order to monitor and control, prior to obligation, the disbursement of the school's funds. Purchase orders fall into three categories:

The CEO or COO must approve purchase orders prior to processing that exceed $5000.

The Principal must give approval prior to processing a purchase order for an amount less than $5000, but greater than or equal to $500.

1. All purchase orders less than $500 may be placed by the office manager with the verbal approval of the Principal.

Credit Card Usage
The Board may authorize through official Board action, establishment of credit cards with various agencies, e.g., Office Max, VISA, American Express, etc. Such credit card use shall be strictly monitored with a monthly review of the bills for each card that the Board has authorized.

Bank Account Establishment
The Board shall authorize the establishment of a commercial bank account. Funds will be deposited in non-speculative accounts including federally-insured savings or checking accounts or invested in non-speculative federally-backed instruments.

Signatories to the account shall be the Board Treasurer, the CEO, and the Chief Operating Officer. Two signatures shall be required on all checks greater than $25,000.

The Board may either pre-authorize all expenses of $25,000 or greater, or grant authority to the Board Treasurer to approve such amounts on a case by case basis.

Petty Cash
The Principal and Office Manager shall have access to a petty cash fund not to exceed $2,000. Such funds shall be used at the discretion of the Principal subject to Board oversight.

Use of the fund shall require either the original receipt or a signed expense statement from the party requesting reimbursement.

The petty cash shall be funded from the Education for Change primary bank account. A simple ledger shall be maintained by the office manager for review by the Board Treasurer during the monthly review.

School Cash (Hard Currency)
It is critical that the school handle hard cash carefully to avoid all appearances of impropriety. To this end, the following process must be followed:

1. All cash collected must be immediately deposited in the school's general account. Cash may be stored in the school safe if not more than $500.00. Once cash collections have exceeded $500.00, cash must be deposited into the general EFC account.

2. A record of the source of the funds should be kept along with the deposit receipt from each deposit. These receipts for all deposits should be copied and submitted to the home office with a summary report outlining all sources of funds.

3. In no event should cash be used to fund incidental expenses. Either employees should pay for these expenses and be reimbursed, or the school's Petty Cash checking account should be used.

Personal Use of School Funds

Use of school funds for personal use is absolutely prohibited. Violation of this policy shall result in discipline up to and including dismissal from employment, and/or removal from the Board as applicable.

Employee Reimbursements

Business meals and mileage shall be reimbursed using standard IRS guidelines for the Bay Area. Under no circumstances shall alcohol be reimbursed.

Capitalization of Assets

1. Single purchases of $2000 (Two Thousand dollars) or more shall be capitalized as an asset in the financial records of the organization. These include land and land improvements, buildings and building improvements, equipment, and all other tangible and intangible assets that are used in operations and that have initial useful lives extending beyond a single reporting period.

2. Inventory of capital assets: Education for Change will voluntarily conform with Education Code requirements (Ed Code 35168) for inventorying capital assets by establishing and maintaining a historical inventory or an audit trace inventory system which shall contain the description, name, identification numbers and original cost of all items of equipment acquired by it whose current market value exceeds two thousand dollars ($2000) per item, the date of acquisition, the location of use, and the time and mode of disposal. A reasonable estimate of the original cost may be used if the actual original cost is unknown.

Purchasing Procedures for EFC

1. General Information:
    a. It will be the responsibility of the Purchasing Department to convert requests (requisitions) into Purchase Orders or service contracts. Only authorized officers of the Purchasing Department can create Purchase Orders or sign off on service contracts. Any unauthorized creation of a Purchase order or signing of a services contract is a direct violation of EFC policy.
    b. Any commitment of EFC funds can only be made by budget managers, and only up to the limits of their budget approval authority. Under no circumstance, will a contract be signed without review by the finance and operations team at the home office to determine EFC liability, appropriate invoicing methods, and the requirements for open bids as required by board approved EFC financial policies.
    c. The individual that violates this policy will assume personal responsibility for any such commitment and Education for Change will not assume responsibility. Any willful violation of this policy is immediately punishable up to and including termination.

2. Purchasing Department Points of Contact:
    a. Business Systems Manager
    b. Controller
    c. Chief Operating Officer

3. Methods of Committing Company Funds:

a. Employee reimbursement: Purchases of supplies or services with personal funds with the intended purpose of being reimbursed by Education for Change are a commitment of funds. Until a budget line is assigned by the appropriate budget manager and the purchase amount has been approved by the required approval authority, EFC employees should consider purchases made with personal funds at risk of NOT being reimbursed. Employee expense reports and reimbursements do not exist outside of EFC purchasing controls. Travel expenses are outlined in a separate document.
b. Committing in writing to any services contract (signing contracts)
c. Approving a Purchase Order, sending in an order form, verbal orders to established or not established vendors.
d. Receiving delivered items. Many vendors consider "receipt of goods" as proof of purchase.
e. Use of the Petty Cash Account: Budget managers with access to a petty cash account may also utilize this as a purchasing method. However, the use of this account is limited to purposes expressly defined in the petty cash account use policy. This is not an intended source for day-to-day purchases, but a source of funds intended to be used to expedite cash payment when absolutely required by the specific circumstance. Abuse of the petty cash account by any Budget Manager will result closure of the account and suspension of this optional and convenient payment method.

4. Approved Methods of Purchasing:
   a. Budget Manager (such as Principal, B.O.M.) or his/her designee (such as the Office Manager) creates a Request for Purchase (Purchase Requisition) in the Apta Fund Accounting System (Apta) based on established approval limits (section 5).
      i. Budget Manager or designee obtains quote from the vendor for the items needed.
      ii. Budget Manager or designee creates requisition in Apta using as much item detail as is possible. Include vendor, item number and description, item cost, item coding, shipping address. Add taxes and 10% for expected shipping costs. This is important for receiving items against the Purchase Order. Be sure to use the comments field to make any special requests.
      iii. If the vendor is not currently established, the Budget Manager or his/her designee will obtain all relevant vendor information including mailing address and bill payment address as well as a phone and fax number and a contact name and extension if possible. If the vendor is not a fortune 500 company or does not have "inc." as part of its official company name and on its letterhead or invoice, a W-9 is required as well. Forward this to the Purchasing department. This process is automated and executed via e-mail. It is the policy of EFC to use a limited amount of vendors to fully leverage purchasing power. Therefore, it is possible that a request to add a vendor will be met with a rejection and a replacement vendor.
      iv. The Purchasing Department will create the Purchase Order (regular, blanket or dollar) based on various factors including available budget and fund appropriateness. The Budget Manager or his/her designee can then print the P.O. from Apta to fax to vendors or scan and e-mail where appropriate.
      v. All purchases made from vendors who will accept PO numbers must be made using this purchasing method.
      vi. Maintain records of quote and forward PO with quote to Purchasing Department.
   b. Personal credit card (to be replaced by EFC AMEX) reimbursed via Employee Expense Report.

i. Generate a Purchase Requisition in Apta for anticipated expenditures that exceed Budget Managers approval limit.
ii. Wait for a Dollar Purchase Order to be created by the Purchasing Department.
iii. Reimbursement via weekly expense report filed at Home office and approved by appropriate Signature Authority.
iv. Original receipts only.
v. Not to exceed preliminary approval limits by purchase and a maximum monthly amount of $2,500.00 without approval in writing from the Operations Vice President.
vi. Employee Expense reports: Must include budget line for every purchase made with approval authority required from budget manager before being submitted for processing by the Purchasing Department.
vii. All receipts and corresponding Expense Reports MUST be received by the Home Office Purchasing Department within 30 days of the transaction date on the receipt. Failure to meet this deadline will result in the employee assuming liability for the purchase.

5. Preliminary approval limits for all purchases
   a. <$500 Business and Operations Managers
   b. <$1000 Controller and Principals
   c. >$1000 Chief Operating Officer

6. Receiving Merchandise:
   a. Budget manager is responsible for ensuring that purchases are received and inventoried upon arrival. The budget manager may designate a responsible receiver at each site who will check in items using the packing slip or the receipt copy of the Purchase Order.
   b. The Business Operations Managers, the Principals, or their designee will receive all items and inventory the delivery against the Purchase order in Apta using the documentation from (6a) if possible.
   c. The Purchasing Department will pay the invoice once the inventory is complete, and the Purchase order has been marked as "received in full" in Apta.
      i. There could be a circumstance where the Controller or the Chief Operating Officer authorizes an invoice to be paid prior to receipt in full of the Purchase Order in Apta should there be extenuating vendor circumstances.
      ii. All items that are to be returned, such as duplicate shipments and damaged merchandise will be done by the site. Failure to return unwanted merchandise will result in a charge against the Budget Managers budget.

**32. Describe the board's processes for holding the school financially and operationally accountable.**

The Board reviews financial statements of each school at every Board meeting. The Board approves the check registry. The Board develops and approves the budgets and any major changes to the budgets in including interim budgets. The Board develops financial policies and procedures with the CEO and Chief Operating Officer (COO). The Board hires and dismisses the COO. The Board hires the auditor and a subcommittee of the Board develops any fiscal remediation plans as necessary which is approved by the full Board.

**33. Describe how key non-academic operations are conducted, including (but not limited to):**

- **Strategic Planning**

Decisions of where the organization is going and by when are decided at the Board level between Board Members and Organization's Officers. The "how are we going to get there?" work begins between the Chief Executive Officer, Chief Academic Officer, Chief Operating Officer and Controller during the Spring according to current student data. Adjustments, if necessary, are made immediately after CST Scores have been received during the summer. All decisions are aligned with the organizations goals for that year or upcoming years. There are many factors that we consider under the strategic plan: Current economy trends and cashflow, competitive salaries and benefits packages for all employees (EFC has been paying 100% of employees benefits for the first five years of its charter), fixed payments such as rent, utilities, Special Ed. Encroachment, a yearly plan for Professional Development, Curriculum (new and replenishment) and the allocation of the remainder of the funds to ensure that all schools are equipped appropriately to deliver our goals.

- **Financial Management**

The Chief Operating Officer's team includes:

  - Controller who oversees all financial management systems and reporting for the organization. His main responsibilities are to keep up-to-date financial data, accounts receivables, accounts payables, audit requirements, compliance and banking.
  - Business Systems Manager main role in our team is to keep all Student Information Systems current and ensure compliance with the State of California requirements. He trains and works hand in hand with all data owners to ensure the integrity of the database.
  - Human Resources Manager who is responsible for all human resources, payroll and benefits programs.
  - Technology Manager whose primary role is to ensure that all technical systems are working efficiently and the implementation of new technology as the need arises.
  - Business Operations Managers who oversee the facilities, food services and after-school programs operations.

- **Operations**

Controller, Business Systems Manager, Human Resources Manager, Technology Manager and Business and Operations Managers all report to the COO on all operational aspects of the organization. There is daily communication between all and a formal monthly meeting to assess risks and opportunities.

- **Facilities**

Business Operations Managers (BOM's) are responsible for all aspects of schools facilities. They oversee the custodial team and outside vendors as well as coordination with all OUSD maintenance team members. BOM's are responsible for delivering outstanding facilities condition to our parents, students and staff.

- **Food services**

Business Operations Managers (BOM's) are responsible for all aspects of food services. They oversee the food services staff and work collaboratively with all food vendors to ensure the delivery of a successful and nutritious program for our students. BOM's are responsible for reporting Free and Reduced to the appropriate government parties.

- **After-school programming**
  Business Operations Managers (BOM's) work collaboratively with administrators including the CAO and lead coaches to implement an after-school program that supports the regular instructional day goals as well as providing an enrichment program that includes: dance, art, design, science, computer technology and p.e.

Identify the parties responsible for each area, their job responsibilities, and provide the relevant qualifications of these entities for providing non-academic operational services.

Please see above overviews of each team member.

**34. Please provide a projected 5-year budget. If charter operates multi-campuses the projected 5-year budget should include the following components:**

- **CMO level budget**
- **Individual campus level budgets**
- **Aggregate network level budget (campuses plus CMO) Please make sure to factor in development projections into the appropriate budgets for any upcoming initiatives such as facilities improvement projects, site moves, technology upgrades, etc.**

Please see attached Appendix # 6 and 6.a Budget and Budget Narrative

## FACILITIES/ ADA

**35. If applicable, are your current lease(s) still valid? Do they extend through the end of your requested charter term (2011-2015)?**
Our current lease is valid until 2012.

***Questions 36 through 39 are non-applicable as OUSD is our landlord.***

**40. Please describe your procedures for providing accommodations for persons with communication-related disabilities (other than student IEP requirements), such as:**
- **Sign language interpreters for parent-teacher conferences with deaf parents or events;**
- **Braille, large print & other alternate formats of written materials for people with vision impairments who want to attend community events;**
- **Please attach copies of any written procedures regarding the provision of these accommodations, and list any outside vendors you use to provide them.**

The guidelines outlined below apply to parents/guardians who wish to attend any EFC public function or meeting, including but not limited to parent teacher conferences and all school-related activities.

All EFC facilities are ADA compliant and EFC is committed to supporting parents/ guardians in having access to all information and events

Requests for Reasonable Accommodations
Individuals who are disabled may request reasonable accommodation to assist the individual in accessing EFC facilities, programs, or school related events. They should contact the school principal to request such accommodations. No one will be turned away because of a disability, and no one will be charged for reasonable accommodations. An individual is considered a person with a disability if he or she has

1. a physical or mental impairment that substantially limits one or more major life activities,

2. a record of such an impairment, and

3. is regarded as having such impairment.

Major life activities include, but are not limited to, functions such as caring for oneself, performing manual tasks, walking, seeing, hearing, speaking, breathing, learning, and working.

Examples of auxiliary aids or services that may be provided as a reasonable accommodation include, but are not limited to extra staff assistance, readers, interpreters, assisted listening devices, TDD machines, electronic mail, audio tapes, computer CDs, paper, and pen.

*Program Materials and Services*
Publicity for programs or events will mention accessibility. This will encourage people to ask for accommodations rather than assume it is not available. Someone in each school is designated to handle such requests.

A list of disability resources available in the county will be developed and distributed to EFC employees and will be available to the public through the school's website.

*Complaint Procedure*
The school encourages members of the public with complaints regarding access to a facility, program, or event to attempt to resolve those complaints through the school's dispute resolution process of Uniform Complaint Procedure as stated in the schools' charters.

## FUTURE PLANS

**41. Discuss the key challenges or risks that you see for your school in the next five year period. Describe what you are doing or plan to do to address each of the major challenges that you have identified.**

Education for Change is at a pivotal moment. Its three schools have made important gains in increasing student achievement for Oakland's most vulnerable students and have built a foundation of good instructional practice in the core subjects of reading and math. EFC has begun process to ensure that we provide a deeper and more comprehensive coverage of all state standards.

While scores have improved, Cox wants to accelerate academic gains in English Language Arts and Math to ensure that students leave elementary school prepared and poised to continue their success all the way to college. Accelerating growth will require that EFC follow several key lessons from its own experience and from research. These include focusing relentlessly on improving instruction, building teachers' content knowledge and understanding of the curriculum, and holding everyone accountable for maintaining the highest expectations for students.

The following is EFC's plan to achieve these transformational results for students. The plan has two pillars.

> **Taking instructional practice to the next level** by focusing on reading comprehension through text analysis, organizing math instruction around the "big ideas" and relational thinking, shifting to a practice-based model of professional development, strengthening the ELD program, and ensuring a deeper integration of Science and Social Studies.
>
> **Developing Talent Throughout the Organization** by building a culture of high expectations and performance, increasing teachers' content knowledge in literacy and math, building teacher leadership, and supporting the development of classified employees.

Some of these strategies have already been put in place, and we will spend the next five years perfecting and refining these strategies.

***Taking instructional practice to the next level***
*Focusing on reading comprehension through text analysis*
EFC's plan for improving literacy instruction centers on two critical ideas. First, if students are to improve in accurately reading and understanding new and unfamiliar text at their grade level, they will need to develop the habit of reading accurately for meaning. This means working to help students to develop the ability to simultaneously decode, follow the meaning of the words, and process the logic in what they are reading.

Second, if students are to learn to use written material as a tool for learning, then they will need to be engaged in what they perceive as important work related to reading. This needs to be work that helps them to develop skills in analysis of text, in understanding literary elements and in how reading for information and for understanding the world leads to new insights and experiences. Given the data that suggest EFC is successful in helping students learn to decode but is still improving at supporting students' comprehension, all of EFC's resources to support better literacy instruction will be focused on improving reading comprehension through text analysis in the context of the Open Court curriculum (see Appendix 19 for details of Text Analysis).

*Organizing math instruction around the big ideas and relational thinking*
Two principles undergird the plan for improving the math curriculum at EFC. First, there are key standards from the California Mathematics Framework that students need to master. Second, there are big ideas that are critical to understanding math and that are fundamental for continued student success in higher mathematics. Effective instruction around these big ideas requires that students use the math to solve problems, apply logical reasoning to justify procedures and solutions, and make connections within and outside mathematics. EFC is committed to organizing its mathematics program to maximize students' access to both the key standards and the big ideas and has done so through the reorganization of its' pacing guide and trimester tests.

After two years of implementation of Saxon, EFC now recognizes the need to enhance the program. EFC has entered into a partnership with the Alameda County Office of Education to spearhead the work of building teacher content knowledge as well as developing their skills in teaching students to see the relationships in mathematics. Enhancements of lessons are specifically designed to increase students' conceptual understanding of key material and develop students' ability to manipulate numbers. Where the data has shown trends in specific areas of weakness, grade level teams plan specific mitigations to proactively address them. One of the most powerful enhancements is teaching students multiple was to approach algorithms and problem solving.

*Shifting to a practice-based model of professional development*
From its inception, EFC has placed a priority on building strong professional learning communities as foundation for improving instructional practice. Teachers regularly engage in collaborative planning both with their grade level and with coaches EFC has shifted to practice-based professional development, a model of support based on helping teachers directly in their practice over an extended period of time.

*Strengthening the ELD program and ensuring a deeper integration of Science and Social Studies*
In reviewing the data (student achievement data, observational data and teacher reported data) EFC determined that the ELD curriculum previously selected was not resulting in the growth expected. As a result, a committee of teachers, along with Home Office and administrative input, selected the Language for Learning, Language for Thinking and Language for Writing curriculum as EFC's new ELD program. We expect the implementation of this curriculum will render at least a year's growth on the CELDT for all students.

While EFC teachers have leveraged Open Court themes and the Science and Social Studies Connections to address Science and Social Studies standards, EFC realizes that the depth to which these standards have been covered is not sufficient. In past summer committee work, teams of teachers and coaches have made significant progress in the development of our Standards Connections document and grade level plans, which identify the Science and Social standards, the resources within Open Court to address the standard

as well as supplemental read alouds and student texts to address the standards not adequately covered . (See Appendix 20 for Standards Connections document and sample grade level plans.)

Planned committee work will complete the development process by August of 2010 and implementation will begin in the fall of 2010.

***Developing Talent Throughout the Organization***

EFC recognizes that its' most important assets are its employees, including teachers, principals, classified staff and home office leaders. Dramatically improving student achievement will require vigilance around the adult expectations for students and continued investment in upgrading the skills and knowledge of employees.

*Building a culture of high expectations and performance*

Low expectations for students in urban educational settings are pernicious, and the battle against them is constant. Based on experience to date, in attempting to maintain high expectations, EFC is embarking on the EFC Essentials Initiative. The Initiative is an effort to develop a common understanding of the essential functions of everyone's job. Across all jobs is an expectation that individuals will follow through consistently on commitments and maintain high standards for all students without excuses.

*Increasing teacher's content knowledge*

With a large number of new teachers, EFC recognizes the need to dramatically increase teachers' content knowledge in the core subject of literacy and mathematics. In literacy and mathematics, the primary strategy for accomplishing this is the content coaching described earlier and the Literacy Leadership Team/ Math Leadership Team inquiry approach described below. This is supplemented by weekly professional development sessions that rotate among reading, writing, and math. Additionally, in mathematics, EFC is offering college level mathematics courses in collaboration with California State University- East Bay.

*Building teacher leadership*

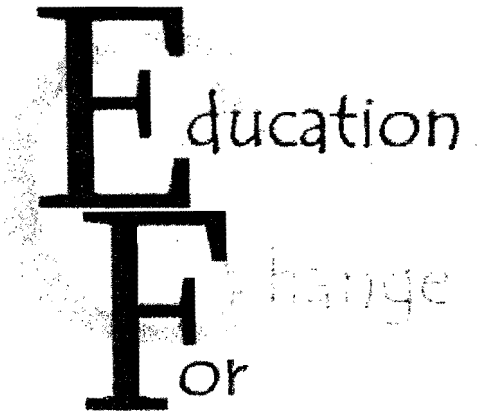
Across all subject areas, EFC also plans to invest in building teacher leadership as a means to improve teachers' knowledge and practice. EFC will identify a core group of the most highly-skilled classroom teachers in the organization and provide them with a stipend to open their classrooms and demonstrate their practice to their colleagues. In addition, these expert teachers will be trained and supported to conduct ongoing action research, continuously monitoring, refining and adjusting their practice in support of EFC's effort to strengthen the educational model.

In addition, grade-level chairs will be given stipends to participate in content specific training and inquiry as members of the Literacy Leadership Team (LLT) or the Math Leadership Team (MLT). In addition to building their own content knowledge through these trainings and inquiry, members of the LLT and MLT share their knowledge with their colleagues during professional development and grade level meetings. Grade level chairs also apply the results of their inquiry to shape EFC plans in each of the content areas. This model also involves site level action planning to ensure the implementation of the professional development and the content plans. Through this investment, EFC expects to increase teacher leaders' ownership of the overall strategy, which is critical to bringing effective practices to scale throughout the organization.[1]

[1] Cynthia E. Coburn (2003) *Rethinking Scale:Moving Beyond Numbers to Deep and Lasting Change.* Educational Researcher, Vol. 32, No. 6, pp. 3–12 .

*Classified employee development*

Finally, EFC is committed to supporting classified employees and increasing their ability to support student success. In particular, EFC wants to ensure the highest level of performance of its three office managers and its two Business Operations Managers. EFC has also created the Business Operations Manager position in order to free principals to focus on instructional management and leadership. These staff members have been included in the EFC Essentials Initiative and receive regular, specialized training and support from the Business and Operations staff. Further, EFC is undertaking a series of meetings with classified staff to identify training needs and establish a professional development plan for 2009-10 and beyond.




IN PUBLIC SCHOOLS

**BYLAWS**

**of**

**EDUCATION FOR CHANGE**

## TABLE OF CONTENTS


| | | Page |
|---|---|---|
| ARTICLE I -- PRINCIPAL OFFICE | | 2 |
| ARTICLE II -- MEMBERSHIP | | 2 |
| ARTICLE III -- BOARD OF DIRECTORS | | 2 |
| Section 1. | Powers | 2 |
| Section 2. | Number and Qualification of Directors | 2 |
| Section 3. | Limitations on Interested Persons | 2 |
| Section 4. | Selection and Term of Office of Directors | 3 |
| Section 5. | Vacancies | 3 |
| Section 6. | Resignation and Removal | 3 |
| Section 7. | Annual Meetings | 3 |
| Section 8. | Special Meetings | 3 |
| Section 9. | Notice | 3 |
| Section 10. | Waiver of Notice | 3 |
| Section 11. | Quorum | 4 |
| Section 12. | Action Without a Meeting | 4 |
| Section 13. | Telephone and Electronic Meetings | 4 |
| Section 14. | Standard of Care | 4 |
| A. | General | 4 |
| B. | Investments | 5 |
| Section 15. | Inspection | 5 |
| Section 16. | Director Compensation | 5 |
| Section 17. | Executive Compensation Review | 5 |
| ARTICLE IV -- COMMITTEES | | 6 |
| Section 1. | Board Committees | 6 |
| Section 2. | Advisory Committees | 6 |
| Section 3. | Audit Committee | 6 |
| Section 4. | Meetings | 7 |
| A. | Of Board Committees | 7 |
| B. | Of Advisory Committees | 7 |

ARTICLE V -- OFFICERS ..... 7
Section 1. Officers ..... 8
Section 2. Election ..... 8
Section 3. Removal ..... 8
Section 4. Resignation ..... 8
Section 5. Vacancies ..... 8
Section 6. President ..... 8
Section 7. Vice President ..... 8
Section 8. Secretary ..... 8
Section 9. Treasurer ..... 8

ARTICLE VI -- CERTAIN TRANSACTIONS ..... 9
Section 1. Loans ..... 9
Section 2. Self-Dealing Transactions ..... 9
Section 3. Approval ..... 9

ARTICLE VII -- INDEMNIFICATION AND INSURANCE ..... 9
Section 1. Right of Indemnity ..... 9
Section 2. Approval of Indemnity ..... 10
Section 3. Advancing Expenses ..... 10
Section 4. Insurance ..... 10

ARTICLE VIII -- MISCELLANEOUS ..... 10
Section 1. Fiscal Year ..... 10
Section 2. Contracts, Notes, and Checks ..... 10
Section 3. Annual Reports to Directors ..... 11
Section 4. Required Financial Audits ..... 11
Section 5. Electronic Transmissions ..... 12
Section 6. Amendments ..... 12
Section 7. Governing Law ..... 12

BYLAWS
of
EDUCATION FOR CHANGE

## ARTICLE I
## PRINCIPAL OFFICE

The principal office of this corporation shall be located in the county of Alameda, California.

## ARTICLE II
## MEMBERSHIP

This corporation shall have no voting members, but the Board of Directors may, by resolution, establish one or more classes of nonvoting members and provide for eligibility requirements for membership and rights and duties of members, including the obligation to pay dues.

## ARTICLE III
## BOARD OF DIRECTORS

Section 1. Powers. This corporation shall have powers to the full extent allowed by law. All powers and activities of this corporation shall be exercised and managed by the Board of Directors of this corporation directly or, if delegated, under the ultimate direction of the Board.

Section 2. Number and Qualification of Directors. The number of directors shall be not less than three nor more than nine, with the exact authorized number of directors to be fixed from time to time by resolution of the Board of Directors.

Section 3. Limitations on Interested Persons. At all times, not more than 49% of the directors of this corporation may be interested persons. An interested person means either:

(a) any person currently being compensated by this corporation for services rendered to it within the previous twelve months, whether as a full-time or part-time employee, independent contractor, or otherwise, excluding any reasonable compensation paid to a director in his or her capacity as director; or

(b) any brother, sister, ancestor, descendant, spouse, brother-in-law, sister-in-law, son-in-law, daughter-in-law, mother-in-law, or father-in-law of any such person.

Section 4. Selection and Term of Office of Directors. The directors then in office shall elect successors to the directors. Except for the initial directors appointed by the incorporator, and as provided below, each elected director shall be elected for a term of three years and shall hold office until a successor has been elected.

(a) Staggered Terms. One-third of the total authorized number of directors shall be elected in each year, at the annual meeting or as soon as practical thereafter. Whenever a new director position is authorized as provided in Article III, Section 2, the Board may elect the initial incumbent to an initial term of one or two years in lieu of the standard term of three years, so that approximately one-third of all directors' terms shall expire each year. If the total authorized number of directors at any time shall not be evenly divisible by three so that a different number of directors must be elected one year out of every three, this different number shall be elected in every third year after 2005.

Section 5. Vacancies. A vacancy shall be deemed to exist on the Board in the event that the actual number of directors is less than the authorized number for any reason. Vacancies may be filled by the remaining directors for the unexpired portion of the term.

Section 6. Resignation and Removal. Resignations shall be effective upon receipt in writing by the President (if any), the Secretary, or the Board of Directors of this corporation, unless a later effective date is specified in the resignation. A majority of the directors then in office may remove any director at any time, with or without cause.

Section 7. Annual Meetings. A meeting of the Board of Directors shall be held at least once a year. Annual meetings shall be called by the President (if any), or any two directors, and noticed in accordance with Section 9.

Section 8. Special Meetings. Special meetings of the Board of Directors may be called by the President (if any), or any two directors, and noticed in accordance with Section 9.

Section 9. Notice. Notice of the annual meeting and any special meetings of the Board of Directors shall state the date, place, and time of the meeting and shall be given to each director at least four days before any such meeting if given by first-class mail or forty-eight hours before any such meeting if given personally or by telephone, including a voice messaging system, or by other electronic transmission such as e-mail, in compliance with Article VIII, Section 5 of these Bylaws.

Section 10. Waiver of Notice. The transactions of any meeting of the Board of Directors, however called and noticed and wherever held, shall be valid as though taken at a meeting duly held after proper call and notice, if a quorum is present, and if, either before or after the meeting, each of the directors not present provides a waiver of notice, a consent to holding the meeting, or an approval of the minutes in writing. The waiver of notice or consent need not specify the purpose of the meeting. All waivers, consents and approvals shall be filed with the corporate records or made a part of the minutes of the meeting. Notice of a meeting

shall also be deemed given to any director who attends the meeting without protesting the lack of adequate notice before the meeting or at its commencement.

Section 11. Quorum. A majority of the total number of directors then in office shall constitute a quorum, provided that in no event shall the required quorum be less than one-fifth of the authorized number of directors or two directors, whichever is larger. The act of a majority of the directors present at a meeting at which a quorum is present shall be the act of the Board of Directors, except as otherwise provided in Article III, Sections 5 (filling board vacancies), 6 (removing directors) and 12 (taking action without a meeting); Article IV, Section 1 (appointing Board Committees); Article VI, Section 3 (approving self-dealing transactions); Article VII, Section 2 (approving indemnification); and Article VIII, Section 6 (amending Bylaws), of these Bylaws or in the California Nonprofit Public Benefit Corporation Law. A meeting at which a quorum is initially present may continue to transact business notwithstanding the withdrawal of directors, if any action taken is approved by at least a majority of the required quorum for such meeting.

Section 12. Action Without a Meeting. Any action required or permitted to be taken by the Board may be taken without a meeting if all members of the Board shall individually or collectively consent to such action in writing. Such written consents shall be filed with the minutes of the proceedings of the Board, and shall have the same force and effect as the unanimous vote of such directors.

Section 13. Telephone and Electronic Meetings. Directors may participate in a meeting through use of conference telephone, electronic video screen communication, or other electronic transmission in compliance with Article VIII, Section 5 of these Bylaws so long as all of the following apply:

(a) each director participating in the meeting can communicate with all of the other directors concurrently, and

(b) each director is provided with the means of participating in all matters before the Board, including the capacity to propose, or to interpose an objection to, a specific action to be taken by the corporation.

Section 14. Standard of Care.

A. General. A director shall perform the duties of a director, including duties as a member of any Board Committee on which the director may serve, in good faith, in a manner such director believes to be in the best interest of this corporation and with such care, including reasonable inquiry, as an ordinarily prudent person in a like situation would use under similar circumstances.

In performing the duties of a director, a director shall be entitled to rely on information, opinions, reports, or statements, including financial statements and other financial data, in each case prepared or presented by:

(i) one or more officers or employees of this corporation whom the director believes to be reliable and competent as to the matters presented;

(ii) counsel, independent accountants, or other persons as to matters which the director believes to be within such person's professional or expert competence; or

(iii) a Board Committee upon which the director does not serve, as to matters within its designated authority, provided that the director believes such Committee merits confidence;

so long as in any such case, the director acts in good faith after reasonable inquiry when the need therefor is indicated by the circumstances and without knowledge that would cause such reliance to be unwarranted.

Except as provided in Article VI below, a person who performs the duties of a director in accordance with this Section shall have no liability based upon any failure or alleged failure to discharge that person's obligations as a director, including, without limiting the generality of the foregoing, any actions or omissions which exceed or defeat a public or charitable purpose to which a corporation, or assets held by it, are dedicated.

B. Investments. Except with respect to assets held for use or used directly in carrying out this corporation's public or charitable activities, in investing, reinvesting, purchasing or acquiring, exchanging, selling, and managing this corporation's investments, the Board shall avoid speculation, looking instead to the permanent disposition of the funds, considering the probable income as well as the probable safety of this corporation's capital. No investment violates this section where it conforms to provisions authorizing such investment contained in an instrument or agreement pursuant to which the assets were contributed to this corporation.

Section 15. Inspection. Every director shall have the absolute right at any reasonable time to inspect and copy all books, records, and documents, and to inspect the physical properties of this corporation.

Section 16. Director Compensation. The Board may authorize the advance or reimbursement to a director of actual reasonable expenses incurred in carrying out his or her duties as a director, such as for attending meetings of the Board and Board Committees.

Section 17. Executive Compensation Review. The Board of Directors (or a Board Committee) shall review any compensation packages (including all benefits) of the President or the chief executive officer and the Treasurer or chief financial officer, regardless of job title, and such other officers as may be required by law or which shall be so designated by resolution of the Board of Directors from time to time, and shall approve such compensation only after determining that the compensation is just and reasonable. This review and approval shall occur when such officer is hired, when the term of employment of such officer is renewed or extended, and when the compensation of such officer is modified, unless the modification applies to substantially all of the employees of this corporation.

## ARTICLE IV
## COMMITTEES

Section 1. Board Committees. The Board of Directors may, by resolution adopted by a majority of the directors then in office, create any number of Board Committees, each consisting of two or more directors, and only of directors, to serve at the pleasure of the Board. Appointments to any Board Committee shall be by a majority vote of the directors then in office. Board Committees may be given all the authority of the Board, except for the powers to:

(a) set the number of directors within a range specified in these Bylaws;

(b) elect directors or remove directors without cause;

(c) fill vacancies on the Board of Directors or on any Board Committee;

(d) fix compensation of directors for serving on the Board or any Board Committee;

(e) amend or repeal these Bylaws or adopt new Bylaws;

(f) adopt amendments to the Articles of Incorporation of this corporation;

(g) amend or repeal any resolution of the Board of Directors which by its express terms is not so amendable or repealable;

(h) create any other Board Committees or appoint the members of any Board Committees; or

(i) approve any merger, reorganization, voluntary dissolution, or disposition of substantially all of the assets of this corporation.

Section 2. Advisory Committees. The Board of Directors may establish one or more Advisory Committees to the Board. The members of any Advisory Committee may consist of directors or non-directors and may be appointed as the Board determines. Advisory committees may not exercise the authority of the Board to make decisions on behalf of this corporation, but shall be restricted to making recommendations to the Board or Board Committees, and implementing Board or Board Committee decisions and policies under the supervision and control of the Board or Board Committee.

Section 3. Audit Committee. For any tax year in which this corporation has gross revenues of $2 million or more, this corporation shall have an Audit Committee whose members shall be appointed by the Board of Directors, and who may include both directors and non-directors, subject to the following limitations: (a) a majority of the members of the Audit Committee may not consist of members of the Finance Committee, if any; (b) the chair of the Audit Committee may not be a member of the Finance Committee, if any; (c) the Audit

Committee may not include any member of the staff or the President or Treasurer; (d) the Audit Committee may not include any person who has a material financial interest in any entity doing business with this corporation; and (e) Audit Committee members who are not directors may not receive compensation greater than the compensation paid to directors for their Board service.

If the Audit Committee is composed and appointed as required by Section 1 above (concerning Board Committees), it shall be deemed a Board Committee on which the other directors are entitled to rely as provided in Article III, Section 14 of these Bylaws; otherwise, the Board of Directors shall remain responsible for oversight and supervision of the Audit Committee as an Advisory Committee.

The Audit Committee shall: (1) recommend to the Board of Directors the retention and, when appropriate, the termination of an independent certified public accountant to serve as auditor, (2) negotiate the compensation of the auditor on behalf of the Board, (3) confer with the auditor to satisfy the Audit Committee members that the financial affairs of this corporation are in order, (4) review and determine whether to accept the audit, and (5) approve performance of any non-audit services provided to this corporation by the auditor's firm.

Section 4. Meetings.

A. Of Board Committees. Meetings and actions of Board Committees shall be governed by and held and taken in accordance with the provisions of Article III of these Bylaws concerning meetings and actions of the Board of Directors, with such changes in the content of those Bylaws as are necessary to substitute the Board Committee and its members for the Board of Directors and its members. Minutes shall be kept of each meeting of any Board Committee and shall be filed with the corporate records.

B. Of Advisory Committees. Subject to the authority of the Board of Directors, Advisory Committees may determine their own meeting rules and whether minutes shall be kept.

The Board of Directors may adopt rules for the governance of any Board or Advisory Committee not inconsistent with the provisions of these Bylaws.

## ARTICLE V
## OFFICERS

Section 1. Officers. The officers of this corporation shall be a President, a Vice President, a Secretary, and a Treasurer. The corporation may also have, at the discretion of the directors, such other officers as may be appointed by the Board of Directors. Any number of offices may be held by the same person, except that neither the Secretary nor the Treasurer may serve concurrently as the President of the Board, if any. The chief executive officer of this corporation shall also be an officer of the Board but may not hold the office of President of the Board. The President shall be elected from among the directors of the corporation and must remain a director to be eligible to continue to serve as President.

Section 2. Election. Except for the initial officers appointed by the incorporator, the officers of this corporation shall be elected annually by the Board of Directors, and each shall serve at the pleasure of the Board, subject to the rights, if any, of an officer under any contract of employment.

Section 3. Removal. Subject to the rights, if any, of an officer under any contract of employment, any officer may be removed, with or without cause, by the Board of Directors or by an officer on whom such power of removal may be conferred by the Board of Directors.

Section 4. Resignation. Any officer may resign at any time by giving written notice to this corporation. Any resignation shall take effect on receipt of that notice by any other officer than the person resigning or at any later time specified by that notice and, unless otherwise specified in that notice, the acceptance of the resignation shall not be necessary to make it effective. Any resignation is without prejudice to the rights, if any, of this corporation under any contract to which the officer is a party.

Section 5. Vacancies. A vacancy in any office for any reason shall be filled in the same manner as these Bylaws provide for election to that office.

Section 6. President. The President shall preside at all meetings of the Board of Directors and shall have such other powers and duties as may be prescribed by the Board or these Bylaws.

Section 7. Vice President. The Vice President shall, in the absence of the President, carry out the duties of the President and shall have such other powers and duties as may be prescribed by the Board or these Bylaws.

Section 8. Secretary. The Secretary shall supervise the keeping of a full and complete record of the proceedings of the Board of Directors and its committees, shall supervise the giving of such notices as may be proper or necessary, shall supervise the keeping of the minute books of this corporation, and shall have such other powers and duties as may be prescribed by the Board or these Bylaws.

Section 9. Treasurer. The Treasurer shall be the chief financial officer of this corporation and shall supervise the charge and custody of all funds of this corporation, the deposit of such funds in the manner prescribed by the Board of Directors, and the keeping and maintaining of adequate and correct accounts of this corporation's properties and business transactions, shall render reports and accountings as required, and shall have such other powers and duties as may be prescribed by the Board or these Bylaws.

## ARTICLE VI
## CERTAIN TRANSACTIONS

Section 1. Loans. Except as permitted by Section 5236 of the California Nonprofit Public Benefit Corporation Law, this corporation shall not make any loan of money or property to, or guarantee the obligation of, any director or officer; provided, however, that this corporation may advance money to a director or officer of this corporation or any subsidiary for expenses reasonably anticipated to be incurred in performance of the duties of such director or officer so long as such individual would be entitled to be reimbursed for such expenses absent that advance.

Section 2. Self-Dealing Transactions. Except as provided in Section 3 below, the Board of Directors shall not approve, or permit the corporation to engage in, any self-dealing transaction. A self-dealing transaction is a transaction to which this corporation is a party and in which one or more of its directors has a material financial interest, unless the transaction comes within California Corporations Code Section 5233(b).

Section 3. Approval. This corporation may engage in a self-dealing transaction if the transaction is approved by a court or by the Attorney General. This corporation may also engage in a self-dealing transaction if the Board determines, before the transaction, that (a) this corporation is entering into the transaction for its own benefit; (b) the transaction is fair and reasonable to this corporation at the time; and (c) after reasonable investigation, the Board determines that it could not have obtained a more advantageous arrangement with reasonable effort under the circumstances. Such determinations must be made by the Board in good faith, with knowledge of the material facts concerning the transaction and the director's interest in the transaction, and by a vote of a majority of the directors then in office, without counting the vote of the interested director or directors.

Where it is not reasonably practicable to obtain approval of the Board before entering into a self-dealing transaction, a Board Committee may approve such transaction in a manner consistent with the requirements above; provided that, at its next meeting, the full Board determines in good faith that the Board Committee's approval of the transaction was consistent with the requirements above and that it was not reasonably practical to obtain advance approval by the full Board, and ratifies the transaction by a majority of the directors then in office without the vote of any interested director.

## ARTICLE VII
## INDEMNIFICATION AND INSURANCE

Section 1. Right of Indemnity. To the fullest extent allowed by Section 5238 of the California Nonprofit Public Benefit Corporation Law, this corporation may indemnify its agents, in connection with any proceeding, and in accordance with Section 5238. For purposes of this Article, "agent" shall have the same meaning as in Section 5238(a), including directors, officers, employees, other agents, and persons formerly occupying such positions; "proceeding" shall have the same meaning as in Section 5238(a), including any threatened action or

investigation under Section 5233 or brought by the Attorney General; and "expenses" shall have the same meaning as in Section 5238(a), including reasonable attorneys' fees.

Section 2. Approval of Indemnity. On written request to the Board of Directors in each specific case by any agent seeking indemnification, to the extent that the agent has been successful on the merits, the Board shall promptly authorize indemnification in accordance with Section 5238(d). Otherwise, the Board shall promptly determine, by a majority vote of a quorum consisting of directors who are not parties to the proceeding, whether, in the specific case, the agent has met the applicable standard of conduct stated in Section 5238(b) or Section 5238(c), and, if so, may authorize indemnification to the extent permitted thereby.

Section 3. Advancing Expenses. The Board of Directors may authorize the advance of expenses incurred by or on behalf of an agent of this corporation in defending any proceeding prior to final disposition, if the Board finds that:

(a) the requested advances are reasonable in amount under the circumstances; and

(b) before any advance is made, the agent will submit a written undertaking satisfactory to the Board to repay the advance unless it is ultimately determined that the agent is entitled to indemnification for the expenses under this Article.

The Board shall determine whether the undertaking must be secured, and whether interest shall accrue on the obligation created thereby.

Section 4. Insurance. The Board of Directors may adopt a resolution authorizing the purchase of insurance on behalf of any agent against any liability asserted against or incurred by the agent in such capacity or arising out of the agent's status as such, and such insurance may provide for coverage against liabilities beyond this corporation's power to indemnify the agent under law.

## ARTICLE VIII
## MISCELLANEOUS

Section 1. Fiscal Year. The fiscal year of this corporation shall end each year on June 30.

Section 2. Contracts, Notes, and Checks. All contracts entered into on behalf of this corporation must be authorized by the Board of Directors or the person or persons on whom such power may be conferred by the Board from time to time, and, except as otherwise provided by law, every check, draft, promissory note, money order, or other evidence of indebtedness of this corporation shall be signed by the person or persons on whom such power may be conferred by the Board from time to time.

Section 3. Annual Reports to Directors. Within 120 days after the end of this corporation's fiscal year, the President shall furnish a written report to all directors of this corporation containing the following information:

(a) the assets and liabilities, including the trust funds of this corporation, as of the end of the fiscal year;

(b) the principal changes in assets and liabilities, including trust funds, during the fiscal year;

(c) the revenue or receipts of this corporation, both unrestricted and restricted to particular purposes, for the fiscal year;

(d) the expenses or disbursements of this corporation, for both general and restricted purposes, for the fiscal year; and

(e) any transaction during the previous fiscal year involving more than $50,000 between this corporation (or its parent or subsidiaries, if any) and any of its directors or officers (or the directors or officers of its parent or subsidiaries, if any) or any holder of more than ten percent of the voting power of this corporation or its parent or subsidiaries, if any, or any of a number of such transactions in which the same person had a direct or indirect material financial interest, and which transactions in the aggregate involved more than $50,000, as well as the amount and circumstances of any indemnifications or advances aggregating more than $10,000 paid during the fiscal year to any director or officer of this corporation. For each transaction, the report must disclose the names of the interested persons involved in such transaction, stating such person's relationship to this corporation, the nature of such person's interest in the transaction and, where practicable, the value of such interest.

The foregoing report shall be accompanied by any report thereon of independent accountants or, if there is no such report, the certificate of an authorized officer of this corporation that such statements were prepared without an audit from the books and records of this corporation. The report and any accompanying material may be sent by electronic transmission in compliance with Article VIII, Section 5 of these Bylaws.

Section 4. Required Financial Audits. This corporation shall obtain a financial audit for any tax year in which it receives or accrues gross revenue of $2 million or more, excluding grant or contract income from any governmental entity for which the governmental entity requires an accounting. Whether or not they are required by law, any audited financial statements obtained by this corporation shall be made available for inspection by the Attorney General and the general public within nine months after the close of the fiscal year to which the statements relate, and shall remain available for three years (1) by making them available at this corporation's principal, regional, and district offices during regular business hours and (2) either by mailing a copy to any person who so requests in person or in writing or by posting them on this corporation's website.

Section 5. Electronic Transmissions. Unless otherwise provided in these Bylaws, and subject to any guidelines and procedures that the Board of Directors may adopt from time to time, the terms "written" and "in writing" as used in these Bylaws include any form of recorded message in the English language capable of comprehension by ordinary visual means, and may include electronic transmissions, such as facsimile or email, provided (i) for electronic transmissions *from* the corporation, the corporation has obtained an unrevoked written consent from the recipient to the use of such means of communication; (ii) for electronic transmissions *to* the corporation, the corporation has in effect reasonable measures to verify that the sender is the individual purporting to have sent such transmission; and (iii) the transmission creates a record that can be retained, retrieved, reviewed, and rendered into clearly legible tangible form.

Section 6. Amendments. Proposed amendments to these Bylaws shall be submitted in writing to the directors at least one week in advance of any Board meeting at which they will be considered for adoption. The vote of a majority of the directors then in office or the unanimous written consent of the directors shall be required to adopt a bylaw amendment.

Section 7. Governing Law. In all matters not specified in these Bylaws, or in the event these Bylaws shall not comply with applicable law, the California Nonprofit Public Benefit Corporation Law as then in effect shall apply.

CERTIFICATE OF SECRETARY

I certify that I am presently the duly elected and acting Secretary of Education for Change, a California nonprofit public benefit corporation, and that the above Bylaws, consisting of twelve pages, are the Bylaws of this corporation as adopted by the board of directors on April 19th, 2005.

DATED: April 19th, 2005

Desten Broach, Secretary

2718971

# State of California

## SECRETARY OF STATE

I, *Kevin Shelley*, Secretary of State of the State of California, hereby certify:

That the attached transcript of 1 page(s) has been compared with the record on file in this office, of which it purports to be a copy, and that it is full, true and correct.

***IN WITNESS WHEREOF,*** I execute this certificate and affix the Great Seal of the State of California this day of

FEB - 2 2005

Kevin Shelley

Secretary of State

Sec/State Form CE-107 (rev. 1/03)

OSP 03 80510

2718971

ARTICLES OF INCORPORATION
OF
EDUCATION FOR CHANGE

ENDORSED - FILED
In the office of the Secretary of State
of the State of California

JAN 21 2005

KEVIN SHELLEY
Secretary of State

ARTICLE I

The name of this corporation is Education for Change.

ARTICLE II

A. This corporation is a nonprofit public benefit corporation and is not organized for the private gain of any person. It is organized under the California Nonprofit Public Benefit Corporation Law for charitable purposes.

B. The specific and primary purpose of this corporation is to engage in charitable and educational activities within the meaning of Section 501(c)(3) of the Internal Revenue Code of 1986, as amended, or the corresponding provisions of any future United States internal revenue law (the "Code").

ARTICLE III

The name and address in this state of this corporation's initial agent for the service of process is Desten Broach, 485 Boulevard Way, Oakland, CA 94610.

ARTICLE IV

A. This corporation is organized and operated exclusively for exempt purposes within the meaning of Section 501(c)(3) of the Code. Notwithstanding any other provision of these Articles, this corporation shall not carry on any activities not permitted to be carried on (1) by a corporation exempt from federal income tax under Section 501(c)(3) of the Code, or (2) by a corporation, contributions to which are deductible under Sections 170(c)(2), 2055(a)(2), 2106(a)(2)(A)(ii), 2522(a)(2), or 2522(b)(2) of the Code.

B. Except as permitted by law, no substantial part of the activities of this corporation shall consist of the carrying on of propaganda or otherwise attempting to influence legislation, nor shall this corporation participate in, or intervene in (including the

publication or distribution of statements), any political campaign on behalf of or in opposition to any candidate for public office.

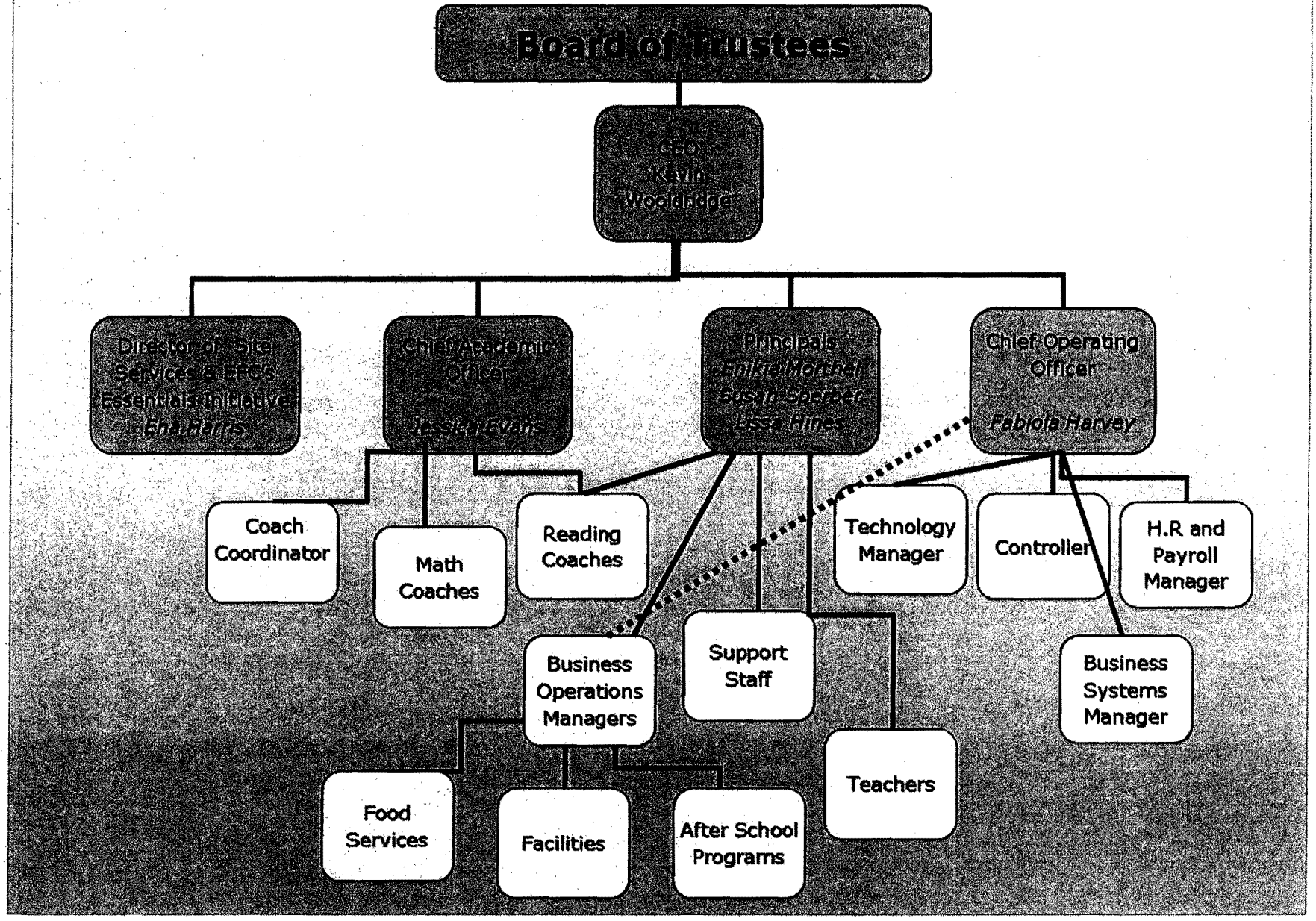
## ARTICLE V

The property of this corporation is irrevocably dedicated to charitable purposes, and no part of the net income or assets of this corporation shall ever inure to the benefit of any director, officer, or member, if any, of this corporation, or any other private person. Upon the winding up and dissolution of this corporation and after paying or adequately providing for the debts and obligations of this corporation, the remaining assets shall be distributed to a nonprofit fund, foundation, or corporation which is organized and operated exclusively for charitable purposes and that has established its tax-exempt status under Section 501(c)(3) of the Code.

DATED: January 20, 2005

Desten Broach, Incorporator

# Education for Change (as of July 1, 2009)



Education for Change

# Teacher Performance Rubric

| AREA OF PROFICIENCY | | MIDTERM REVIEW | FINAL REVIEW |
|---|---|---|---|
| Program Implementation | **OCR**<br>Teacher is effectively implementing the instructional program<br>Follows lesson planner and pacing guide<br>Effectively implements routines and procedures<br>Pace of instruction is effective<br>There is a consistent high level of student engagement<br>Instructional goals are evident and instruction consistently supports those goals<br>Instructional dialogue is, clear, efficient and academically rigorous<br>ALL students consistently read at all appropriate times a Workshop implementation supports program goals and differentiates instruction based on student need<br>Assessment results are used to differentiate instruction<br>The sections of OCR are delivered in the suggested time frame<br>There is consistent effective on-going management of student work product | **RATING:** | **RATING:** |
| | **MATH**<br>Teacher follows structure of the EFC program with appropriate use of enhancements, routines and procedures<br>All key elements of the EFC Math Program are evident<br>Follows pacing guide<br>Uses routines and procedures<br>Pace of instruction is effective<br>There is a consistent high level of student engagement<br>Instructional goals are evident and instruction consistently supports those goals<br>Assessment results are used to differentiate instruction<br>There is consistent effective on –going management of student work product | **RATING:** | **RATING:** |
| | **ELD** | **RATING:** | **RATING:** |

Teacher provides appropriate instruction in which specific language structures are taught
Instruction addresses listening, speaking, reading and writing
Differentiated language structures are taught
Pace of instruction is effective
There is a consistent high level of student engagement
Instruction effectively supports learning in other core subject areas
Assessment results are used to differentiate instruction
There is consistent effective on-going management of student work product

| | | | |
|---|---|---|---|
| | | RATING: | RATING: |
| **High Expectation for Student Work Quality** | All student work is held to a high standard Systems are in places to monitor, review and provide feedback to students on an on-going basis<br>Clear systems are in place to control for student error<br>Teacher understands grade appropriate rigor | | |
| | | RATING: | RATING |
| **Student Behavior Management** | High expectations are set and systematically reinforced<br>There is clarity in the system to manage student behavior<br>Teacher is comfortable setting limits in classroom<br>Teacher is a cheerleader and a motivator for students<br>Teacher models appropriate interactions with students | | |
| | | RATING | RATING: |
| **Classroom Environment and Organization** | Classroom is organized and maintain to support the implementation of the EFC instructional program<br>Classroom is well organized and visually pleasing<br>Classroom is free of unnecessary distractions<br>Organizational systems support instruction and allow for easy transitions<br>Student work is appropriately displayed<br>Environment reflects school pride and the importance of learning<br>Students and teacher share responsibility for maintaining learning environment | | |
| | | RATING: | RATING: |
| **General EFC Norms** | **Demonstrates high level of professionalism**<br>• Strives to be positive and self-reflective<br>• Provides productive feedback<br>• Sets high standard for self, focused on effectiveness not minimum requirements<br>• Proactive problem-solver focused on solutions<br>• Consistently punctual<br>• Meets deadlines and adheres to timelines<br>• High degree of focused "on-task" behavior | | |

**Excellent attendance**

- Goal: 98%

RATING:

RATING:

**Professional Development**

- High Level of Engagement
- Content is reflected in practice

RATING:

RATING:

**Collaboration**

- Teacher is a team supporter and leader
- Always shares responsibility for group effectiveness and success
- Seeks to share load and maintain curriculum focus
- Always works collaboratively and is driven by student need
- Focused on how grade level and organization as a whole can be most successful

RATING:

RATING:

MIDTERM

Name of Evaluator _____ Name of Evaluated _____

OVERALL PROFICIENCY LEVEL

____

_____ _____

Date _____ Date _____

FINAL

Name of Evaluator _____ Name of Evaluated _____

OVERALL PROFICIENCY LEVEL

_____ _____

_____

Date _____ Date _____

## RATINGS:

### 4 – ADVANCED

This rating indicates that the standard of performance consistently is at the highest level and/or exceeds what is outlined by the quality descriptors which are listed under each area of review. At this level, performance reflects the quality which should be used as a model for others and instructional practice is completely in line with the EFC instructional model. An extremely high degree of rigor and effective differentiation should be highly evident at this level. Clear achievement data must support a rating at this level.

### 3 – PROFICIENT

This rating indicates that the standard of performance consistently meets the quality descriptors which are listed under each area of review. At this level, instructional practice is clearly in line with the EFC instructional model.

### 2 – DEVELOPING

This rating indicates that the standard of performance is approaching that which is outlined by the quality descriptors which are listed under each area of review. At this level of performance, practice needs to be refined in some area(s). There is a clear commitment to refinement of practice and deeper implementation of the EFC instructional model. Typically this would be the most common rating for new teachers. More experienced teachers who have not advanced to a rating of 3 or higher should be given very specific feedback and support to ensure improvement of performance.

### 1 – INSUFFICIENT

This rating indicates a standard of performance far from approaching what is outlined by the quality descriptors which are listed under each area of review. At this level, intense support is needed to support improvement of performance and/or commitment to the EFC instructional model.

# Education For Change

## Principal Focused Performance Evaluation

☐ Self Evaluation
☐ Midterm Evaluation
● Final Evaluation

Name _____ Site _____

Job Title _____ Level of Experience _____

Evaluator _____ Date _____

**Employment Action Recommendation**

_____ Bonus Review _____ Continue in Current Assignment with an Improvement Plan

_____ Continue in Current Assignment _____ Release from Current Assignment

**Ratings: 1 lowest to 4 highest – required for all sub areas under each general heading. Any area rated below three is inadequate and cause for a focused improvement plan.**

**GENERAL LEADERSHIP**

____**Demonstrates high degree of ownership for all outcomes and operations**
____**Clearly identifiable and effective lead of setting appropriate EFC standard for ALL**
____**Has a "no excuse" orientation**
____**Appropriately communicates sense of urgency**

☐ **UNSATISFACTORY** ☐ **NEEDS IMPROVEMENT** ☐ **SATISFACTORY** ☐ **EXCELS**

**ACADEMIC/INSTRUCTIONAL MANAGEMENT**

_____**Has clearly organized, and fully implemented plan to provide appropriate supervision, support and effective feedback to maximize teacher performance**
_____**Effectively prioritizes efforts to maximize student achievement**
_____**Promotes high standards for standards for student achievement**

☐ **UNSATISFACTORY** ☐ **NEEDS IMPROVEMENT** ☐ **SATISFACTORY** ☐ **EXCELS**

____Makes duties and responsibilities clear for all employees
____Provides each employee with a very clear understanding of how s/he is performing
____Has clearly identified areas of development for each employee
____Gives timely feedback on regular basis to all each employee
____Provides training and/or coaching and support for all employees
____Uses evaluation system including improvement plans appropriately

☐ UNSATISFACTORY ☐ NEEDS IMPROVEMENT ☐ SATISFACTORY ☐ EXCELS

OPERATIONS MANAGEMENT

____Ensures there are clear systems and procedures for smooth efficient operations
____Ensures routines and procedure are clear and used consistently as appropriate
____Leads on going planning, communication and appropriate monitoring
____Ensures systems are designed to effectively support primary school functions

☐ UNSATISFACTORY ☐ NEEDS IMPROVEMENT ☐ SATISFACTORY ☐ EXCELS

UDENT SAFETY AND BEHAVIOR MANAGEMENT

____Effectively supports a high standard of student behavior, a positive learning environment and provides appropriate behavioral intervention
____Appropriate systems to support and ensure adequate student supervision
____Effectively communicates and enforces appropriate school rules
____Provides training, monitoring, feedback and/or coaching to ensure appropriate an effective interactions with students
____Promotes and models high standard for student behavior in and out of classrooms

☐ UNSATISFACTORY ☐ NEEDS IMPROVEMENT ☐ SATISFACTORY ☐ EXCELS

ATTENDANCE MANAGEMENT

____Monitors and actively manages student attendance
____Ensures systems and procedures in place to maximize student attendance
____Ensures SART and other intervention processes operating effectively

☐ UNSATISFACTORY ☐ NEEDS IMPROVEMENT ☐ SATISFACTORY ☐ EXCELS

**ORGANIZATION, TIMELY FOLLOW THROUGH AND ORIENTATION TO DETAIL AND ACCURACY**

____Effectively tracks and manages duties
____Responses to obligations, communications and planning within effective time ranges
____Completes tasks appropriately with a high degree of accuracy and on time
____Follows through on commitments made to all members of the EFC community
____Arrives Punctually to all meetings, activities and events

☐ UNSATISFACTORY ☐ NEEDS IMPROVEMENT ☐ SATISFACTORY ☐ EXCELS

**INTERPERSONAL SKILLS AND ATTITUDE**

____Demonstrates a high level of Professionalism
____Drives plans and actions based on what's best for all students not (filtered by personal needs or wishes)
____Receives and responds constructive critical feedback appropriately
____Interacts with others with a high degree of appropriateness and effectiveness
____Builds rapport and open lines of communication with all stakeholders

☐ UNSATISFACTORY ☐ NEEDS IMPROVEMENT ☐ SATISFACTORY ☐ EXCELS

**OVERALL RATING- Level of self-sufficiency and effectiveness as individual manager**

☐ UNSATISFACTORY ☐ NEEDS IMPROVEMENT ☐ SATISFACTORY ☐ EXCELS

General Comments

Evaluator's Signature _____ Title _____ Date _____

Employee's Signature _____ Title _____ Date _____

Employee May Attach Comments

Home Office Review

Reviewer _____ Title _____ Date _____

# IMPROVEMENT PLAN

Employee _____ Evaluator _____

Job Title _____ Site _____

Area of Improvement: _____

To be measured by: _____

Review Dates: _____ _____ _____

Progress Report _____

_____

_____

Area of Improvement: _____

To be measured by: _____

Review Dates: _____ _____ _____

Progress Report _____

_____

_____

Area of Improvement: _____

To be measured by: _____

Review Dates: _____ _____ _____

Progress Report _____

_____

_____

# Education For Change

## Classified Employee Performance Evaluation

☐ Fall Bi Annual Evaluation ☐ Spring Bi Annual Evaluation ☐ Special Evaluation

Name _____ Site _____

Job Title _____ Level of Experience _____

Evaluator _____ Date _____

**Employment Action Recommendation**

_____ Promote/Raise Level of Responsibility at Earliest Opportunity _____ Continue in Current Assignment with an Improvement Plan

_____ Continue in Current Assignment _____ Release from Current Assignment

**QUALITY OF WORK**

☐ UNSATISFACTORY ☐ NEEDS IMPROVEMENT ☐ SATISFACTORY ☐ EXCELS

**-Accuracy**

**QUANTITY OF WORK**

☐ UNSATISFACTORY ☐ NEEDS IMPROVEMENT ☐ SATISFACTORY ☐ EXCELS

**-Total Output**
**-Meeting Deadlines**

**KNOWLEDGE AND SKILLS**

☐ UNSATISFACTORY ☐ NEEDS IMPROVEMENT ☐ SATISFACTORY ☐ EXCELS

**-General Knowledge in Field of Work**
**-Site and Task Specific**

**INTERPERSONAL SKILLS AND ATTITUDE**

☐ UNSATISFACTORY ☐ NEEDS IMPROVEMENT ☐ SATISFACTORY ☐ EXCELS

**-Communication Skills**
**-Courtesy**
**-Cooperation**
**-Maturity**

**ORGANIZATIONAL ORIENTATION**

☐ UNSATISFACTORY ☐ NEEDS IMPROVEMENT ☐ SATISFACTORY ☐ EXCELS

- Team orientation
- Collaborative Work Focus
- Cross Role Support

**LEVEL OF SUPERVISION NEEDED**

☐ UNSATISFACTORY ☐ NEEDS IMPROVEMENT ☐ SATISFACTORY ☐ EXCELS

- Judgment
- Ability to Plan and Organize Work

**PROACTIVE NATURE**

☐ UNSATISFACTORY ☐ NEEDS IMPROVEMENT ☐ SATISFACTORY ☐ EXCELS

-Self Motivation
-Takes Initiative

General Comments

_____

_____

_____

Evaluator's Signature _____ Title _____ Date _____

Employee's Signature _____ Title _____ Date _____

Employee May Attach Comments

Home Office Review

Reviewer _____ Title _____ Date _____

# IMPROVEMENT PLAN

Employee _____ Evaluator _____

Job Title _____ Site _____

Area of Improvement: _____

To be measured by: _____

Review Dates: _____ _____ _____

Progress Report _____

_____

_____

Area of Improvement: _____

To be measured by: _____

Review Dates: _____ _____ _____

Progress Report _____

_____

_____

Area of Improvement: _____

To be measured by: _____

Review Dates: _____ _____ _____

Progress Report _____

_____

_____

Result of Final Plan Review

____ Satisfactory improvement made. Monitoring and feedback to continue through normal evaluation cycle.

_____ Recommendation for Release

Evaluator _____ Date _____ Evaluatee _____ Date _____

# Education for Change FY 2010-11 Unaudited Projection

| REVENUES: | COX 10-11 | WORLD 10-11 | ACHIEVE 10-11 | HOME OFF 10-11 | TOTAL |
|---|---|---|---|---|---|
| Block Grant- General Purpose | $ 1,785,940.44 | $ 1,553,282.52 | $ 759,244 | $ - | $ 4,098,467 |
| State Categorical Block Grant | $ 539,629.98 | $ 479,561.16 | $ 246,279 | $ - | $ 1,265,470 |
| Property Tax Revenue | $ 840,443.28 | $ 730,956.48 | $ 357,292 | $ - | $ 1,928,691 |
| State Lottery | $ 67,358.76 | $ 55,444.14 | $ 25,805 | $ - | $ 148,608 |
| Other State Revenue | $ 21,906.54 | $ 97,773.12 | $ 24,160 | $ - | $ 143,839 |
| Federal Revenue | $ 490,817.88 | $ 439,738.32 | $ 208,565 | $ 61,200 | $ 1,200,321 |
| Contributions | $ 125,000.00 | $ - | $ - | $ 25,000 | $ 150,000 |
| Class Size Reduction | $ 399,827.76 | $ 506,882.88 | $ - | $ - | $ 906,711 |
| Other Local Revenue (Home Office Fees) | $ 2,040.00 | $ 3,060.00 | $ 2,240 | $ 1,388,220 | $ 1,395,560 |
| Total Unrestricted Revenues | $ 4,272,965 | $ 3,866,699 | $ 1,623,584 | $ 1,474,420 | $ 11,237,667 |
| **EXPENSES:** | | | | | |
| Certificated Salaries | $ 1,951,579.26 | $ 1,714,101.84 | $ 625,034 | $ 621,237 | $ 4,911,952 |
| Classified Salaries | $ 444,864.84 | $ 322,607.64 | $ 131,059 | $ 250,618 | $ 1,149,150 |
| Employee Benefits | $ 705,392.22 | $ 566,214.24 | $ 215,561 | $ 312,518 | $ 1,799,685 |
| Books and Supplies | $ 170,000.00 | $ 172,032.18 | $ 98,991 | $ 21,420 | $ 462,443 |
| Services and Other Operating Expenses | $ 1,279,000.00 | $ 1,278,535.32 | $ 630,977 | $ 344,250 | $ 3,532,762 |
| Capital Expenses and Depreciation | $ - | $ - | $ - | $ 7,650 | $ 7,650 |
| Total Expenses | $ 4,550,836 | $ 4,053,491 | $ 1,701,621 | $ 1,557,693 | $ 11,863,642 |
| Change in Unrestricted Net Assets | $ (277,872) | $ (186,793) | $ (78,037) | $ (83,273) | $ (625,974) |
| Beginning unrestricted net assets | $ 1,271,105 | $ 2,098,515 | $ 571,945 | $ 1,425,740 | $ 5,367,305 |
| Restatement of beginning net assets | $ - | $ - | $ - | $ - | $ - |
| Beginning unrestricted net assets, restated | $ 1,151,142 | $ 2,061,838 | $ 538,929 | $ 1,425,740 | $ 5,177,649 |
| Ending unrestricted net assets | **$ 993,233** | **$ 1,911,722** | **$ 493,908** | **$ 1,342,467** | **$ 4,741,331** |

**FY10-11 PROJECTION**

# Education For Change FY 2011-12 Unaudited Projection

| REVENUES: | COX 11-12 | WORLD 11-12 | ACHIEVE 11-12 | HOME OFF 11-12 | TOTAL |
|---|---|---|---|---|---|
| Block Grant- General Purpose | $1,821,659 | $ 1,584,348 | $ 774,429 | $ - | $ 4,180,436 |
| State Categorical Block Grant | $ 550,423 | $ 489,152 | $ 251,205 | $ - | $ 1,290,780 |
| Property Tax Revenue | $ 857,252 | $ 745,576 | $ 364,438 | $ - | $ 1,967,265 |
| State Lottery | $ 68,706 | $ 56,553 | $ 26,321 | $ - | $ 151,580 |
| Other State Revenue | $ 22,345 | $ 99,729 | $ 24,643 | $ - | $ 146,716 |
| Federal Revenue | $ 500,634 | $ 448,533 | $ 212,736 | $ 62,424 | $ 1,224,327 |
| Contributions | $ 127,500 | $ - | $ - | $ 25,500 | $ 153,000 |
| Class Size Reduction | $ 407,824 | $ 517,021 | $ - | $ - | $ 924,845 |
| Other Local Revenue (Home Office Fees) | $ 2,081 | $ 3,121 | $ 2,285 | $ 1,415,984 | $ 1,423,471 |
| Total Unrestricted Revenues | $4,358,424 | $ 3,944,033 | $ 1,656,056 | $ 1,503,908 | $11,462,421 |
| **EXPENSES:** | | | | | |
| Certificated Salaries | $1,990,611 | $ 1,748,384 | $ 637,534 | $ 633,662 | $ 5,010,191 |
| Classified Salaries | $ 453,762 | $ 329,060 | $ 133,680 | $ 255,631 | $ 1,172,133 |
| Employee Benefits | $ 719,500 | $ 577,539 | $ 219,872 | $ 318,768 | $ 1,835,679 |
| Books and Supplies | $ 170,000 | $ 175,473 | $ 100,971 | $ 21,848 | $ 468,292 |
| Services and Other Operating Expenses | $1,279,000 | $ 1,304,106 | $ 643,597 | $ 351,135 | $ 3,577,838 |
| Capital Expenses and Depreciation | $ - | $ - | $ - | $ 7,803 | $ 7,803 |
| Total Expenses | $4,612,873 | $ 4,134,561 | $ 1,735,654 | $ 1,588,847 | $12,071,934 |
| Change in Unrestricted Net Assets | $ (254,449) | $ (190,528) | $ (79,598) | $ (84,938) | $ (609,514) |
| Beginning unrestricted net assets | $ 993,233 | $ 1,911,722 | $ 493,908 | $ 1,342,467 | $ 4,741,330 |
| Restatement of beginning net assets | $ - | $ - | $ - | $ - | $ - |
| Beginning unrestricted net assets, restated | $ 993,233 | $ 1,911,722 | $ 493,908 | $ 1,342,467 | $ 4,741,330 |
| Ending unrestricted net assets | **$ 738,784** | **$ 1,721,194** | **$ 414,310** | **$ 1,257,529** | **$ 4,131,816** |

**FY 11-12 PROJECTION**

# Education for Change FY 2012-13 Unaudited Projection

| REVENUES: | COX 12-13 | WORLD 12-13 | ACHIEVE 12-13 | HOME OFF 12-13 | TOTAL |
|---|---|---|---|---|---|
| Block Grant- General Purpose | $1,858,092 | $ 1,616,035 | $ 789,918 | $ - | $ 4,264,045 |
| State Categorical Block Grant | $ 561,431 | $ 498,935 | $ 256,229 | $ - | $ 1,316,595 |
| Property Tax Revenue | $ 874,397 | $ 760,487 | $ 371,726 | $ - | $ 2,006,611 |
| State Lottery | $ 70,080 | $ 57,684 | $ 26,848 | $ - | $ 154,612 |
| Other State Revenue | $ 22,792 | $ 101,723 | $ 25,136 | $ - | $ 149,650 |
| Federal Revenue | $ 510,647 | $ 457,504 | $ 216,991 | $ 63,672 | $ 1,248,814 |
| Contributions | $ 130,050 | $ - | $ - | $ 26,010 | $ 156,060 |
| Class Size Reduction | $ 415,981 | $ 527,361 | $ - | $ - | $ 943,342 |
| Other Local Revenue (Home Office Fees) | $ 2,122 | $ 3,184 | $ 2,330 | $ 1,444,304 | $ 1,451,941 |
| Total Unrestricted Revenues | $4,445,592 | $ 4,022,913 | $ 1,689,177 | $ 1,533,987 | $11,691,669 |
| **EXPENSES:** | | | | | |
| Certificated Salaries | $2,030,423 | $ 1,783,352 | $ 650,285 | $ 646,335 | $ 5,110,394 |
| Classified Salaries | $ 462,837 | $ 335,641 | $ 136,354 | $ 260,743 | $ 1,195,575 |
| Employee Benefits | $ 733,890 | $ 589,089 | $ 224,269 | $ 325,144 | $ 1,872,392 |
| Books and Supplies | $ 170,000 | $ 178,982 | $ 102,990 | $ 22,285 | $ 474,258 |
| Services and Other Operating Expenses | $1,279,000 | $ 1,330,188 | $ 656,469 | $ 358,158 | $ 3,623,814 |
| Capital Expenses and Depreciation | $ - | $ - | $ - | $ 7,959 | $ 7,959 |
| Total Expenses | $4,676,151 | $ 4,217,252 | $ 1,770,367 | $ 1,620,624 | $12,284,393 |
| Change in Unrestricted Net Assets | $ (230,558) | $ (194,339) | $ (81,190) | $ (86,637) | $ (592,724) |
| Beginning unrestricted net assets | $ 738,784 | $ 1,721,194 | $ 414,310 | $ 1,257,529 | $ 4,131,816 |
| Restatement of beginning net assets | $ - | $ - | $ - | $ - | $ - |
| Beginning unrestricted net assets, restated | $ 738,784 | $ 1,721,194 | $ 414,310 | $ 1,257,529 | $ 4,131,816 |
| Ending unrestricted net assets | **$ 508,226** | **$ 1,526,855** | **$ 333,120** | **$ 1,170,891** | **$ 3,539,092** |

**FY 12-13 PROJECTION**

# Education For Change FY 2013-14 Unaudited Projection

| REVENUES: | COX 13-14 | WORLD 13-14 | ACHIEVE 13-14 | HOME OFF 13-14 | TOTAL |
|---|---|---|---|---|---|
| Block Grant- General Purpose | $1,895,254 | $ 1,648,356 | $ 805,716 | $ - | $ 4,349,326 |
| State Categorical Block Grant | $ 572,660 | $ 508,914 | $ 261,353 | $ - | $ 1,342,927 |
| Property Tax Revenue | $ 891,885 | $ 775,697 | $ 379,161 | $ - | $ 2,046,743 |
| State Lottery | $ 71,482 | $ 58,838 | $ 27,384 | $ - | $ 157,704 |
| Other State Revenue | $ 23,247 | $ 103,758 | $ 25,638 | $ - | $ 152,644 |
| Federal Revenue | $ 520,860 | $ 466,654 | $ 221,330 | $ 64,946 | $ 1,273,790 |
| Contributions | $ 132,651 | $ - | $ - | $ 26,530 | $ 159,181 |
| Class Size Reduction | $ 424,300 | $ 537,908 | $ - | $ - | $ 962,209 |
| Other Local Revenue (Home Office Fees) | $ 2,165 | $ 3,247 | $ 2,377 | $ 1,473,190 | $ 1,480,979 |
| Total Unrestricted Revenues | $4,534,504 | $ 4,103,372 | $ 1,722,960 | $ 1,564,666 | $11,925,502 |
| **EXPENSES:** | | | | | |
| Certificated Salaries | $2,071,032 | $ 1,819,019 | $ 663,291 | $ 659,262 | $ 5,212,602 |
| Classified Salaries | $ 472,094 | $ 342,354 | $ 139,081 | $ 265,958 | $ 1,219,487 |
| Employee Benefits | $ 748,568 | $ 600,871 | $ 228,755 | $ 331,646 | $ 1,909,840 |
| Books and Supplies | $ 170,000 | $ 182,562 | $ 105,050 | $ 22,731 | $ 480,343 |
| Services and Other Operating Expenses | $1,279,000 | $ 1,356,792 | $ 669,598 | $ 365,321 | $ 3,670,711 |
| Capital Expenses and Depreciation | $ - | $ - | $ - | $ 8,118 | $ 8,118 |
| Total Expenses | $4,740,694 | $ 4,301,597 | $ 1,805,774 | $ 1,653,036 | $12,501,101 |
| Change in Unrestricted Net Assets | $ (206,189) | $ (198,226) | $ (82,814) | $ (88,370) | $ (575,599) |
| Beginning unrestricted net assets | $ 508,226 | $ 1,526,855 | $ 333,120 | $ 1,170,891 | $ 3,539,092 |
| Restatement of beginning net assets | $ - | $ - | $ - | $ - | $ - |
| Beginning unrestricted net assets, restated | $ 508,226 | $ 1,526,855 | $ 333,120 | $ 1,170,891 | $ 3,539,092 |
| Ending unrestricted net assets | **$ 302,037** | **$ 1,328,629** | **$ 250,307** | **$ 1,082,521** | **$ 2,963,493** |

**FY13-14 PROJECTION**

# Education For Change FY 2014-15 Unaudited Projections

| REVENUES: | COX 14-15 | WORLD 14-15 | ACHIEVE 14-15 | HOME OFF 14-15 | TOTAL |
|---|---|---|---|---|---|
| Block Grant- General Purpose | $1,933,159 | $ 1,681,323 | $ 821,830 | $ - | $ 4,436,313 |
| State Categorical Block Grant | $ 584,113 | $ 519,092 | $ 266,580 | $ - | $ 1,369,786 |
| Property Tax Revenue | $ 909,723 | $ 791,211 | $ 386,744 | $ - | $ 2,087,678 |
| State Lottery | $ 72,911 | $ 60,015 | $ 27,932 | $ - | $ 160,858 |
| Other State Revenue | $ 23,712 | $ 105,833 | $ 26,151 | $ - | $ 155,696 |
| Federal Revenue | $ 531,277 | $ 475,987 | $ 225,757 | $ 66,245 | $ 1,299,266 |
| Contributions | $ 135,304 | $ - | $ - | $ 27,061 | $ 162,365 |
| Class Size Reduction | $ 432,786 | $ 548,666 | $ - | $ - | $ 981,453 |
| Other Local Revenue (Home Office Fees) | $ 2,208 | $ 3,312 | $ 2,425 | $ 1,502,654 | $ 1,510,599 |
| Total Unrestricted Revenues | $4,625,194 | $ 4,185,439 | $ 1,757,420 | $ 1,595,960 | $12,164,012 |
| **EXPENSES:** | | | | | |
| Certificated Salaries | $2,112,452 | $ 1,855,399 | $ 676,556 | $ 672,447 | $ 5,316,854 |
| Classified Salaries | $ 481,536 | $ 349,201 | $ 141,862 | $ 271,277 | $ 1,243,876 |
| Employee Benefits | $ 763,539 | $ 612,889 | $ 233,330 | $ 338,279 | $ 1,948,037 |
| Books and Supplies | $ 170,000 | $ 186,213 | $ 107,151 | $ 23,186 | $ 486,550 |
| Services and Other Operating Expenses | $1,279,000 | $ 1,383,928 | $ 682,990 | $ 372,627 | $ 3,718,545 |
| Capital Expenses and Depreciation | $ - | $ - | $ - | $ 8,281 | $ 8,281 |
| Total Expenses | $4,806,527 | $ 4,387,629 | $ 1,841,889 | $ 1,686,097 | $12,722,143 |
| Change in Unrestricted Net Assets | $ (181,333) | $ (202,190) | $ (84,470) | $ (90,137) | $ (558,131) |
| Beginning unrestricted net assets | $ 302,037 | $ 1,328,629 | $ 250,307 | $ 1,082,521 | $ 2,963,493 |
| Restatement of beginning net assets | $ - | $ - | $ - | $ - | $ - |
| Beginning unrestricted net assets, restated | $ 302,037 | $ 1,328,629 | $ 250,307 | $ 1,082,521 | $ 2,963,493 |
| Ending unrestricted net assets | **$ 120,703** | **$ 1,126,438** | **$ 165,837** | **$ 992,384** | **$ 2,405,363** |

**FY14-15 PROJECTION**

**Education for Change, Cox Academy**

**5-Year Budget Assumptions Narrative**

The following assumptions are unaudited statements based on the current financial position of Education for Change, Cox Academy. They are accurate to the best of the current information available as of November, 2009.

1. Cox Academy will maintain current enrollment projected through Fiscal Year 2014-2015 with very little fluctuation.
2. The average daily attendance number is budgeted at 94%, which is conservative given the history of Cox consistently exceeding this number.
3. Cox Academy will continue to serve the targeted student population which is approximately 96% Free and Reduced Lunch students, 69% English Language Learners and 4% Special Education students.
4. The school operates a school schedule of 175 instructional days and 5 days of Supplemental Hourly Instruction.
5. Cox Academy runs Class Size reduction for grades K-3 with no current plan to incur overage penalties.
6. Cox Academy has budgeted for an estimated 2% annual increase in all State funding each year beginning in 2010-2011.
7. General Purpose block grant numbers as well as the Charter Categorical block grant numbers are based on June 1st, 2009 CSDC Charter Currents Article written by Eric Premack.
8. Federal revenues include Title I, Title II, Title III and Title IV. It was assumed that Title I would continue to be funded at the rates projected for 2009-10, as it is believed there will be no major impact in future years given the Federal Governments wish to continue supporting at risk schools at current funding levels.
9. Cox Academy qualifies for the National School Lunch Program (NSLP) as certified by the California Department of Education (CDE). Cox Academy uses San Lorenzo Unified as a Lunch Provider. The estimate of these costs is based on historical actuals. The lunch program is budgeted for $65 per student.
10. Cox Academy has an after school academic and enrichment program which includes reading, math and literature two days a week and includes sports, computer science, art, drama and design two days a week.
11. Cox Academy pays encroachment to Oakland Unified School District for providing Special Education services to students. This is budgeted at approximately $500 per student.
12. Cox Academy pays rent to OUSD at the rate of $1.00 per square foot plus a deficit reduction amount of about $200 per student.
13. The average teacher salary is estimated at $55,920 based on existing staff average with a 2% increase built in for each year.
14. Cox Academy employs one Principal and one Assistant Principal.

15. Cox Academy provides STRS benefits to certificated staff.
16. Cox Academy provides PERS benefits for classified staff.
17. Cox Academy estimates the annual benefit cost per employee to be $9,200. This also calculated to increase 2% each year.
18. Workmen's compensation rate is calculated at 3.8% of total salaries.
19. Cox Academy estimates Books and Supplies costs at $315 per student.
20. Cox Academy has a computer lab which is used primarily for the after school program. New computers will need to be purchased as the need arises.
21. Cox Academy allocates one laptop to each teacher. New computers will need to be purchased as the need arises.
22. Cox Academy budgets $195,000 for educational consultants as well as for community outreach consultants and custodial vendors. The need for these consultants and vendors is projected to drop in the future budget years as we have built capacity with existing staff and the need to train will be handled more by internal staff going forward.
23. Cox Academy estimates a need of substitute teachers at $35,000 per year based on the four plus year history of need.
24. Maintenance and repair for the site is budgeted at $.80 per square foot.
25. The need to fundraise at $125,000 for Cox Academy beginning in the 2010-2011 school year is projected. This will allow for a smaller dip into the reserves without having to make staff cuts. It would also allow for maintaining the Class Size reduction without any penalties.

**ESSENTIALS LIST:**
**CEO**

- **Provide** regular on-going verbal and written feedback and coaching to all administrative staff to ensure ESSENTIALS drive all decision making and meeting EFC standard
- **Work strategically** with the Chief Academic Officer to ensure we are effectively and consistently supporting administrators and teachers to maximize the quality of instruction and therefore student academic outcomes
- **Work strategically** with the Director of Business and Finance to ensure on-going fiscal health of the organization
- **Work strategically** with the Director of Essentials Initiative to ensure we actively seek staff input and respond appropriately to maximize work conditions and organizational effectiveness
- **Engage** all stakeholders in promoting a deeper understanding of and support for EFC's mission
- **Work strategically** with the Home Office Staff to ensure service oriented support for school sites
- **Work strategically** with the EFC Board to implement policies and regulations to provide support, clarity and direction for our mission
- **Work strategically** to strengthen existing relationships and establish new relationships with the funding community

**CONSISTENT FOLLOW THROUGH, HIGH STANDARDS AND NO EXCUSES EQUAL SUCCESS**

**ESSENTIALS LIST:**
**CAO**

- **Work Strategically** with the CEO to ensure we are effectively and consistently supporting administrators and teachers to maximize the quality of instruction and therefore student academic outcomes
- **Provide** regular on-going instructional coaching to all administrators
- **Work Strategically** with the Literacy Coordinator and Math Coordinator to ensure high quality professional development for teachers and administrators throughout the school-year **and in the summer.**
- **Work Strategically** with the Coach Coordinator and all the Coaches to ensure high quality coaching for all instructional staff
- **Provide** regular, ongoing verbal and written feedback to the Coach Coordinator and Math and Intervention Coordinator
- **Ensure** that Education For Change staff has high quality benchmark assessments, online data analysis resources (OARS), and training in how to effectively use data to improve instruction
- **Work Strategically** with Math Coordinator to plan the curriculum, pacing, assessment, and analysis of data for the before and after school intervention programs.
- **Coordinate and Provide** support for beginning teachers through the BTSA program.
- **Work Strategically** with the CEO to develop instruction or data presentations for the EFC Board
- **Work Strategically** with the DBF to develop a budget for Curriculum and Instruction.

- **Ensure** that all classrooms have the required core textbooks and materials
- **Work Strategically** with assigned site administrators to meet all requirements of Team Accountability Initiative

**CONSISTENT FOLLOW THROUGH, HIGH STANDARDS AND NO EXCUSES EQUAL SUCCESS**

**ESSENTIALS LIST:**
**COO**

- **Manage** all operational matters and is accountable for the overall success of business operations
- **Strategically** plan the allocation of financial and human resources
- **Supervise** and coach the department managers
- **Formulate** policies and procedures to ensure sound business operations
- **Assist** the CEO and the Board of Directors in strategic planning
- **Set** goals for management and refines the mechanisms for communication between all departments
- **Develop** annual goals and objectives based on organizational principles
- **Support** and strategically plan with the leadership team and key managers to insure that all major activities are aligned with the EFC mission

**CONSISTENT FOLLOW THROUGH, HIGH STANDARDS AND NO EXCUSES EQUAL SUCCESS**

**ESSENTIALS LIST:**
**DIRECTOR OF ESSENTIALS INITIATIVE**

- **Support** and monitor activities related to EFC Essentials initiative
- **Provide** effective vehicle to ongoing data gathering for employee satisfaction and parent/community satisfaction (Dine and Delve, CEO luncheons, etc)
- **Plan,** support and conduct EFC Leadership Council meetings
- **Work strategically** with EFC school administrators on team accountability structures
- **Plan** and support all State testing mandates
- **Support** all EFC MAA related activities
- **Support** and plan EFC RIF activities
- **Collaborate** as a part of the EFC Instructional Team to support all professional development and curricular areas of focus
- **Collaborate** with the CEO to plan and strategically implement EFC Initiatives
- **Respond** to formal and informal complaints as needed
- **Monitor** SART and SARB activities and convene Disciplinary Hearing Panels as needed
- **Supervise,** evaluate and hire CEP's and monitor and support and evaluate their performance
- **Supervise** daily assignments of CEP's and the call-in substitute system
- **Plan** and convene and support team building and EFC wide celebrations

**CONSISTENT FOLLOW THROUGH, HIGH STANDARDS AND NO EXCUSES**
**EQUAL SUCCESS**

**ESSENTIALS LIST:**
**CONTROLLER**

- **Manage** accounting database and financials including Accounts Payable, Accounts Receivable, Cash receipts, the General Ledger including all Bank and investment account monthly reconciliations and the monthly payroll upload from ADP.
- **Prepare** financial statements and reports for the Board, State, County, District, Auditors and Donors.
- **Insure** timely submission for State Teachers Retirement System reporting and deposits to the County.
- **Track** Federal and State restricted revenues and expenditures and the associated Compliance and reporting requirements.
- **Prepare** and distribute Vendor 1099's by the IRS deadline and file the appropriate 1096 document to the IRS.
- **Work** strategically with the Director of Finance and Operations to prepare the organizational budget and the monitoring of actuals against the budget to confirm reserve targets are being met.
- **Manage** the procurement system including issuance of Purchase Orders from the Budget Managers and Office Managers and vendor creation and vendor files management as well as asset management and depreciation.
- **Provide** outside auditors all requested documentation at audit as well as all information required to prepare the IRS 990 form and the California State Form 199.
- **Manage** strategically with the Chief Operations Officer all company insurance policies as well as any claims not related to workman's compensation.
- **Create**, where appropriate, written policies related to Finance and Operations.
- **Manage** the fraud reporting requirements for the Organization.

- **Manage** PowerSchool and all related reporting requirements.
- **Strategically** manage and maintain phone system along with the Technology Manager.

**CONSISTENT FOLLOW THROUGH, HIGH STANDARDS AND NO EXCUSES EQUAL SUCCESS**

**ESSENTIALS LIST:**
**BUSINESS SYSTEMS MANAGER**

- **Work collaboratively** with the Controller to manage the PowerSchool database and requisite reporting.
- **Work** collaboratively with the Controller to manage all revenues.
- **Work** collaboratively with the Controller to manage the AptaFund database and requisite reporting.
- **Reconcile** all credit card transactions.
- **Process** payables, reimbursements and bank debits.
- **Create** monthly STRS report for County submission.
- **Create** and maintain vendor files.
- **Maintain** voucher files and batch files.
- **Reconcile** site petty cash and food service bank accounts.

**CONSISTENT FOLLOW THROUGH, HIGH STANDARDS AND NO EXCUSES EQUAL SUCCESS**

**ESSENTIALS LIST:**
**HR AND OPERATIONAL MANAGER**

- **Maintain** well organized and accurate personnel records; including credential status and requirements
- **Maintain** an organized and inviting office environment
- **Ensure** for the timely and accurate input of information for payroll maintenance and payroll submission
- **Be** proactive in problem solving areas where improvements can be made to increase effectiveness and efficiency in company operations
- **Work strategically** with the Home Office staff to ensure service oriented support for school sites
- **Ensure** that HR compliance and hiring issues are implemented effectively and efficiently
- **Maintain** well organized benefits information and submit information in a timely manner, eg. STRS, CalPers,etc
- **Work strategically** with Finance and Operations to maximize the quality of support to ensure student academic success

**CONSISTENT FOLLOW THROUGH, HIGH STANDARDS AND NO EXCUSES EQUAL SUCCESS**

**ESSENTIALS LIST:**
**COACH COORDINATOR**

- **Work Strategically** with the CAO and CEO to ensure we are effectively and consistently supporting administrators and teachers to maximize the quality of instruction and therefore student academic outcomes
- **Work Strategically** with the CAO and CEO to design, develop, and present high quality professional development for teachers, Instructional Leadership Team members, and administrators throughout the school-year and in the summer.
- **Provide** on-going observational feedback, training and coaching support to Reading Coaches to ensure high quality coaching for all instructional staff
- **Provide** professional development for Reading Coaches during the bi-monthly Reading Coach meetings
- **Assist** in the data analysis of the English Language Arts data
- **Provide** Administrators with instructional coaching support

**CONSISTENT FOLLOW THROUGH, HIGH STANDARDS AND NO EXCUSES**
**EQUAL SUCCESS**

**ESSENTIALS LIST:**
**MATHEMATICS COORDINATOR**

- **Work** strategically with the Chief Academic Officer to ensure effective and consistent coordination and implementation of all aspects of EFC's mathematics program.
- **Create** and facilitate effective and timely professional development for teachers, ILT, and administrators that has a direct positive impact on classroom instruction by incorporating collaborative work among colleagues, training on best practices, and increasing mathematical content knowledge.
- **Ensure** teachers have the adopted curriculum and other needed materials (assessments, manipulative, resources) to be able to fully implement the mathematics instructional program.
- **Provide** teachers with highly focused coaching support with the intention of improving instructional delivery (observational feedback, demo lessons, cognitive planning support) and student engagement.
- **Provide** a user friendly analysis of mathematics data through the correlation of assessments with the California state standards, curriculum, instruction, and the OARS reporting system.
- **Promote** a deeper mathematical content knowledge for all stakeholders so that they may provide additional mathematics support for all students (family university night, parent meetings, ACCLAIM).
- **Lead** the development and implementation of the before and after school intervention program.

**CONSISTENT FOLLOW THROUGH, HIGH STANDARDS AND NO EXCUSES EQUAL SUCCESS**

**ESSENTIALS LIST:**
**PRINCIPAL**

- **Keep** current with observations and feedback
- **Lead** PD and teacher development at your site supported by Home Office staff
- **Be** adequately prepared and organized to engage in on-going progress discussions (with complete and accurate documentation) on where each teacher is in his/her development while making sure that this is consistently and clearly communicated to **each** and **every** teacher
- **Be** clear with classified staff about what the EFC standard is and support them and give them on-going feedback so they reach and maintain it
- **Set** and reinforce an appropriate high standard of behavior for **all** students... i.e. make it clear that all rules will be followed; make it clear that at EFC adults do not make requests multiple times to achieve compliance; adults do not try to talk over children's voices
- **Hold** on-going planning meetings with appropriate staff members to ensure good communication, smooth operations and a high degree of efficiency
- **Maintain** the same standard for EFC students that you do for your own children/relatives
- **Come** to the table focused on how we can make this happen

**CONSISTENT FOLLOW THROUGH, HIGH STANDARDS AND NO EXCUSES EQUAL SUCCESS**

**ESSENTIALS LIST:**
**COACH**

- **Work Strategically** with EFC's Instructional Leadership Team to help ensure that EFC's instructional program is delivered consistently and effectively.
- **Provide** high quality coaching including verbal feedback and support in strategic cognitive planning to all assigned teachers to maximize their instructional capacity.
- **Consistently** coach all teachers to help them maintain a positive, organized and productive learning environment that enables them to maintain the highest standards and expectations in all student interactions.
- **Work Strategically** with the use of the data both formal and informal to coach teachers on strategies for differentiation to ensure homogenous outcomes for all students.
- **Actively engage and collaborate** with teachers encouraging on-going, open and consistent dialogue and self reflection.
- **Be** exceptionally prepared and organized to engage in on-going discussions around Professional Development that strategically targets and differentiates the diverse needs of assigned EFC teachers.
- **Focus** on continuous self development to ensure every effort is made to model, demonstrate, promote and support the highest leverage instructional practice for ALL EFC students.

**CONSISTENT FOLLOW THROUGH, HIGH STANDARDS AND NO EXCUSES**
**EQUAL SUCCESS**

**ESSENTIALS LIST:**
**CEP TEACHER**

- **Consistently** deliver EFC's instructional program with a high level of student engagement
- **Consistently** implement the teacher's plans for the day
- **Engage** in on-going collaborative work with colleagues to strengthen EFC's ability to deliver high level homogenous outcomes for all students
- **Be** self reflective and always strive to get better at the craft of teaching
- **Consistently** hold all students to high standards of work and behavior
- **Maintain** open and effective lines of communication with all stakeholders
- **Maintain** a positive, organized and productive learning environment
- **Provide** intervention for students after school that will increase student achievement

**CONSISTENT FOLLOW THROUGH, HIGH STANDARDS AND NO EXCUSES EQUAL SUCCESS**

**ESSENTIALS LIST:**
**SUPPORT SPECIALIST I - ATTENDANCE**

- **Work strategically and effectively** with site administrators to effectively manage and monitor student attendance
- **Work effectively** with office personnel and teachers to maintain accurate attendance records
- **Monitor** attendance on a daily basis and place and log calls for absent students
- **Monitor** attendance data on a weekly basis to appropriately plan home visits
- **Keep** current with the most up to date Power School information and training
- **Coordinate** SART notifications and subsequent meetings
- **Work** directly with administration to ensure attendance information is disseminated and understood
- **Work** strategically with site administrators to ensure that tardy students are in class in a timely manner
- **Coordinate**, monitor and maintain Independent Study contracts
- **Coordinate and Support** Student Study Team meetings
- **Maintain** high standards for all students
- **Provide** afterschool intervention instruction in afterschool program
- **Work** directly with SSA's and site administration to ensure that all areas are covered for appropriate student supervision

**CONSISTENT FOLLOW THROUGH, HIGH STANDARDS, AND NO EXCUSES**
**EQUAL SUCCESS**

**ESSENTIALS LIST:**
**SUPPORT SPECIALIST II - BEHAVIOR AND SUPERVISION**

- **Promote** EFC's 6 P's
- **Work with** site administrators to provide supervision and behavior support for students
- **Help maintain** student referral documentation
- **Assist with** the development, implementation and monitoring of student behavior plans
- **Work with** site administrators to support student recognition activities
- **Work with** BOM to support afterschool intervention program
- **Help maintain** communication with parents about behavior issues, including participation in SST's as appropriate
- **Support** management of student detention
- **Serve** as a behavior model

**CONSISTENT FOLLOW THROUGH, HIGH STANDARDS AND NO EXCUSES EQUAL SUCCESS**

**ESSENTIALS LIST**
**SSA I & SSA II**

- **Provide** regular on-going support to teachers by filling all copy, supply, laminating and poster orders in a timely manner.
- **Work with** the Office Manager to inventory supplies, manage copy orders and provide other assistance as needed.
- **Support** ongoing communication, including walkie-talkies on at all times.
- **Ensure** safety of students by being visible and providing active supervision on and around school grounds and securing and monitoring all exits.
- **Provide** library services for the school as assigned.
- **Work directly** with the Principal to insure smooth school operation and the promotion of a high achieving school environment.
- **Provide** assistance, as needed, for all after school programs.
- **Work strategically** with the Principal in order to provide safety for school site.
- **Check** periodically to make certain that all gates and doors are locked.
- **Help Maintain** an appropriate standard of behavior for all students.
- **Model** appropriate behavior for all EFC students and community members.
- **Provide** support for parent communication as required.

**CONSISTENT FOLLOW THROUGH, HIGH STANDARDS AND NO EXCUSES**
**EQUAL SUCCESS**

**ESSENTIALS LIST:**
**CAFETERIA MANAGER**

- **Maintain** well organized and accurate records including Cafeteria Workers Time sheets, inventories, cash deposit receipts, etc.
- **Maintain** MealTime database that is clean and up to date with all student information and their status.
- **Ensure** that all lunch applications have been completed properly and turned in for status verification.
- **Complete** all reports in an accurate and timely manner including, MealTime weekly and monthly reports, low balance reports, etc.
- **Provide** adequate guidance and support for cafeteria staff.
- **Maintain** an organized inviting office environment.
- **Ensure** that all food service supplies are adequately stocked and inventoried to be always available.
- **Be** proactive in problem solving areas where improvements can be made to increase effectiveness and efficiency in cafeteria.
- **Help** hold students who enter the cafeteria to an appropriate standard of behavior.

**CONSISTENT FOLLOW THROUGH, HIGH STANDARDS AND NO EXCUSES**
**EQUAL SUCCESS**

**ESSENTIALS LIST:**
**FOOD SERVICES WORKER**

- **Prepare** and serve food during breakfast and lunch periods.
- **Operate** appropriate food service equipment which may include oven, warmer, refrigerator, freezer, wrapping machine, etc.
- **Retrieve** student information from computer terminal and assist with organizing student lunch cards.
- **Maintain** high standards of cleanliness and sanitation at all food services areas daily.
- **Create** a positive atmosphere and rapport with students, parents and staff members.
- **Work** collaboratively with cafeteria manager and other staff members in delivering quality food services to our students.

**CONSISTENT FOLLOW THROUGH, HIGH STANDARDS AND NO EXCUSES**
**EQUAL SUCCESS**

**ESSENTIALS LIST:**
**EFC CUSTODIAN**

- **Consistently** maintain the EFC building in good physical condition with a clean and neat appearance.
- **Thoroughly** clean the building, (including dust mopping floors, aligning furniture, vacuuming carpets and entryway rugs, cleaning drinking fountains, dusting horizontal surfaces, wiping furniture, dumping garbage, cleaning windows, spot cleaning walls, replacing light bulbs, taking out garbage, checking and replacing paper towels, toilet paper and hand soap as needed, cleaning urinals and stalls, clean sinks and mirrors, wet mop floor using hot water and appropriate cleaning solution, flush floor drain with hot soapy water, pick-up litter and straightening-up as needed.
- **Adequately** prepare for all school events, make sure things are neat and clean, coordinating with appropriate staff to ensure appropriate special arrangements.
- **Check** furnace filters monthly throughout heating and air conditioning season.
- **Consistently** monitor the condition of the building and advise the BOMs or principal when repairs need to be done.
- **Determine** type of supplies and equipment necessary for specific cleaning tasks.
- **Order** supplies and maintain inventory of supplies.
- **Follow** fire safety procedures and regulations.
- **Check** security system of building; ensure all windows and doors are locked.
- **Identify** cleaning problems and determine appropriate remedies.
- **Maintain** open and effective lines of communication with all stakeholders
- **Maintain** a positive, organized and productive learning environment

- **Help** unload, move, deliver and/or arrange materials, supplies and furniture as needed

- **Model** and promote appropriate behavior for students and the EFC community

**CONSISTENT FOLLOW THROUGH HIGH STANDARDS AND NO EXCUSES EQUAL SUCCESS**

# *2009-2010 EFC Board Meeting Calendar:*

| MEETING DATE: | TOPICS: |
|---|---|
| September 16, 2009 | • *CST Data*<br>• *Staffing Report*<br>• *PD Report*<br>• *Standard Report (CEO and ADA)* |
| December 3, 2009 | • *Financial Report*<br>• *ELA Benchmark Data Report*<br>• *Standard Report (CEO and ADA)* |
| January 21, 2010 | • *Consolidated Application II*<br>• *Satisfaction Surveys*<br>• *Financial Report*<br>• *LEA Plans for Approval*<br>• *PD Update*<br>• *Standard Report (CEO and ADA)*<br>• *Audit Report* |
| April 22, 2010 | • *Financial Report*<br>• *Math and ELA Benchmark Data Report*<br>• *Standard Report (CEO and ADA)* |
| June 10, 2010 | • *New FY Budget Adoption*<br>• *Spring Satisfaction Surveys*<br>• *Summer Professional Development Plan*<br>• *Standard Report (CEO and ADA)*<br>• *Staffing Report*<br>• *Consolidated Application I* |

**Desten Alexander Broach**
126 Dracena Avenue
Piedmont, CA 94611
M: 650-248-6644 H: 510-891-1336
destenb@gmail.com

## QUALIFICATIONS

- Extensive B2B software product management/marketing experience
- Strong leadership and management skills with experience in leading teams across matrix organizations and managing complex product development and marketing processes.
- Excellent marketing skills with experience in customer needs assessment, product specification and delivery, outbound marketing and sales activities and developing and managing relationships with external partners.

## Experience

### Sun Microsystems/iPlanet e-Commerce Solutions — Menlo Park, CA

**Product Line Marketing Manager, OEM Strategy, SW Infrastructure** — Sept 06 – Apr 09

Lead development and implementation of the original equipment manufacturer (OEM) strategy across Sun's software infrastructure (middleware) product group. Influenced product roadmaps to increase OEM offerings and lead outbound marketing and sales support activities.

- Key driver behind 21% increase in SW infrastructure OEM revenues while overall Sun revenues increased only 6%. Key driver behind 300% increase in SW infrastructure OEM design wins.
- Developed SW positioning, communications, and go to market activities for the OEM market.
- Lead product management/marketing efforts that resulted in a co-development and co-marketing agreement between Sun and Ericsson A.B. for a significant new communications middleware product.
- Drove development and launch of Sun OEM SW website: **http://www.sun.com/software/oem/index.jsp**

**Group Product Marketing Mgr., Java Web Services Integration Products** — Mar 00 – Sept 06

Manager and individual contributor in Sun's enterprise SW product management and marketing group focused on the business integration, web services, and SOA markets.

- Lead team of product managers through 15 different product releases. Responsible for group business strategy and product line direction; coaching and development of direct reports; development of product management tools, processes, and best practices; interface to upper management and cross functional departments.
- Personally managed 6 different products through 9 release cycles, from writing product requirements documents (PRD) through release to manufacturing (RTM), public launch, marketing and sales support.
- Proposed, designed, and executed program to migrate 300+ customers representing over $15mm in revenue from three of Sun's mature middleware products to next generation products.
- Successfully delivered a strategy to terminate in-house development of software application adapters and instead partner with a third party provider. Increased number of adapter available by 5X while reducing Sun cost by over 75%.

### Netscape Communications/iPlanet e-Commerce Solutions — Mtn. View, CA

**Senior Product Manager, Application Server Division** — Jan 99 - Mar 00

Overall management and ownership responsibility for Netscape Process Manager, Netscape Application Server for SAP R/3 and Java Messaging Service product.

- Repositioned Process Manager product for the high growth, high margin enterprise integration market by developing requirements and leading the product team to expand the

product's back end integration and business process management capabilities.

- Shipped Process Manager 4.0 and 6.0.

**Senior Marketing Manager, Enterprise Product Marketing Division** Apr 98- Dec 98

Managed outbound marketing of the Netscape Process Manager product. Responsibilities included product positioning and pricing, analyst and press relations, production of marketing and sales collateral, sales training and support.

- Launched Process Manager 1.0. Developed positioning, pricing, and primary marketing messages.
- Developed complete marketing and sales collateral and tools for Process Manager 1.0 product including press and analyst presentations, customer sales presentation, product data sheet, product white paper, competitive guide, product demo, and extensive product reviewer's guide.
- Conducted briefings with industry analysts and press outlets for the launch.

## Intuit Inc. Mtn. View, CA

**Senior Marketing Manager** Aug 96 - Oct 97

Overall responsibility for channel marketing of Quicken and QuickBooks Online Banking to Intuit's 45 U.S. Bank partners. Managed team of 5 in the development and delivery of cooperative marketing programs, marcom, and product support materials.

- Managed Launch of Quicken 98 on-line banking to 45 U.S. Bank partners.
- Designed and executed direct mail, rebate coupon, direct email, other marketing programs.
- Negotiated deals for cooperative marketing expenditures with 7 banks.

## U.S. Senator David Pryor Washington, DC

**Legislative Aide; Banking, Judiciary, Education & Housing issues** June 89 – Jan 93

**Staff Director, Defense Industry & Technology Conversion Task Force** Jan 93 – May 94

- Led 24 member cross-functional team that developed federal programs stimulating U.S. technology development, deployment, and industrial competitiveness.
- Managed legislative development of Technology Reinvestment Project providing over $600 million annually to businesses in Federal R&D.

## Mercer Management Consulting Washington, DC

**Research Analyst for Business Strategy Consulting Firm** June 87- June 89

- Analyzed business problems and recommended solutions to Fortune 200 clients.
- Conducted competitive analysis of clinical laboratory industry by performing field interviews of clients, customers, and competitors, resulting in $6 million expansion project.
- Researched and evaluated potential takeover candidates for a $700 million merger offer for a top five U.S. food service company.

## Boards

## Education for Change Public Schools Oakland, CA

**Chairman of the Board** 2004- Current

- Charter School Management Organization operating 3 Oakland public elementary schools

## Education

**Stanford University Graduate School of Business** Palo Alto, CA

MBA June, 1996

**Duke University** Durham, NC

BA in economics, *Magna Cum Laude, Phi Beta Kappa,* May, 1987

Oxford University, Junior year abroad, Oxford, U.K.

Jeffrey Liaw
TPG Capital
345 California Street STE 3300
San Francisco, CA 94104
O: (415) 743 – 1693
E: jliaw@tpg.com

**Professional**

2005 – Current TPG Capital San Francisco, CA

*Member of TPG's North American Buyouts Group, focused on the firm's industrials and power investing efforts*

- Responsible for sourcing and completing investments on behalf of the firm, including due diligence processes, financing, negotiations, regulatory approvals, etc.
- Co-led ~$200mm investment in Armstrong World Industries, a leading building products franchise, in August of 2009
- Co-led acquisition and subsequent mergers to form Graphic Packaging, a NYSE-listed packaging company, in March 2008. Member of the board of directors.
- Co-led acquisition of TXU, one of the largest U.S. integrated power companies, in October 2007. Member of the board of directors.
- Member of the board of directors of Oncor Electric Delivery, one of the largest electricity transmission and distribution companies in the U.S.

2001 – 2003 Bain Capital New York, NY

*Member of Bain Capital's industrial investing team*

1999 – 2001 Boston Consulting Group San Francisco, CA

*Associate, focused on telecom and financial services sectors*

**Education**

2003 – 2005 Harvard Business School Boston, MA

*MBA, Baker Scholar and Siebel Scholar, class co-president*

1995 – 1999 University of Texas Austin, TX

*BA, Phi Beta Kappa, Liberal Arts Honors program (Plan II), emphasis on literature*
*BBA, Beta Gamma Sigma, Finance and Business Honors Program*
*Fraternity president*
*Intramural basketball and softball champion*

**Other**

- Board member, Education for Change, an Oakland-based charter school system
- Enjoy running, basketball, tennis, golf, and music

# JONATHAN SCHORR

897 Glendome Circle
Oakland, Calif. 94602

Phone: (510) 912-2495
Email: jschorr@newschools.org

## PROFESSIONAL EXPERIENCE

*2/08-present* — **NewSchools Venture Fund,** San Francisco, Calif.
Partner. Lead NewSchools' field-building efforts, including major events such as the annual Summit, and oversee publications and public relations and policy advocacy. Share with other Partners responsibility for investment strategy and management.

*4/05-present* — **Stanford University School of Education,** Stanford, Calif.
Lecturer. Teach a seminar on writing about education.

*11/02-2* — **KIPP Foundation,** San Francisco, Calif.
Director of New Initiatives. Led school development, leader selection and training, and curriculum development for elementary and high schools at KIPP, a nonprofit that creates public schools for underserved students throughout the country. Oversaw national support of alumni. Obtained $8.3 million grant from the Gates Foundation.

*6/99-9/02* — **Author, *Hard Lessons*,** published September 2002 by Ballantine Books.
Wrote a critically acclaimed nonfiction book that examined the question of whether charter schools can make a difference in inner-city education, through the real-life story of families in Oakland, California. Jay Mathews of the *Washington Post* wrote, "This is the best book ever written about the single most interesting change in American education in the last ten years." (More at hardlessons.com.)

*6/99-12/01* — **Fellow of the Open Society Institute,** New York, New York.
Won an Individual Project Fellowship to write *Hard Lessons.*

*12/95-6/99* — **The Oakland Tribune,** Oakland, Calif.
Education reporter. Covered the Oakland city schools.

*8/93-12/95* — **Alameda Newspaper Group,** Alameda and Pleasanton, Calif.
Crime and courts reporter.

*6/90-6/93* — **Pasadena High School,** Pasadena, Calif.; **Teach For America,** Los Angeles, Calif.
As a Member of the founding corps of Teach For America, taught English, social studies and journalism to underserved urban students. Introduced desktop publishing to school newspaper. Co-wrote 9th-grade curriculum.

## EDUCATION

*Professional* — **Mount St. Mary's College,** Los Angeles, Calif.: teaching credential, Aug., 1992.

*College* — **Yale University,** New Haven, Conn.
B.A. in Sociology, May, 1990; graduated cum laude, distinction in the major.

*High School* — **Sidwell Friends School,** Washington, D.C.; graduated 1986.

## PUBLICATIONS

In addition to *Hard Lessons,* publications in the *New York Times,* the *Washington Post,* the *Los Angeles Times*; *The Nation,* Salon.com, the *Washington Monthly, Teacher Magazine, Education Week* and *Phi Delta Kappan.*

## AWARDS AND HONORS

- **Outstanding Young Reporter**, N. Calif. Society of Professional Journalists
- **Education Writers Award**, Education Writers Association, Issue Series
- **First Prize**, spot news, California Newspaper Publishers Association

**Kevin Anthony Wooldridge**
**4545 Sequoyah Road**
**Oakland, California 94605**
**(510) 562-5254**
KWEBAY@aol.com

**EXPERIENCE**

3/05- **President and CEO, Education For Change Charter Management Organization**
Manage organization founded to turn around Program Improvement schools in Oakland. Currently operating three charter schools serving approximately 1,250 students at the K-5 level. Provided program vision and managed collaborative effort to develop charters and approval process. Provide leadership to develop organizational infrastructure to support schools with an intense academic focus to help all students in meeting grade level standards.

7/02-2/05 **Executive Director-Leadership Academy,** Oakland Unified School District
Supervise and evaluate group of thirteen elementary principals (ADA-7350). Coach and support principals to focus on improving student achievement. Monitor English Learner Program Compliance. Support full implementation of Math, Literacy and English Language Development Programs. Help design and support professional development programs and activities to improve quality of instruction and improve student achievement.

8/01 – 6/02 **Director, K-12 Partnerships,** California Reading and Literature Project.
Worked with school districts within the San Jose Region to develop and support strategic literacy development plans and in the administration of project activities. Provided direct support to insure teachers received appropriate training and related services to facilitate implementation of system wide effective instructional practices and to insure students achieve high academic standards. Trained site administrators in English Language Development. Provided support in development of new primary language instructional model for Oakland Unified School District.

1/95 – 8/01 **Principal,** Thousand Oaks School, Berkeley Unified School District.
Provided leadership for K-5 programs including Bilingual and Full Inclusion. Development and implementation of school restructuring model to effectively address student needs. PAR Development Committee. PQR Consultant. Supervised staff of 40 certificated and classified employees. Maintain student discipline.

8/89 – 12/94 **Vice Principal,** Malcolm X Intermediate School, BUSD.
Supervised and evaluated certificated and classified staff. Organized and provided staff development training. Maintained student discipline.

8/87 – 8/89 **Lead Facilitator,** Oakland Unified School District.
Coordinated State and Federal Program services, including staff development. Scheduled and monitored services of six resource teachers at two school sites. PQR Lead.

1/85 – 8/87 **Curriculum Assistant,** Oakland Unified School District.
Responsible for State and Federal Program budgets and monitoring site programs as written. Served as bilingual program resource. Supervised and evaluated 20 classified staff members

10/85 – 8/89 **Computer/Language Arts Specialist**
Taught in Migrant Education After School Program. Developed literacy and technology program; taught students to program in LOGO.

8/84 -1/85 **English as a Second Language Specialist**
Taught in pull out program. Did in class lesson demonstrations and presented staff development in-services.

| | |
|---|---|
| /84 – 8/84 | **Spanish Instructor**, Contra Costa College<br>Taught language classes in summer program designed for gifted students. Developed own curriculum. |
| 10/83 – 8/84 | **Bilingual Teacher**, Oakland Unified School District<br>Taught second grade class. Trainer in Cooperative Learning. |
| 9/81 – 9/83 | **Bilingual Teacher**, Richmond Unified School District.<br>Taught first-second and fourth-fifth grade classes. |

**EDUCATION**

| | |
|---|---|
| CREDENTIALS: | Administrative Services - SSFU<br>Multiple Subjects: Bilingual Emphasis - CSUH |
| DEGREES: | Masters of Science in Education: Curriculum - CSUH<br>Bachelor of Arts: Liberal Studies - CSUH |

**ADDITIONAL TRAINING**

- Seven Habits for Effective Leadership
- ACSA Personnel Academy
- Best Practices Literacy Training
- Reading Recovery Advocate
- Program Quality Review Consultant
- Tribes
- Conflict Management and Resolution
- TESA
- Cooperative Learning Institute

**LEADERSHIP IN EDUCATION**

- California State Curriculum Commissioner – Term 1/06 -1/10
- Member of Superintendent's Cabinet – OUSD
- Member of Employee Discipline Hearing Panel - OUSD
- Member Peer Assistance and Review Panel - BUSD
- Member PAR Negotiations Team -BUSD
- Member Student Assignment Task Force - BUSD
- Member District CCR Review Team – OUSD, BUSD
- Lead District Math Committee - BUSD
- Member Title VII Planning Team - BUSD
- Expulsion Hearing Panel Member - BUSD
- Member District Literacy Committee - BUSD
- Consultant Special and Bilingual Education for State Appointed Monitor-Ravenswood USD
- Presenter Full Inclusion and Collaborative Reform-TASH, CAL-TASH and NABE
- Developed District Title I Identification Matrix - BUSD
- Consultant for the Development of Micro Society Federal Magnet School Proposal - BUSD

**REFERENCES**

Available upon request

# Hae-Sin Kim Thomas

1947 Tiffin Road | Oakland, CA 94602 | T: (510) 759-1331 | Email: haesin.thomas@urbanedsolutions.org


## District Reform Experience

urbanED solutions

*Founder and President - 2007-present*

urbanED solutions forms strategic partnerships with district, charter management and/or school leaders to turnaround chronically failing schools using our schoolTRANSFORMATIONS™ curriculum. We have created a three-year turnaround process which re-starts failing schools as reflective, strategic, aligned, and hopeful organizations that remain focused on consistent and steady growth towards equitable outcomes.

Notable Contracts

***Baltimore Transformation Schools, Friendship Public Schools, Aviation High School in Oakland, CA***

- For all three contracts, presented the urbanED solutions' schoolTRANSFORMATIONS curriculum - the creation of eight new 6-12 schools to replace Baltimore's failing schools, the re-visioning of Aviation Charter High School in Oakland, the turnaround of two 6-12 Friendship Schools in Baltimore, and the turnaround of Anacostia High School in DCPS
- Focused teams on articulating their detailed and explicit vision-in-practice and identifying high-leverage, research-based actions to achieve the vision of their schools. Supported teams in developing multiyear strategic implementation plans with clear milestones for success.
- Facilitated teams in designing continuums of instruction to clarify exemplary practice and foundational teaching at their schools and helped them translate the continuums into comprehensive teacher development plans.
- Presented best practice around interventions and facilitated the development of comprehensive interventions plans.
- Led teams in developing School Culture Action plans that clearly detail the steps that will be taken prior to the opening of school to ensure students and adults have a dramatically different experience when they begin these turnaround schools.
- Facilitated the development of leadership data monitoring plans to ensure site leadership is tracking multiple forms of data and meeting regularly with teaching staff around student growth and achievement, intervening immediately as needed.

Oakland Unified School District

*Network Executive Officer, New Schools - 2005-2007*

- Coached and supported new small schools and principals in implementing school programs during opening year.
- Supervised network of first year principals and schools to ensure all schools were sustaining accelerated results.
- Participated as member of district Educational Leadership Organization, group responsible for overseeing and evaluating district-wide strategic projects as part of the *Expect Success* reform initiative.
- Key participant/architect in development of district's Multiyear Academic Acceleration Plan, principal recruitment and selection process, tiered interventions process (internal accountability system) and site planning process.

Oakland Unified School District

*Director New School Development - 2004-2006*

- Developed, researched, and implemented a "New School Incubator" – a yearlong curriculum and program that enables community-based design teams and selected leaders to vision, design and make operational innovative and powerful school programs; 22 successfully opened over three years replacing 18 failing schools.
- Part of the OUSD central office redesign team, specifically working with district leadership on development and implementation of OUSD systems and policies with respect to school accountability, curricular flexibility, No Child Left Behind, district leadership organization and structure and community outreach.

## School Reform Experience

ASCEND

*Founding Principal – 2001-2004*

- Led a design team comprised of teachers and parents in developing a proposal for a new k-8 school as part of the Oakland Unified School District's New Small Autonomous Schools movement.
- Led as founding principal an innovative, nationally-recognized k-8 school with demonstrated excellence in student achievement, parent participation, teacher leadership and satisfaction and community integration. School significantly outperforms neighborhood schools students would have attended prior to ASCEND opening.
- Over two years, increased API from 632 to 701. Great majority of students came from an elementary school performing at 467API and a middle school performing at 454 API the year ASCEND opened.

Claremont Middle School

*Assistant Principal of Instruction – 2000-2001*

- Created a program called Project Turnaround that mentored failing African-American 8th grade boys and successfully graduated the great majority with GPAs of 2.5 and higher.
- Gained 27 points in schoolwide API in one year.

Bret Harte Middle School

*Resource Specialist / Special Education Director – 1993-1999*

- Designed and piloted district's "Learning Center" model where 112 students were supported and monitored in general education classes; model was taken to scale across the district in the following years.
- Averaged 200+% growth with at-risk learning disabled adolescents.

## Other Leadership Experience

**Great Oakland Public Schools (GO Public Schools)**

*Founder – 2008 - present*

- Created a grassroots education advocacy coalition with over 400 participants representing Oakland Unified School District site and central leadership, charter schools, faith-based organizations, community-based organizations, educational nonprofits, City of Oakland, businesses, foundations, higher education, charter schools, parents, teachers, citizens and students organized around a set of beliefs and goals for Oakland's public schools.
- Developed and led subcommittees charged with partnering with the school district leadership and the Board of Education on the Multi-Year Fiscal Recovery Plan, budget cuts, strategic planning, organizing for a parcel tax to fund teacher compensation, organizing for increased education resources at the state and federal level and the superintendent search.

**Teach for America Summer Institute**

*School Director, Special Education School – Summers 1999 and 2000*

- Responsible for managing a 4-week summer program for Special Education students grades k-8 from across Houston, TX.
- Developed and implemented an intensive 6-week teacher training program for new Teach for America special education teachers which included student teaching at a summer program for Houston's students and all necessary coursework.

## Presentations

**Invited Keynote Speaker/ Member of Panel**

- Teach for America Leadership for Equity Summit 2008
- AERA annual meeting 2006
- Teach for America Leadership Forum in Oakland, CA 2006
- Teach for America Welcome to New Corps in Oakland, CA 2006
- The New Teacher Project Welcome to New Teachers in Oakland, CA 2005
- University of California Center for Social Justice Symposium 2004
- Teach for America Leadership Summit in Washington DC 2002

**Invited Presenter**

- EdTrust West Conference 2007 – *Using the New School Development Strategy to Re-Engage Disengaged Communities*
- Oakland Unified School District Principal Professional Development Series 2007- *Using Data as Part of a School's Culture and Climate Plan to Disrupt the Patterns of Referrals and Suspensions*
- New Leaders for New Schools Summer Foundations Principal Preparation Program 2004, 2007- *Understanding and Navigating Urban School Districts*
- BayCES LEAD Principal Certification Program 2006 – Navigating District Politics
- Oakland Unified School District New Teacher Induction Series 2006 – *Creating a Classroom where Students take Personal Responsibility for their Learning*
- PICO Conference 2005 – *Taking a Few Small Schools to Scale, the Challenges, the Strategy*
- Bill and Melinda Gates Foundation Small Schools Conference 2004 – *Small Schools and Systemic District Reform for Equity: Lessons from Oakland, CA*
- Coalition for Essential Schools Fall Forum 2004 – *Maximizing Our Resources to Vision Powerful New Schools for Our Children*

- University of California Berkeley Principals Leadership Institute 2004 – *Making the Site Plan a Useful Tool*

## Recognition

### Awards

- 2008-2009 Fellow in the Aspen Institute/New Schools Venture Fund Entrepreneurial Leaders for Public Education Fellowship Program
- Finalist for Peter Jennings Award for Civic Leadership, 2007
- Named one of "Daring Dozen 2004" in George Lucas Educational Foundation's Edutopia Magazine www.edutopia.org/node/1190

### In The News

- The Birth of a School: An Unusual Opportunity to Build Special Campuses in Troubled District", *San Francisco Chronicle* series on new school development strategy in Oakland. http://sfgate.com/cgi-bin/article.cgi?f=/c/a/2005/01/17/BAGMCARHPA1.DTL
- The Little School that Did", *Edutopia* article on ASCEND www.edutopia.org/little-school-that-did
- "Beyond the Pitfalls – Shared Leadership in a First-Year School", *Fieldwork* article written by Hae-Sin Kim on leadership in a new school www.elschools.org/publications/webarchive/vol11no1.html#anchor4
- "Thinking Small", *Christian Science Monitor* article on small schools movement in Oakland www.elschools.org/publications/webarchive/vol11no1.html#anchor4

## Formal Education

Harvard Graduate School of Education - 1999-2000
- Master of Education in School Leadership
- Certification in Principalship

University of San Francisco - 1993-1995
- Master of Arts in Curriculum and Instruction (focus on Special Education)
- Certification in Special Education
- Masters Project: *The Impact of Special Education Labels on Regular Education Teachers*

Teach For America/Oakland Unified School District Intern Program - 1993-1995
- Certification in Social Science

University of Pennsylvania – Philadelphia, PA - 1989-1993
- Bachelor of Science in Economics

## Credentials

- Administrative Service Certification, California
- Single Subject Social Science Certification, California
- Special Education Certification, California

## Pro Bono Participation

- Lighthouse Community Charter School, Oakland, CA – Founding board member
- Oakland Community Organizations, Oakland, CA - Member
- Oakland Small Schools Foundation, Oakland, CA – Founding board member
- Education for Change, Oakland, CA – Board member

**Education for Change**
**Board Meeting Minutes**
October 16, 2007

## I. Roll call

The following members were present: Desten Broach, Jonathan Garfinkel, and Kevin Wooldridge. Renuka Kher joined us via telephone.

## II. Call to order

Desten called the meeting to order. After reviewing the consent calendar, Desten Broach, President of the Board, made a motion to approve all consent items. The second was provided by Jonathan Garfinkel. Vote to approve items was unanimous (3-0).

## III. Agenda Item #3: Data Overview

Jessica Evans, Chief Academic Officer of Education for Change, briefed the board on the results of our API (academic performance index). There was a significant growth pattern in both English language arts and math, even with the late implementation of the math program. .

## IV. Agenda Item #4: Budget

Fabiola Harvey, Director of Business and Operations of EFC, updated the board on the FY08 budget. She explained both losses and gains in revenue this year. She also shared the importance of sustaining our budget with regard to ADA, adding that we met our target during the first month of school year.

Desten and Jonathan suggested changes that they would like to see made on the monthly budget update model, to include visual charts.

## V. Agenda Item #5: Organizational & CEO Goals

Kevin Wooldridge, Chief Executive Office of EFC, briefed the board on his efforts to support curriculum and develop performance management systems. There was lengthy discussion about performance goals objectives and key results for the year.

Desten spoke of the possibility of getting Kent Romonoff, an independent consultant to work with EFC regarding human resource issues and performance base compensation.

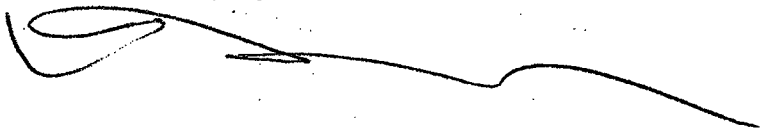
Kevin also updated the board about Creekside Church, which is a church located in Cox Academy's community, reaching out to Education for Change. Earlier this month they donated tables, repaired several bikes of children in the neighborhood, and assisted with painting and cleaning at the site.

## VI. Meeting adjournment

The motion to adjourn was made by Board president Desten Broach. The second to the motion was provided by Board member Wooldridge. The vote to adjourn the meeting was unanimous (3-0)

Minutes submitted by: Kevin Wooldridge

Secretary Signature



**Education for Change**
**Board Meeting Minutes**
March 11, 2008

## I. Roll call

The following members were present: Desten Broach, Jonathan Garfinkel, Kevin Wooldridge, and Joanne Weiss. Fabiola Harvey, Renuka Kher, Jonathan Schoor, andd Kim Powell were also present.

## II. Call to order

Desten called the meeting to order. After reviewing the consent calendar, Desten Broach, President of the Board, made a motion to approve all consent items. The second was provided by Joanne Weiss. Vote to approve items was unanimous (4-0).

## III. Agenda Item #3: Budget Overview

Fabiola Harvey, Director of Business and Operations of EFC, updated the board on the FY08 budget rollup. She shared the projections for the year, and the importance of sustaining a healthy budget, including the reserve account considering the unknown factors for future fiscal years.

## IV. Agenda Item #4: CEO Update

Kevin Wooldridge, Chief Executive Office of EFC, briefed the board on his efforts to support professional development in Math, with an emphasis of building content knowledge for teachers to assist with implementation of the math curriculum. He also updated the board on benchmark assessments and the steady progress being made in all grades with an exception of 3rd grade as well as staff changes.

## V. Agenda Item #4: Board and Organization Vision and Goals

Desten Broach, President of the Board expressed his desire to have a sense of clarity regarding the long term vision and goals of Education for Change and making sure that all board members are all on board. Each board member shared their views of the organization and the direction in which they would like to see the organization move in. The general consensus was to continue to improve by discussing lessons learned as a group and increasing board member engagement within the organization.

## VI. Meeting adjournment

The motion to adjourn was made by Board President Desten Broach. The second to the motion was provided by board member Wooldridge. The vote to adjourn the meeting was unanimous (4-0)

Secretary Signature

**Education for Change**
**Board Meeting Minutes**
June 10, 2008

**Roll call**

The following members were present: Desten Broach, Joanne Weiss, Jonathan Schorr, and Kevin Wooldridge.

**Board Terms**

Desten Broach, President of the Board, called the meeting to order and made a motion for Jonathan Schorr to become a board member. The second was provided by Kevin Wooldridge. Vote to approve Jonathan's membership was unanimous (3-0). Desten moved to accept Joanne Weiss' resignation from the Board. That motion was also seconded by Kevin. Vote to approve Joanne's resignation was unanimous (3-0). After reviewing the consent calendar, Desten made a motion to approve all consent items. The second was provided by Jonathan Schorr. Vote to approve items was unanimous (3-0).

**Agenda Item #3: CEO Update**

Kevin spoke to board regarding new format of CEO Update and welcomed any suggestions. Joanne suggested a general template to include key dashboards, goals and objectives, academic achievements, culture ,community. Four objectives and progress for the year.

Kevin presented the final Cambridge reports. There was a general discussion about the process. There was a general feeling on the part of the staff that the report was accurate although there was some question as to why some of the content appeared to be very compliance oriented. Kevin discussed that several staff members thought the tone and demeanor of the Cambridge team were decidedly negative. It was stated it was some what of a surprise that the report was accurate as the perception that was created by the reviewers let many to believe that the report would be biased and negative. Kevin discussed reviewing the report with principals and the instructional leadership team and how the report would be used to set priorities for the upcoming year. Kevin stated that we really need to focus on the highest leverage points to ensure we are strategic about our improvement efforts. Joanne talked about the goals of the work with Cambridge and how New Schools will use the feedback given.

**Agenda Item #4: Financial Audit Approval**

Fabiola Harvey, Finance and Operations Director, updated the board regarding the audit with auditors, Renuka Kher, and Kevin Wooldridge, which needed approval. Desten made a motion to approve the audit. The second was provided by Jonathan. Vote to approve the audit was unanimous (3-0).

**Agenda Item #4: FY 09 Budget**

Fabiola Harvey explained the closing of the FY 08 budget and the linking of the FY 09 budget. She shared projections and key points around the enrollment drop at Cox, which has been affected each year, and the healthiness of the FY 09 budget. There was conversation regarding achievement being linked to the reserve funds and the need to operate the organization with guidelines around when reserve funds should or should not be used, the need for fundraising and what we should be doing to invest in our future. Joanne suggested that Principals should have budget input beginning this current school year. She felt that it will help when principals are aware of deficits in the budget.

**VI. Meeting adjournment**

The motion to adjourn was made by Board president Desten Broach. The second to the motion was provided by Board member Wooldridge. The vote to adjourn the meeting was unanimous (3-0)

Secretary Signature

**Education for Change**
**Board Meeting Minutes**
October 23, 2008

I. **Roll call**
The following members were present: Desten Broach, Jonathan Schorr, Jonathan Garfinkel, Hae-Sin Thomas, Richard McNeel, Kevin Wooldridge.

II. **Board Terms**
Desten Broach, President of the Board, called the meeting to order.
After reviewing the minutes from the EFC Board meeting June 10,2008, Desten made a motion to approve all consent items after a change of the word "adjectives" to "objectives" under agenda item #3 paragraph one. The second was provided by Jonathan Schorr. Vote to approve items was unanimous (4-0)

III. **CEO update**
Kevin Wooldridge , Chief Executive Office of EFC, briefed the board on enrollment/ADA, being on target. Mr. Wooldrige also briefed the Board on the Pre-school Program, how this will benefit World Academy.

Mr. Wooldridge also briefed the board on the current financial Audit status for EFC. This will be reviewed at the next meeting.

Mr.Wooldridge talked about supporting the needs of the children and families by providing before and after school programs as well as Saturday school at Cox. Also, the addition of Revolution Foods is providing a healthier diet also at Cox. Finally, trainings are being provided for staff to increase achievement by identifying decoding students verses non-decoders and differentiating instruction accordingly.

Mr. Wooldridge also pointed out a successful partnership with the county to provide an intern at Cox to support students and families with mental health issues.

Mr. Wooldridge also discussed staff retention rates and the on going goals that relate to achieving current targeted rates.

Mr. Wooldridge briefed the board on EFC's current health benefits status.

IV. **CST Results Reports**
Mr. Wooldridge presented the attached report regarding School's CST results.

V. **School Evaluation Rubric**
It was decided that Mr. Wooldridge would provide a check list for the boards review for the purpose of building a rubric that would allow for the quantitative evaluation and proper promotion and support for EFC schools by the board.

VI. **Meeting Adjournment**
Mr. Broach requested a motion to adjourn the meeting. The second to the motion was provided by Board member Joanathan Schorr. The vote to adjourn the meeting was unanimous (4-0)

Secretary Signature _____

**Education for Change**
**Board Meeting Minutes**
January 26, 2009

## I. Roll call

The following members were present: Desten Broach, Jonathan Schorr, Hae-Sin Thomas, Jessica Evans, KevinWooldridge, Olga Hernandez and Jeff Liaw also attending the meeting by phone.

## II. Board Terms

Desten Broach, President of the Board, called the meeting to order.
After reviewing the minutes from the EFC Board meeting of October 23,2008. Desten made a motion to approve all consent items. The second was provided by Jonathan Schorr. Vote to approve consent items was unanimous (4-0)

## III. CEO update

Kevin Wooldridge , Chief Executive Officer of EFC, briefed the board regarding improvement in instruction and how Professor Phil Gonsalves from Cal State East Bay was hired to coach teachers in math. Mr. Wooldridge suggested coming up with accelerated achievement ideas for Cox Academy. Mr. Wooldridge identified culture and unintentionally low expectations as areas of needed improvement at Cox Academy.

## IV. Financial Report

Mr. Wooldridge suggested that the Financial Report be tabled to another meeting.

## V. Achievement Results and Challenges

Mr. Wooldridge provided a list of Oakland Elementary schools to compare API scores with Cox Academy's scores. These are schools that students from Cox might be attending if they were not attending Cox Academy. Mr Wooldridge also compared the Ethnic breakdown and the percentage on free or reduced lunches for the board members to review for comparison purposes with other like schools.

Mr.Wooldridge then reiterated the challenges with Culture and unintentional lowered expectations. He suggested bringing in someone such as Norma (?) that had been successful at a school with a similar population to analyze Cox and consult on steps to take that could address the challenges Cox is facing. He also mentioned that instruction is clearly improved over last year at Cox. In fact he believed that instruction was now seamless between Cox, World and Achieve.

Hae-Sin Thomas felt that this might be the problem. She felt that Cox's instruction should actually look different than it does at World and Achieve because the population is different. She had recently observed at classes at Woodland and Monarch (successful

schools with like populations as Cox) and felt that students were clearly more vocal at these schools during instruction than what she had observed at Cox.

Mr. Schorr felt that EFC needs to raise the bar higher than what the District would set for our particular Schools like Cox otherwise why would we exist? He recommended a "radical" change to achieve results.

Ms. Thomas suggested bringing in outside people like Mary Pippitt-Cervantes or Vanessa Flynn. She also felt offering incentive based pay and increased pay at Cox that could attract a higher quality teacher. She also suggested expanding the recruiting pool for new teaching positions over what we have used in the past including allocating funds for recruitment.

Jessica Evans added that the Cox staff was focused on student engagement as a result of SAIT.

Ms, Thomas inquired as to how Principals were currently being Coached and developed and felt this was something we needed to show was being done in order to obtain a renewals for our charters.

Mr. Wooldridge responded that they had attended a conference this year where a successful educator talked about ways to improve instruction.

Mr. Broach recommended that Kevin Wooldridge and Jessica Evans spend additional time at Cox Academy.

It was also requested that Mr. Wooldridge put a written chart together of what steps are being taken to improve instruction at Cox Academy for the Boards review.

## VI. Meeting Adjournment

Mr. Broach requested a motion to adjourn the meeting. The second to the motion was provided by Board member Joanathan Schorr. The vote to adjourn the meeting was unanimous (4-0)

Secretary Signature _____

Education *for* Change

**Board Meeting Minutes**
**March 17, 2009**

**In attendance: Desten, Fabi, Hae-Sin, Jonathan (via phone first joined later in person) Jeff, Kevin, Fernando and Jessica.**

**Introduction of new Board Member: Jeff Liaw**

Desten started the meeting by letting Jeff give us an introduction of his background. Jeff was nominated by Jonathan Garfinkel, ex board member to take the space that was vacated because of his job relocation

Desten introduced the rest of the Board Members. No questions from Jeff.

J. Schorr requested that Jeff explain why he fits into the picture as a board member

Jeff feels that in order to be a good citizen in California he has to do his part. His interest is in charter schools because a lot of the creative thought is happening in the charter school movement and it's concept of bringing change. He wants to be a part of it. What he knows of EFC is what JG shared with him. He is very excited about what he has encountered, has met staff and he feels that we are on the right track. He hopes to be able to contribute on the financial side as well as on the academic side.

Hae-Sin introduced herself too. She was part of OUSD and left to do consulting work.

Desten asks that Jeff steps out of the room for discussion about his candidacy for board membership. Desten expresses his excitement about having Jeff and what he brings to the table.

There was a unanimous vote to have Jeff Liaw join the EFC board.

**Mary Pippitt has been invited to give us a quick recap of her observations at EFC.**

Things are in place, we are ready for the next steps. We have the right foundation.

Need to engage students more. Ownership by students as next step. Betsy was also here, they see the need of getting into the text more as a future step. Taking OC and delving deep, making it more personalized. Taking the solid foundation and use teacher expertise to maximize good teaching strategies and better interaction with the kids. Too much control rests with teachers that should be with the students.

ELD/ Focusing a lot on OUSD. They have seen some success in OUSD. They're using Language for learning as a program.

Linguistic and it works.

Desten: what is going to help Cox?

Mary: Notion of too much content in PD, too broad, conversations with Kevin that it will be focused on comprehension and text analysis.

Hae-Sin: She recommended that we reached out to Mary and her expertise from what they had done previously. Use more grouping, more collaborative instruction.

Mary: How to take a teacher from over depending on the program to get them to be metacognitive about their teaching.

A strategy of coaching doing the "in the moment" coaching, are students responding or not? You have to be overly prepared to be able to make those decisions about students getting it, being hard. To teach them to use what they have to make it better which is hard to coach. The coach has to help to develop for teachers to take responsibility to personalize to make it effective.

**New PD Model Jessica Evans, CAO**

Desten: How does this contrast with what we have been doing?
The new model allows deeper work over a more extended time period

**New Model/PPP Jessica Evans, CAO**

Focus on actual student learning and thinking. What are they thinking, what is their response? The idea is to focus on comprehension because it is an area of concern and text analysis. Kids to do deep analysis of what they are reading. Coaches to be in the classroom with the teachers. Inquiry project between teachers and coaches. Who are the lowest kids, how to engage the students, looking at different strategies, informal data to be collected, how kids respond to that.

Wednesdays PD, coaches with teachers targeted grade level analyzing text and prepare next week's instruction. Are we getting all the kids engaged, how we push them further, continued dialogue.

There is considerable discussion about why choral reading is so valuable and how we structure our program and instructional practice to produce proficient readers. Betsy gave quite a bit of detail about her work and practice based PD.

Kevin steps out for a moment to take Mary to the airport while Fernando starts the presentation.

Cox Update by Fernando Yanez

**Showing some areas of growth ELA remains our focus. WE are not seeing the next step/level. We still have a chunk of our kids in the far below basic. We are showing mixed growth. For math we are showing.**

**Kinder: midyear at or above benchmark; showing growth except for rhyming. Higher on upper, lower, hfw, and blending.**

**1st grade: fluency spelling and writing higher. Word reading lower than last year.**

**2nd grade: what does the unit mean? Desten asks, Fernando clarifies the unit concept. We are looking at the 3rd unit, this is what the benchmark data shows. Categories change in 2nd grade. Taking a dip on comprehension. J. Schorr – is that teacher low in that area or in all of them? Fernando can look at the data but we are providing support. Is the teacher struggling overall? FY not struggling but having difficulty in some areas. Will come back with an answer.**

**3rd grade: fluency taking a dive, higher: checking skills, spelling, vocabulary and writing. Students backsliding.**

**They are proficient but next year we are not meeting the need. In terms to the PD model we are going to look at 3rd grade and look at the comprehension piece. Why's and How's instead of Who's?**

**Jeff: is that typical across all schools? FY what happens is that when you look at K benchmarks they are based on monitoring, model is not an exam. 2-3 4 is an application model, kids applying the model of being able to read, it is an independent process. That is our focus. Disturbing trend looking at the data and see the difference from grade to grade.**

**We are not meeting the need. Hae-Sin, across the system it is a pattern across the state. K has the highest level of benchmarks. World and Achieve doing a better job at breaking the pattern but still remains an issue. Tricky: K-2 learning to read years. Then switching to reading to learn.**

**Flipping has been the struggle in our communities. There is dramatic drop-of from grade to grade.**

**JE: the focus is around the fluency piece, are they really learning how to read? We have lots of kids that did not know how to read. Jeff: Great in K, having a hard time in 3rd. is it the benchmarks? Hae-Sin: interesting point and question the fact that comprehension is not tested until 1st grade second half. Are we starting high and seeing a drop or are we starting low? It is great if you can decode but reading is about comprehension.**

**It is a conversation around how are we supporting our upper grade teachers doing more work at the elementary level.**

**JE: there is more that you can do at the lower grade levels, there are things that they can do to start building the expectations in the kids so it can be more of a focus on higher grades. Our model starts with 3rd grade the idea is to move to other grades. Hae-Sin: regardless of the teachers kids need more support as standards get harder.**

Very dramatic changes in 3rd grade.

Desten: Where do apply resources? I would just suggest that all of you should question yourselves where to apply the resources what is the right mix of resources. Hae-Sin: just learned about the reserve. It is a concern that we may have too much money in reserve based on the need to fill gaps the still exist.

Kevin: We have been conservative. We have a very young staff with people relatively low on the salary schedule and we have to make sure we are in the right position as salaries increase but clearly we are in a position to be more aggressive in addressing current needs. Building capacity is critical. Fabi: It is because of the reserves that we are able to focus on academic. Hae-Sin, we need to find the balance. Kevin: How do we find the balance? Clearly next year in spite of the extremely bleak economic outlook we will be looking at how to leverage more resources to achieve our goals

5th grade: Comprehension is an area of challenge. Writing significantly lower. We have been teacher heavy and directed and we have trained kids to be that way. Kids are not independent. Looking forward to training teachers in making the kids more independent. From other data, we are at a perfect launching point; it is how to take them to the next level as they are interacting with the curriculum and the text.

Identify Concerns

- Sense of urgency
- Student engagement
  - Is it the same kids?
- Are teachers maximizing strategies? Are they calling one kid at the time? Choral reading vs. other type of reading.
- Are we looking at deep levels of understanding of students? Are kids articulating their answers? The oral part of the transaction strategy

J Schorr

How do you define the sense of emergency? FY we will clarify that.

- Teacher retention/school culture
  - Hired 18 new teachers in 08, 6 new teachers in 09
  - Are we using teacher survey results, what are we doing with it?

What are we doing?

I knew that it was urgent; we would need a lot of change. Taking new teachers and new coaches, ensuring that we follow philosophy in regards to curriculum. To me that was important. That is what got us to the point where we are today. We have the foundation now, we didn't have it before.

Jan 27 meeting. We discussed urgency as a staff. We went from feeling about having green teachers to feeling about being ready to talk about the truth things. We had choices to make. Reflective moment for all staff. Either we pull it together or we do not have the school.

Discussions did a free write about it, at that time I decided that we were going to pick up the building brick by brick. I wanted my teachers to pick up students by name because I think that is powerful and to give them concrete numbers. They had to identify kids that needed the help. We created a tracking model for those kids. I want kids to think about their "1st year" students on a daily basis. Am I cognitively planning for those kids? Did I get them to that point? J. Schorr, what was their response as a staff? FY: What I allowed them to do is to take it in, it was a reality check for my staff, what I got from their reflections they welcomed the challenge and they were ready to take this message. We talked about the pieces we were going to change.

Hae-Sin: You got the most recent data in August, and you have been at Cox a year and a half, why didn't the meeting happen in Jan 2007? FY I am not sure, the meeting didn't happen to this extent and to do the pieces that we needed to do. I didn't feel they were ready.

FY: Focus on Student Engagement

Looking at grade level agreements. Teacher will ____ and students will _____. Follow up observations. SAIT report. Even our own observations began to change. From routines and procedures to how are we using data, room set up, give teachers' feedback, are you placing kids in strategic locations. Getting to the basic level of questions for teachers.

Coaches' demos changed. The coaches' job is to show them how to do it with their kids. A lot of coach demo, elbows and observations. Shift from procedures and routines to engagement. Teachers want to see it done with their kids.

Focus on certain strategies: think, pair share, student grouping, equity sticks. Break habits of kids that are going to be quiet and we are not going to get them engaged.
Use of data to inform instructional practice: Use of daily informal data to inform instruction, shift in observations. What is our expectation from the feedback we get from our students? Providing feedback, how are you checking in? Hae-Sin: challenge was standards alignment. How do you get teachers that are used to using the teachers' manual to how are they organized?
JE: informal data piece aligned to objectives. If this is what they are supposed to learn, what do I need to do, also thinking what is the informal data I have to be collecting now? You should have a good sense of the kids' scores.
Kevin: having a common understanding at a grade appropriate level is a challenge for us, an area where we have to do major work.
Hae-Sin: challenge in upper grade levels. JE: is that the level we are actually expecting, depth, thought.
Kevin: it is about expectations and the reality is that we have a lot of teachers and other staff members that never worked with middle class and upper class. Want to raise teachers' expectations. Hae-Sin, do they get out to see other teachers? KW Lissa visited Castro Valley blue ribbon school. They talked about it yesterday about the gap in their expectations. We need to get them familiar with what practice and work product look like when you have high performing schools. JE: we want to get teachers into each others classrooms. We have huge ranges among our own teachers.
KE: all teachers benefit from seeing other classrooms no matter where they are. Our teachers started to feel comfortable and
FY: Daily informal. It is not paper exercise. It is the teacher ensuring there are systems in place
J. Schorr: informal vs. formal. How do you segment your teaching staff as you think about it? You may have a principal who thinks about 3 groups: excellent, needing significant help, those that are not going to get it. % in each of the buckets you create?
FY: we sit down with our coaches and develop a plan looking at their development. The lens I have been using thru a routine and procedures perspective. Teachers that are not able to execute the program. Conversations as follow-up. And coaches work with them. Level I, fresh new teacher can be a multitude of problems, not delivering curriculum, classroom mgmt, math component. Level 0, resisters. Level II, teachers who were essentially practicing routines and began internalizing. Level III the model teachers. All routines and procedures were in place. Have level I and II visit level III. J.Schorr 0 are 0, 10% in 1, most of them in Level II, 20% are in Level III. Struggle for me is that we have the right balance among all grade levels. We struggle at the upper grade. Schorr. Student performance is a factor? At this point we need to fit it into the model.
Hae-Sin: Can we afford first year teachers, level I teachers? When we have kids that are falling behind can we afford to have brand new teachers? FY: level of training they come with it. I prefer veterans with the right attitude. Looking at our pool of applicants. It is a different person who applies for charter schools. There is a dispelling about the myths they hear about charter schools.
Schorr: last week was pink slip week. When was for us? Kevin: Midterm evaluations were done by 2.28. Schorr how many teachers have their job in jeopardy for performance? Possibly 2 or 3. I am looking at their attitude changes, at their development.
4 have been notified that there is an issue with their performance. For me it is about retention, culture, but we don't have to be stuck with teachers that are not doing the job right.
We need to think as a board as COLA for next year. Our HR has produced a report of salaries and benefits and we are very competitive. Reserves vs. having our schools. Thinking monetary incentives.

Desten's Questions:
When or how soon will we know if this is working? Reasonable confidence that we are heading in the right direction.
JE: We have unit 4. 3rd grade is in a different system. In 6 weeks we will have benchmark data. Desten: Worried about results. Most important until August.

FY: We also started a before school program. Shifted afterschool program. Looking at data, especially comprehension data. It will be a fresh set of data. How is this modifying results. Doing a mini benchmark in the middle. End of unit 5 the unit that was "cotaught". We should have a meeting about it.

**Board Meeting Calendar**
**Desten: Schedule meetings. Everyone will check their calendars.**

**OUSD visits Cox**
**David Montes will come to Cox on May 19 at 1:30 p.m. to talk about renewal process**
**Comprehensive data monitoring process, quality of instruction, performance.**

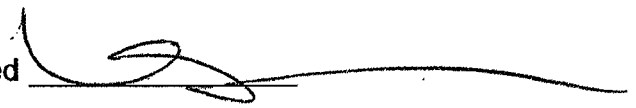
**<u>Move to Approve the minutes from the last meeting</u>**
**Unanimously approved**

**Hae-Sin: I would love to hear about Interventions.**
**Jessica can email a preview**

**J Schorr asks:**
**He has heard a ton of detail about performance at Cox. What are you as a CEO walking away with? What is the big take away about performance at Cox?**

**Kevin answers:**
**Overall we are moving forward at Cox. If you want specific details around performance we need to address this in a closed session that I would be glad to schedule. I have confidence that that we are doing is going to yield better results. I try not to overwhelm you with too much information. I will send you a presentation about what I am doing about expectations with everyone in the organization. I need to be the driving force in setting appropriate standards for EFC students and staff.**

**J. Schorr**
**The message of your job is directly tied to your performance and it is a powerful message what you are sending out. It would be helpful to be able to have closed sessions about performance in relationship to what was reported.**

Approved 

**Board Meeting – June 3, 2009 – Minutes -**

**Attendees:** Jessica Evans, Kevin Wooldridge, Rich McNeel, Jeff Liaw, Desten Broach, Jonathan Schorr

**Absent:** Hai-Sen

**Items**

- **Year to date Attendance was reviewed briefly, the following ada % were discussed:**

Cox 95.3 World 96.8 Achieve 96.6

Kevin talked about our continued effort to increase and maintain ADA goals across the board. He was encouraged by the current rates.

- **API**

Kevin explained to the Board Members what API is and that reaching 800 is the state goal for all schools. He also mentioned that the state requires an increase in points each based on how far the school is from 800. He added that NCLB requires progressively more restrictions if you continue not meeting goals. Kevin feels comfortable making the 11 points (09 target) at Cox because of consistent instruction.

Discussion was moved into developing a protocol for new Board Member vetting. Jonathan proposed a matrix for Board Members' skills. Kevin suggested Yolanda Peeks as a candidate with vast experience in urban populations. Board Members shared their thoughts on Yolanda's work and her deep involvement with the community. Jonathan agreed with Kevin's assessment. Kevin also brought up Reverend C. Ward as another candidate that is strongly tied to the community. He is currently a minister at a church on 90th street. The third candidate Kevin talked about is Louis Waters who used to be associate superintendent of instruction at OUSD. Kevin met with Don Shelvey who would consider being a mentor to Kevin and an advisor to our organization.

- **Consent Calendar**

Minutes from March were approved by Desten and seconded by Jeff Liaw. All voted "AYE".

- **Board Member Resignation**

Jonathan Schorr presented his resignation effective July 15, 2009 due to an increase workload.

- **Overall Operations**

Desten requested an update on the overall operations of the organization specifically cash flow. Kevin responded that even though the state is in crisis, we are stable because of our reserves. Jonathan commented that unlike most charter organizations we are "in the black", he was very happy that we have taken a conservative management approach.

- **Achievement Results and New PD Model (Power Point)**

Jessica presented a power point to talk about the most current results and the new P.D. model supported in conjunction with Betsy Eaves. The new model is coaches teaching with teachers as co-teachers. Overall she has seen good results with students being more engaged and teachers seeing students being more motivated to learn. Now that they are reading and understanding what they are reading, not only reading.

Kevin asked Board Members about their visits to our schools. Desten talked about how impressed he was with what he saw. Jessica talked about kids' fluency scores going up and that they are better seeing structures and patterns in text. Kevin explained the concept question board to all members. Jessica explained that students are asking questions about the themes and not only about the pictures.

Jeff asked about specific data. Jessica said she was waiting for the data. She shared several positive comments coming from the teachers. She also indicated that vast majority of the targeted group which is Cox and World 3rd grade are reading. There are only one or two non decoders not reading.

The next steps are: to analyze data, look at benchmarks CST and observational data, ideas are based on the current data and there is another set of data to come, development of a strategic implementation plan and a calendar of key mile stones. Kevin asked how we control for homogeneous outcomes. Jeff also asked what the focus is. Jessica answered that the focus was on comprehension skills, targeting grade 3, because we saw a dip in 3rd grade data, coaches focused on that grade and the comprehension and coaches also focused on how we access the kids that have not yet been reached. Jeff asked if teachers enjoyed the project, Jessica replied that it was awkward at the beginning but that teachers began to feel like "co-collaborator" as opposed to interrupters. Jessica also explained that teachers communicated with their parents about the project so they would not feel that they were being bad teachers because they needed help but because it was a project with all 3rd graders. To close this part of the meeting Jonathan explained that data was important for a group of board members that are not educators, he talked about having a committee of members with educational background that can translate to the board the results of the educational observables.

- **Charter Renewal Process and Timeline**

Board Members exchanged questions and answers related to the charter renewal process. (Facilities, ada, county support, etc)

- **Teacher Retention**

Kevin reported on the high level of Teacher Retention with a vast majority of teachers at all 3 sites planning to return the upcoming school year.

***Closed Session began. Meeting was adjourned at approximately 7:00 p.m.***

Kevin Wooldrige

EFC Board Meeting
Closed Session
August 13, 2009
4:15 pm – 4:45 pm

Closed Session

Action was taken by the board to reject the claim 5-0.

Secretary Signature

# Education for Change
# Board Meeting Minutes
September 16, 2009

## I. Roll call

Desten Broach conducted a roll call. The following members were present:
Desten Broach, Kevin Wooldridge, Hae-Sin Thomas
Other staff member present: Fabiola Harvey, Jessica Evans, and Tavita Garcia

## II. Call to order

Desten called the meeting to order. Board discussed minutes from board meetings that occurred on June 3, 2009.
Board member Desten Broach made a motion to approve the minutes as written.
Motion to approve: All in favor (D. K, H) approval of minutes for the June 3, 2009 meeting of the Board of Directors.
Illness Policy and Internet Policy Approved.
D- Provide exceptions for emergencies.
K- Ena met with DA regarding Illness Policy to check our Policy for family emergencies.

## III. CEO update

Kevin Wooldridge, CEO of Education for Change, briefed the board on the following Items:

**Cox:**
Was scheduled for major construction over the summer, not completely finished but our team was able to open on the first day of school with no major issues. It improved visual of school, parents and teachers are happy, school looks great. Construction is still going on. Reach Academy has a new principal, Iliana Davis, very supportive and very open to collaborate with us. For example, our Principal from Cox and her are working together in maximizing space for both schools both in the cafeteria and yard. So far it has worked great.

**Charter Petition:**
Charter Petition is almost completed. KW has a meeting with the consultant via phone on Monday September 21, 2009 to go over final questions. Consultant is working on the Instructional side and Paul Minney's office is working on the legalities.

**Current Enrollment:**
Achieve Academy down 5; Cox Academy down 20; World Academy down 8
KW: Typically after Labor Day enrollment seems to have a significant change, but it was not the case this year.
DB: Brings up the point that the drop at Cox is more significant.
KW: The population that has decreased the most in Oakland is the African American population and it's creating an issue. Cox Academy has a bigger AA population than World and Achieve.
HT inquires about methodology for setting enrollment targets.
KW/FH talked about their strategy for recruitment.
HT talks about work at Aspire and asks what the long term strategies are in regards to enrollment for the future years.

KW: One of our benefits at World Academy is the 0-5 program through EBAC. We build a relationship with the parents to recruit for Kindergarten. The kids that come to this program "automatically" come to our school. That should be also in the future used at Cox.
DB: Long term if we show success and if we promote it and advertise it, our parents will want to come to our school.
HT: Some of it is marketing; some of it is community outreach. Aspire schools have more AA students.
Desten talks about marketing, promotion and product, if we have better product we can attract more students.
KW: We need to have a stronger plan for enrollment growth.
KW suggested Open House to promote the Charter School.

**After School Program:**
We are creating a new AS program that will include both enrichment and academic.
Cox is serving about 60 kids that include intervention plus enrichment. 45 kids are in three different sessions for enrichment only.

**Food Services:**
KW and FH did an update
Cox went back to San Lorenzo
Salad bar was included at both sites this is a way to promote healthier eating at school and at home. Kids are definitely eating more. There is no Chocolate, Strawberry milk; only 1% and 2% milk is used.
DB: If we think that parents are happy with this new decision, this could be part of the marketing to promote the Charter School.

**504s:**
Management team was trained on 504s.
KW asks the board if they would like to know more specifics about it and explains the main guidelines of the program.
HT asks if there is any progress to pull away from OUSD Special Education.
KW indicates we have talked to our legal counsel and are having initial conversations regarding what it would take to belong to a new SELPA.

## IV. Agenda Item #3: CST Data

See Data presentation by Jessica
DB: How did we get better results this year?
KW: Greater level of consistency at Cox, targeting the PD on specific needs, PD model helped to attune on what was happening and what was not happening at different grade levels. KW also mentioned a new fluency program to make sure students are accessing grade level text in a way that they will be exposed to their level of vocabulary. Pushing the belief that if we are really skillful and thoughtful in our approach and are able to offer rigorous materials and allow them the kind of instruction that is going to accelerate that approach.

We are going to be looking, our kids don't read outside of school. Really we have a goal that our kids participate in meaningful reading at least 40 minutes a day. That should make a significant difference in our kids.

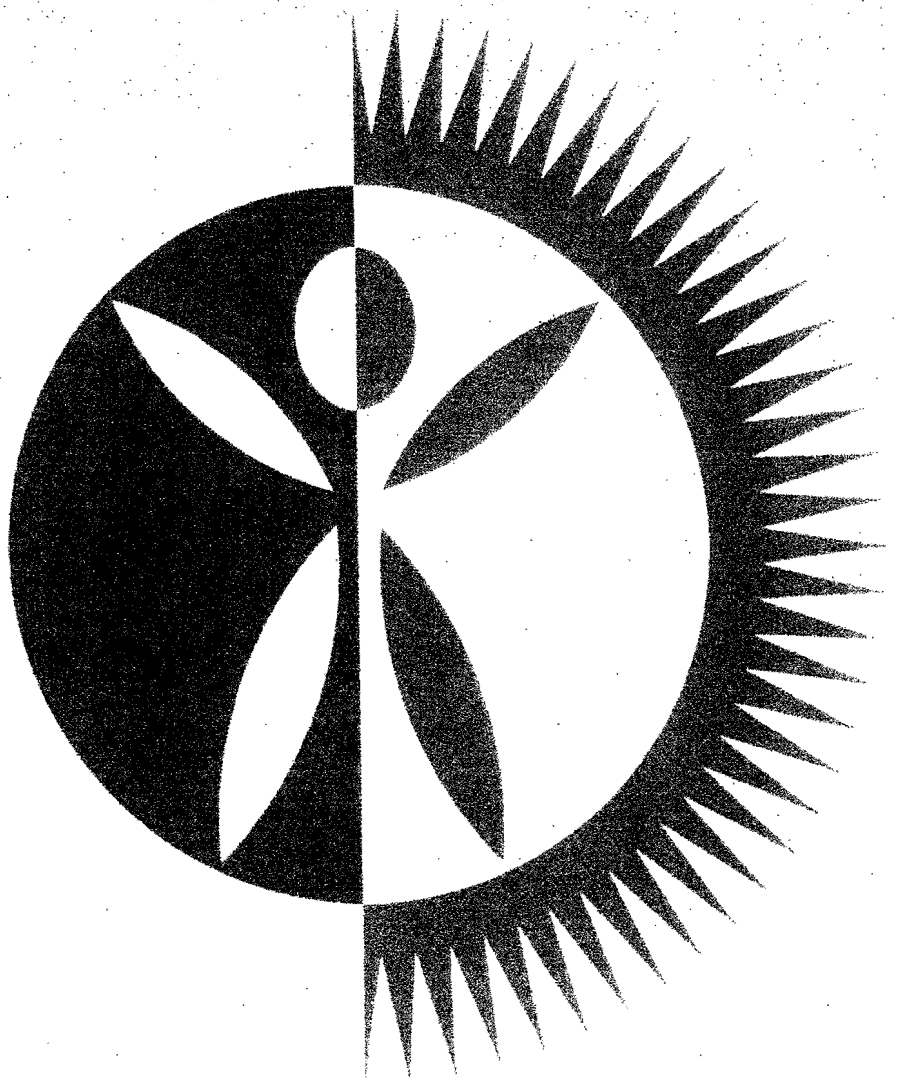
**Follow-up for next Board Meeting:**
Hae-Sin Thomas requested to have a 09-10 annual calendar aligned for board meetings mapped out. Commit ourselves for board meetings, set it at next meeting and e-mail proposed dates and topic.

## V. Meeting adjournment

- Board Chair requested a motion to adjourn the meeting if no other business was to be conducted.
- Motion made to adjourn meeting made by Board Member Desten Broach at 6:28 p.m.

Minutes submitted by: Kevin Wooldridge

Secretary Signature



# Education *for* Change

**Employee Handbook**
**Fall 2009**

Dear EFC Employee,

On behalf of the Education for Change Board of Trustees and our growing community of students, parents, teachers and staff, thank you for joining our team!

We have mapped out a very clear approach to addressing the needs of our students. It is an approach which focuses on providing intense professional development and collaborative planning time for teachers to ensure we are continuously becoming more effective in successfully addressing the academic needs of all our students. Consistent, coherent, and high quality instruction is the key to success for our students.

For those of us who are not in the classroom, it is of critical importance that we do everything possible to support the learning environment, and the systems and services which allow the instructional staff to maintain their focus on instruction.

We believe we can all make a great contribution to communities in need of high quality public education.

Sincerely,

**Kevin Wooldridge, Chief Executive Officer**

Table of Contents

[I. WHO WE ARE

II. THE EDUCATION FOR CHANGE WAY

III. CONDITIONS OF EMPLOYMENT

IV. WORKPLACE SAFETY

V. COMPENSATION AND BENEFITS

VI. EVALUATION AND RECORD KEEPING

VII. HOLIDAYS, VACATIONS AND LEAVES

VIII. DISCIPLINE AND TERMINATION

IX. COMPLAINTS AGAINST PERSONNEL

X. EMPLOYMENT ACKNOWLDGE

# I. WHO WE ARE

## Introduction

As an Education for Change ("EFC") employee, you are an integral member of our team. Your dedication and commitment are the primary ingredients of our success as an organization and of the success of our students. We trust that you will find your employment with EFC to be both challenging and rewarding.

EFC recognizes that our strength as an organization lies in the quality of our employees and our ability to work together as a team to achieve our shared mission. We believe that each individual makes a profound and positive difference, not only in shaping the lives of our students, but also in contributing to the effectiveness of our Leadership community. Toward this end, we encourage you to engage in open communication about any aspect of your employment with EFC.

## Education for Change's History

Education for Change ("EFC"), a non-profit school development organization, was founded in 2005 by experienced educators and entrepreneurs to develop quality public charter elementary schools. EFC serves ethnically and economically diverse students and its schools are located in or near low-income neighborhoods.

## Our Governance Structure

EFC is a California Non-Profit Public Benefit Corporation, and is a tax-exempt 501(c)(3) organization. All EFC schools operate as part of this single organization and all EFC employees are employees of this single non-profit corporation. While local school boards approve our charters, neither they nor the local school districts direct EFC's internal operating policies and procedures. EFC has the freedom to establish its own policies and procedures, as long as they comply with the EFC charters and applicable state and federal law.

The leader of each school is the school Principal and the entire school staff reports to the Principal. The Principal, in turn, reports to the Chief Executive Officer ("CEO") of Education for Change. Each Principal will work with and receive guidance on local issues from the Home Office, the School Site Council, and the English Language Learner Advisory Council, which include parents and community members

The EFC Board of Trustees is responsible for governing the organization. The Trustees each have a personal fiduciary duty to look out for the long-term well-being of EFC. The Board is responsible for dealing with the strategic policies that affect the organization, as well as approving budgets, policies, and other important decisions. The Board is composed of a broad cross-section of the school community, the community-at-large, and professionals and community leaders.

## Role of the EFC Home Office

The EFC Home Office provides support and assistance to each school, and helps disseminate EFC's values, programs, norms, and high standards. The Home Office focuses on:

- Ensuring quality.
- Facilitating learning across the community based on best practices, site innovation and research.
- Guiding school development, negotiating school district relationships, and building community partnerships.
- Providing centralized services and support, including professional development, curriculum development, financial management, enrollment-outreach, fundraising, human resources, recruiting, payroll, facilities development, government compliance, technology planning, and purchasing.

EFC combines Home Office coordination and oversight with significant school authority. Centralized functions have economies of scale and support our educational mission by enabling Principals, teachers and school staff to focus on teaching, students and learning. The goal of the Home Office is to provide services to the schools far in excess of what a stand-alone charter school would be able to afford or acquire on its own.

## EFC Community

The EFC community of schools is designed to help students, teachers and parents by ensuring that all students experience a high quality, coherent, and research-based instructional program.

Research-based instruction will be a primary focus of staff development. The EFC community enables individual schools to better communicate with districts. Community partners are able to avoid "back office" support issues that school systems and individual schools must often address (i.e. politics, facilities operations and overall fundraising). The power of the community ensures financial sustainability of individual schools and flexibility in meeting challenges as the organization grows.

## Charter Schools Background

Welcome to the world of charter schools! Charter schools are having a profound impact on K-12 public education around the country. It is sometimes hard to believe that the charter school movement is less than 20 years old!

In 1991, Minnesota was the first state to approve charter school legislation. California was the second in 1992, followed by Massachusetts. As of this date, forty-one states including the District of Columbia now have charter school laws, although some state laws effectively make it

difficult to start these schools. From one school in 1992, there are now approximately 2,996 charter schools operating nationwide, serving over one million students.

What is a charter school? A charter school is a tuition-free independent public school working within the public school system. Charter schools can design their own innovative curriculum, hire their own staff, and control their own budget. They are publicly funded like other public schools.

A charter school is created or organized by a group of teachers, parents and community leaders or a non-profit organization like EFC, and the charter petition is usually approved by an existing local public school board or county board of education.

Specific goals and operating procedures for the charter school are detailed in an agreement (or "charter") between the granting authority school board and charter organizers. The charter establishing each such school is a performance contract detailing the school's program, goals, students served, methods of student assessment, and ways to measure student success.

A charter school is generally exempt from most laws governing school districts, except where specifically noted in the law. For example, California public charter schools are required to participate in the statewide testing program. The law also requires that a public charter school be nonsectarian in its programs, admission policies, employment practices, and all other operations, and it prohibits the conversion of a private school to a charter school. Public charter schools may not charge tuition and may not discriminate against any person on the basis of ethnicity, national origin, gender, or disability.

Some of the goals of the charter school movement are to:

- Increase opportunities for learning and access to quality education.
- Create choice for parents and students within the public school system.
- Provide a system of accountability for results in public education.
- Encourage innovative teaching practices.
- Create new professional opportunities for teachers.
- Encourage community and parent involvement in public education.
- Leverage improved public education broadly.

For additional information on charter schools, please visit the following websites:

- California Charter School Association: www.charterassociation.org
- California Department of Education Charter Schools Home Page: www.cde.ca.gov/sp/cs/

- US Charter Schools: www.uscharterschools.org
- Charter Schools Development Center: www.cacharterschools.org
- US Department of Education Charter Schools Program: www.ed.gov/programs/charter/index.html

## II. THE EDUCATION FOR CHANGE WAY

### Our Vision

Education for Change intends to take the tools available to charter schools—increased flexibility and the opportunity to align schools around a common educational vision—and use them to transform Oakland's most failing elementary schools into high-performing communities of learning. By building a small community of schools based on a common educational program, and focused on the most underserved areas within one struggling district, we will be able to transform these schools more effectively and more dramatically than would be possible as individual schools.

Our schools will not struggle under the weight of isolation as they take on the tough work of bringing high performing schools to the children most dependent on public education. Instead we will offer a shared support system—tightly focused on the single purpose of continuous improvement of instruction—that will allow each of our schools to achieve more than would be possible alone. When we succeed in this task, our schools will perform at high levels, and our students will build the foundation required for success throughout their lives. Even more importantly, we will prove that a small community of schools can succeed in providing high-quality instruction to the most underserved, lowest income students in Oakland.

### Our Mission

The mission of Education for Change is to provide a superior public education to Oakland's most underserved children by creating a system of public schools that relentlessly focuses on student achievement through the continuous refinement of high quality instruction. If we do this, we will succeed in both preparing our students to make thoughtful and informed choices that will set them on a path for a successful life, and in creating a catalytic change across the country that transforms our urban public schools into high performing organizations for the children most dependent upon them. It is critical that all instructional staff understand that serving communities that have been underserved for decades is a serious commitment. Critical to our mission is the idea of a teacher not serving just a group of 20 or 30 students for a year but serving all the students for their entire K-5 experience.

### Our Core Beliefs

At Education for Change, our core beliefs are the foundation for our organization. We integrate strict and deliberate screening mechanisms into our hiring processes so that we hire only individuals, at all levels of the organization, who share our beliefs about what makes a great school—and what it takes for all children to succeed in school and in life. Just as we believe every adult within a school must be aligned around a common purpose and a shared set of goals to be successful, we also believe that our organization must be aligned around our shared sense of purpose and goals. Through a shared set of core beliefs, we will build one community of adults across multiple schools who share a common purpose. Our core beliefs are:

1. Every child has a right to a high quality, free, public education. We believe a school's ability to provide a high quality education to every child is dependent on the adults within the school.

2. Every student can learn and succeed at high levels. Many make this claim, and quickly qualify it behind closed doors or in quiet conversation. At Education for Change, we will succeed with every child. We believe not only that we can, but that we must succeed. No matter the circumstance, no matter the income level, no matter the race or religion, no matter the socio-economic position or the situation at home, we will succeed without making excuses.

3. The most important attribute of successful schools is the ability to have consistently high quality instruction in every classroom. This is only possible when the quality of instruction is continuously improved. We believe that education is one of the few areas within our society where the quality of the primary service—teaching young people—has been allowed to stagnate at a level of quality that was appropriate for a time long ago. This level of quality was sufficient at a time when children were sorted early for their life's work, and most did not need to continue their education beyond high school to earn a family-supporting wage. This time is gone. Our schools and much of their culture have developed over decades in ways where continuous improvement of the craft/art of teaching is optional at best, unheard of at worst. At Education for Change, our organization will be tightly focused on continuously improving our skill in imparting knowledge and teaching children. This is a simple yet revolutionary concept. We believe that a charter management organization aligned around the common purpose of providing high quality instruction and continuously improving upon classroom practice will succeed in creating great schools, where every child achieves at high levels.

4. Building a professional learning community is key. Continuous improvement of instruction is only possible through objective reflection, peer collaboration, and coaching from instructional leaders who are well versed in how to successfully impart instruction.

5. Every child will succeed when a school is organized around a coherent, comprehensive, rigorous, and standards-based curriculum, and school leaders make decisions about how to improve instruction based on data. When curriculum is directly linked to assessments used to measure the effectiveness of instruction, it enables data-driven decision-making around the refinement and improvement of instruction. When data informs the professional development of teachers, it enables and supports them in improving their craft.

6. The best measure of what we value is how we spend our time. Every instructional minute is precious. The organization of a school is primarily about how time, our most precious resource with our students, is used. We will invest the time required for effective, comprehensive professional development for our teachers that supports our collective expectation of high quality instruction.

7. Every adult within the school community—principals, teachers, staff, parents and administrators—is responsible for student performance. Together we will succeed in creating a high performing school for all of our students.

EFC expects to achieve our mission by focusing on:

1. **High Quality Teaching.**

   Every student deserves a high quality teacher in the classroom. EFC expects that teachers are committed to the belief that every student can achieve. EFC expects a commitment on the part of its teachers to continually strive toward high-level implementation of the core curriculum and high levels of student engagement. "Differentiated instruction" and "scaffolding" so all students can access the core curriculum, are vital components of high quality instruction. The goal of EFC is to create powerful, collaborative learning communities where high quality instruction is the ultimate goal. Through data analysis and grade level planning, teachers will be expected to collaborate with their colleagues to share their successes and challenges, to deepen their knowledge of instructional designs, and to continually work toward improving their instruction.

2. **Extended Time for Collaboration and Learning.**

   All teachers will have additional professional development and dedicated collaboration time to improve their instructional practices.

   Extended learning opportunities with aligned after school instructional programs will facilitate students' acquisition of grade level knowledge and skills, as well as broad extracurricular experiences that will prepare them for middle school and high school.

3. **Coherent, Comprehensive, Rigorous Standards Based Curriculum.**

   No school succeeds without focus, especially a school with educationally underserved students. EFC will implement a core curriculum using Open Court Reading and Saxon Mathematics. Teachers will implement these programs as designed, focusing on the systematic instruction underlying each program. Additionally, science and social studies will be offered as integrated components leveraging Open Court curriculum where themes will traverse subject areas. Teachers will be working as a team to analyze assessments more deeply and utilize the resulting data systematically to inform instructional practices.

4. **Choice & Commitment.**

   Students, their parents, and the faculty and administration are part of the school by choice. No one will be assigned or forced to attend the school. Everyone must make and uphold a commitment to the school and to each other to do what is required to achieve success. While no child is assigned to the school, EFC is deeply committed to serving

the children in the neighborhood. Thus all students who are interested in the school will be welcomed, unless the school is at capacity.

5. **Engagement of Community.**

EFC is an Oakland-based organization and as such is intent on engaging each school community and collaborating with local partners so that the whole child can be adequately developed. Lifelong learners are not just cultivated within the boundaries of the classroom nor solely in the core subjects. In order for true success for the larger student body to be achieved, the school must engage in consistent and meaningful dialogue and partnership with its community, reaching out to engage parents and other community members who often have not participated in the school community.

## Curriculum and Instructional Design

Presenting every student with a rigorous and coherent curriculum and high expectations for achievement is the foundation for learning. EFC will emphasize differentiated instruction to better meet each student's needs and deliver a much more personalized and effective educational experience for every student.

At this stage of our development, we have a clear and purposeful razor-like focus on English Language Arts and Math. Our number one priority is helping each of our students be proficient in these two areas. We firmly believe the foundation of the future success of our students lies in their skill development as communicators and problem solvers. As we continue to make advances in the proficiency levels of our students, we will begin to infuse more social science, science, music and art into our program. Although covering the depth and breadth of all grade appropriate standards is a positive goal, the reality of the length of the instructional day and year require that we strategically and coherently plan and collaboratively implement a powerful, focused plan based on the needs of our students. This will ensure their success.

Research demonstrates that building connections to adults, especially with dedicated and motivated teachers, also consistently leads to higher achievement. Each teacher will work with students utilizing assessment data to personalize the learning experience and target difficulties to be overcome. On a daily basis, teachers will be accountable for implementing lesson plans that are aligned with the academic program and with the schools' mission and values. Classroom observation and weekly check-ins by the schools' instructional support staff will be used as opportunities to explore successes in this area.

EFC will correlate its curriculum objectives to the California Content Standards adopted by the California State Board of Education. The schools' focus is not to change what the state feels are appropriate academic outcomes, but rather to ensure that all students master all areas of the California Content Standards. The California Content Standards will be combined with the pedagogical methodologies that have proven successful in other charter and traditional district schools. Clear and specific academic objectives will be mastered at each grade level as students move through the curriculum at EFC's intensified pace, addressing both the grade level standards and intensive intervention for those not at grade level.

## Methods of Instruction

EFC will work with the schools to develop instructional methods that will successfully maximize student learning. Students will acquire the knowledge and skills needed to pursue academic excellence, as well as the ability to independently apply, evaluate, and expand upon their knowledge.

The instructional designs that teachers will be expected to learn and incorporate into their practice include:

- transactional strategy instruction
- direct instruction
- mnemonics
- writing process
- inquiry instruction
- concept formation

Each instructional design or instructional technique is aligned to the purpose of the lesson. Thus, EFC would expect that instructional designs and techniques would be used as appropriate to the purpose of the lesson. Examples of instructional techniques that the school will likely implement include:

- whole-class instruction
- small group instruction
- individualized instruction
- cooperative learning (i.e., Theme Connections)
- paired repeated reading and feedback
- computer activities for inquiry
- educational excursions/study tours
- multi-sensory instruction such as songs and dances
- phonetic-based instruction

- balanced literacy
- research and inquiry projects

EFC teachers will teach to all levels of learning. Students whose needs have not been met through traditional teaching methods will benefit from a number of alternative instructional techniques, which may include pre-teaching, choral response, front-loading, role-playing, departmentalized teaching and other techniques. Additionally, teachers at the schools will continuously work together to enhance student learning by sharing, developing and refining effective teaching strategies.

**Professional Development**

As a cornerstone for all EFC schools, staff professional development will be developed and conducted with the intent of creating collaborative, supportive, continuous learning environments at each school. Just as we encourage our students to achieve through high expectations and by providing the best educational services possible, we look similarly at building this same culture of achievement, support, and quality for our teachers.

During the school year, staff development will continue through professional development days, whole staff meetings, and grade level team meetings. Professional development will typically take place during the Wednesday minimum day afternoons from 2:30 p.m. until 4:00 p.m. The Instructional Management Team will work with EFC's academic support team to determine session content based on identified school site needs. Some areas of training that have already been identified include:

- Deeper understanding of the educational theory and sharing of best practices around the Open Court program
- Delving into the instructional design of Open Court, Saxon Math and Language for Learning, Thinking, Writing
- Analyzing data to inform instruction
- Integration of arts, science and social studies with the Open Court program
- Effective ELL and AED strategies
- Developing a high quality, continuous learning environment

**Professional Development Time**

Every Wednesday from 2:30 p.m. to 4:00 p.m. is dedicated to professional development. Teachers are given 5 minutes between their prep time ending (2:25 p.m.) and the beginning of professional development (2:30 p.m.) to gather the materials necessary for professional development and to get to the location of the professional development. All professional

development will begin promptly at 2:30 p.m. When teachers give up part of their prep time to travel for a Wednesday PD they can choose to either: 1) have the prep time made up at another time 2) receive a $20 stipend at the end of the school year for each prep time missed due to travel.

Professional development is dedicated to improving our content knowledge and understanding of the instructional program. Our regular professional development time focuses on English Language Arts and Mathematics. Professional development is targeted at developing both content and pedagogical knowledge.

Data analysis is a critical component of our professional development model. Teachers are expected to analyze their data as part of a grade level process. Together they set goals, design instructional responses to the data, implement those instructional responses, monitor students progress and then assess whether the grade level has met their goals on the following assessment.

Data is also used in determining where the majority of instructional support is given. Starting last year, EFC began using a practice-based professional development model in English Language Arts where coaches co-teach with teachers for a unit of instruction. The focus of this practice-based professional development has been on improving comprehension and was termed Text Analysis. However, this same professional development model may be used to focus on other areas of instruction.

Grade Level Chairs involved in the Instructional Leadership Team are either on the Literacy Team or the Math Team. Each of these teams receives professional development with the support from Smar2tel in English Language Arts and the Math Coaches and ACOE in Math. These teams work to strengthen the implementation of the core instructional program in each content area.

To assure that faculty and staff participate in meaningful activity beyond the classroom, the Principal and the CAO (with other Home Office staff) will work with faculty and staff to plan time that will enhance their teaching and involvement in professional development. This work might include structured dialogues, conferences, workshops, school visits, peer observation and coaching, videotaping in the classroom, collaboration with partner organizations, or involvement in other projects designed to enhance one's professional skill and knowledge. In addition, administrators will observe the implementation of the professional development strategies and give faculty members feedback.

**Preparation and Collaborative Planning**

- **Preparation Time (commonly called "prep")**

  Preparation time is time for teachers to prepare for their teaching. This can include reading the Teacher Manuals, cognitively planning lessons, getting the necessary materials together, copying, etc. This also is a time when teachers can meet with parents, schedule pre- and post-observation conferences, meet with colleagues, etc. We officially

do not begin Wednesday prep time until 1:35 p.m. as we recognize that teachers may have parents who wish to speak to them immediately after school.

Preparation Time:

- ✓ 8:00 a.m. to 8:30 a.m. every day
- ✓ Wednesdays from 1:35 p.m. - 2:25 p.m.
- ✓ Once a week with a staffed prep release

The process of cognitively planning lessons is key to having a highly coherent program. Although some experienced teachers could prep more quickly for their individual class, it is our intent to use their expertise along with their grade level team to prep for the entire grade. Ultimately, all teachers prep for the entire school.

- **Collaboration Time**

Collaboration time (from 3:00 p.m. – 4:00 p.m., except Wednesdays, when it is part of the professional development block) is part of the planned structure of every day. Tuesdays are always designed for grade level collaboration in the form of a grade level meeting . Teachers are expected to attend the entire grade level meeting and to arrive on time for it. This time is to be spent collaboratively planning Open Court, Math or ELD with colleagues. Other uses for this time include: reading research articles and discussing them, watching DVDs an analyzing them, having a Reading or Math Coach conduct a component training, collaboratively planning the unit opener, reviewing the assessments, collaboratively scoring writing assessments, and discussing questions about instruction. If for any reason, a teacher cannot attend the grade level meeting he/she must clear it through the Principal and alert the grade level chair that he/she will not be available. In addition to the Tuesday grade level meetings, grade level chairs can call additional meetings for further instructional planning, grade level business (i.e.,planning a study tour), or to address grade level concerns. Mondays are held for Faculty meetings. Typically, Principals hold Faculty meetings once a month.

## III. CONDITIONS OF EMPLOYMENT

### General Professional Expectations

As a charter and reform-minded community of schools, EFC requires staff roles to be different from some traditional schools. EFC teachers and administrators will, at times, assume and incorporate new roles such as student mentor, activity leader, peer coach, problem solver, and team member. It is important that each staff member be accountable for his/her actions so that the intricate web of school functions remains intact. A breakdown in any part of this web puts great strain on all members of the school community. The school expects all staff to be professionals. The following professional expectations are the basis for staff to recognize and develop those attitudes and responsibilities necessary to function as a member of EFC. EFC staff will:

- Follow the EFC norms.
- Practice professional and respectful discourse in all communications with each other, students, parents, other community members and school partners. Staff will strive to consider others' points of view when identifying and solving problems. Whenever possible, we should seek to understand before we seek to be understood. Assume good intentions.
- Wear appropriate professional attire. Our professional reputation and atmosphere is maintained, in part, by the image that we present to the students, parents and community.
- Be on time to school, class, meetings and other scheduled events.
- Follow meeting norms, office norms and other agreed-upon norms.
- Model appropriate leadership and respectful behavior at school and all school events.
- Strive to support each other. Staff will go to the source when there is a conflict and use the appropriate and agreed-upon measures for conflict resolution.
- Maintain confidentiality for sensitive and/or confidential issues involving students and other staff.
- Be honest (e.g., in communications and on employment documents and time reports).
- Collaborate to create a positive learning environment for all that is focused on teaching and learning.
- Help maintain a safe work environment, one free of workplace injuries. This includes, among other things, not coming to work under the influence of alcohol or illegal drugs,

not possessing firearms or weapons at work, not engaging in physical aggression with any person at work, and not engaging in the willful destruction of property or material.

- Model punctuality and appropriate attendance for students. (EFC has a 98% attendance goal for students and staff.) In order to reward those who reach the 98% goal, EFC has established an incentive fund. A dollar amount is placed in a pool to be divided at the end of the year by those staff members who meet the 98% attendance goal. This allows EFC to save the money it would cost to hire substitutes for absent positions.

EFC takes professional expectations seriously as we want to create a positive place to work and learn.

## At-Will Employment Status

All employment at EFC is at-will. That means that either the employee or EFC may terminate the employment relationship at any time with or without advance notice, and with or without cause. Nothing in this Handbook shall limit the right to terminate at-will employment. No manager, supervisor, or employee of EFC has any authority to enter into an agreement for employment for any specified period of time or to make an agreement for employment on other than at-will terms. Only the CEO or the Board of Trustees has the authority to make any such agreement, which is binding only if it is in writing.

Generally, employees may also be demoted or disciplined and the terms of their employment may be altered at any time, with or without advance notice, and with or without cause, at the discretion of the Principal, CEO and/or the Board of Trustees.

The CEO or the Human Resources Designee/Manager and Principal jointly are the only representatives who have the authority to promise or enter into a written salary agreement or other employment contracts. To be enforceable, any commitment must be in writing and signed by both parties.

Salary agreements are generally made on an annual basis and are renewed in approximately May or June preceding the academic year. Staff members who do not intend to return to the school the following year should inform the Principal of that decision by April 1, and certainly no later than May 1.

## Job Duties

When you begin working at EFC, your supervisor will review your job description, responsibilities and the performance standards expected of you. Be aware that your job responsibilities may change at any time during your employment. From time to time, you may be asked to work on special projects, or to assist with other work necessary or important to the operation of your department or the organization. EFC depends on your cooperation and assistance in performing such additional work, and reserves the right to alter or change job responsibilities, reassign or transfer job positions, or assign additional job responsibilities.

School-site staff members are expected to attend all school arranged parent-teacher conferences, and to assume supervisory responsibilities at school events/activities. In addition, teachers are expected to share responsibility for attending Back to School Nights, Open House, Dates with Data, other school-wide events, and participating on school committees.

We know that at times, the administrators will need to be away from the schools. In this case, the Principal appoints a Teacher in Charge who will act as Principal in the absence of the administrators. The Teacher in Charge makes decisions for the administrators, except with regard to pupil suspension.

## Work Schedule

Following are work schedule expectations for all staff. There are some staff members (e.g., receptionists, custodians) whose specific job requirements demand their presence at certain times. Part-time staff may have other hours, as determined by their supervisor. Occasionally, there will be events that require attendance at non-school times of the day or week, and staff members are expected to be present.

- **School Staff Arrival Time**

  School-site staff is expected to be at school every work day at least 30 minutes before school begins in order to be ready for classes or work, or at the time directed for other school events/responsibilities. Other school-site staff, such as the School Office Manager and the Business Operations Manager may be required to be on campus earlier because of their specific job responsibilities.

- **School Staff Departure Time**

  Unless otherwise indicated or required, teachers are expected to be at school until 4:00 p.m. daily. We expect teachers will do significant instructional preparation and coursework correction at other times and locations. Meetings, committees, tutoring and other responsibilities may require additional time at school. All other management staff (including Home Office staff) and administrators are expected to be at the school (or office) until 4:30 p.m., although later hours will be needed frequently.

- **Home Office Arrival and Departure Time**

  Home Office staff is generally expected to be in the office from 8:30 a.m. to 4:30 p.m. unless arrangements are approved by one's supervisor. Longer hours will be required as needed.

## Meal and Rest Periods

As required by law, non-exempt employees who work five (5) hours/day or more are entitled to a 30 minute unpaid meal period approximately in the middle of the day. Non-exempt employees are allowed a 10-minute paid rest period for every four hours of work. Non-exempt employees

will be relieved of all active responsibilities during lunch periods and will not be compensated for that time. In addition, you may *not* work during your lunch period without prior authorization.

**Documentation Required Prior to Employment**

All EFC employees are responsible for submitting the following forms required either by our charters, insurance carriers, local law or state law: (a) a valid teaching certificate and transcripts for teachers; (b) a TB test; (c) fingerprints clearance; (d) employee benefit forms, if applicable; (e) a W-4 form; and (f) an I-9 Form. Other required forms are specified in our new hire checklist provided to new employees. In addition, all employees must consent to a background check as a condition of employment.

**Equal Opportunity Employer**

Education For Change is an equal opportunity employer and makes employment decisions on the basis of merit. EFC strives to hire the best available people for each job. EFC cultivates a work environment that encourages fairness, teamwork and respect among all employees. EFC is firmly committed to maintaining a work atmosphere in which people of diverse backgrounds and lifestyles may grow personally and professionally. EFC does not unlawfully discriminate on the basis of race, color, creed, citizenship, gender, religion, marital status, age, national origin or ancestry, veteran status, physical or mental disability, medical condition including genetic characteristics, sexual orientation, family care status, sex or any other basis protected by federal, state, or local laws.

EFC is committed to compliance with all applicable laws providing equal employment opportunities. This commitment applies to all persons involved in the operations of EFC and prohibits unlawful discrimination by any employee of EFC.

To comply with applicable laws ensuring equal employment opportunities to qualified individuals with a disability, EFC will make reasonable accommodations for the known physical or mental limitations of an otherwise qualified individual with a disability who is an applicant or an employee unless undue hardship would result.

**Policy Against Sexual Harassment**

All employees should be able to work in an atmosphere free of sexual harassment. EFC will not condone or tolerate sexual harassment of any type by any employee. This policy applies to all employee actions and relationships, regardless of position or gender. EFC will promptly and thoroughly investigate any complaint of sexual harassment and take appropriate corrective action, if warranted.

Sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexually suggestive nature constitute sexual harassment when:

1. Submission to such conduct is made either explicitly or implicitly a term or condition of employment.

2. Submission to or rejection of such conduct is used as the basis for personnel decisions, including but not limited to appraisals, promotion, salary increases, and termination.

3. Such behavior has the purpose or effect of interfering with an individual's performance on the job or creating an intimidating, hostile or offensive working environment.

Each supervisor has the responsibility to maintain a work place free from any form of sexual harassment. Consequently, should supervisors become aware of any conduct which may constitute sexual harassment or other prohibited behavior, immediate action should be taken to address such conduct.

Employees are expected to act in a positive and professional manner and to contribute to a productive work environment that is free from harassing or disruptive activity.

Prohibited conduct by anyone includes but is not limited to:

- Sexual flirtations, touching, advances or propositions;
- Verbal abuse of a sexual nature;
- Graphic or suggestive comments about dress or body;
- Sexually degrading words;
- The display in the workplace of sexually suggestive or offensive objects or pictures.

While in most situations a personal relationship is a private matter, these relationships are not appropriate in a professional setting, particularly where one of the parties has management or supervisory responsibilities.

Any employee who has experienced or is aware of a situation, which is believed to be sexually harassing, has a responsibility to report the situation immediately to the individual's manager and/or to the appropriate human resource representative. A Sexual Harassment Complaint Form may be obtained from your manager or the human resources representative. The human resource representative and the individual's manager will conduct an immediate investigation into the allegation(s) and determine whether the allegations have merit. A written report, including findings related to the allegations, will be completed. In all cases, when the allegation(s) is determined to be valid, appropriate remedial action will be taken immediately and may include disciplinary action up to and including termination.

If the alleged sexual harassment involves the employee's director or Supervisor, or if the employee is not satisfied with the outcome of the investigation, the employee should bring the matter to the attention of The Board of Directors.

All complaints of sexual harassment will be investigated promptly, objectively and as confidentially as possible. Employees are required to cooperate in any investigation. Retaliation against any employee for filing a complaint or participating in an investigation is strictly prohibited and shall be cause for termination.

All matters regarding this policy will be treated with confidentiality and on a need-to-know basis.

If EFC determines that unlawful harassment has occurred, effective remedial action will be taken in accordance with the circumstances involved. Any employee determined by EFC to be responsible for unlawful harassment will be subject to appropriate disciplinary action, up to, and including termination. A representative of the organization will advise all parties concerned of the results of the investigation. EFC will not retaliate against you for filing a complaint and will not tolerate or permit retaliation by management, employees or co-workers.

EFC encourages all employees to report any incidents of harassment forbidden by this policy immediately so that complaints can be quickly and fairly resolved. You also should be aware that the Federal Equal Employment Opportunity Commission and the California Department of Fair Employment and Housing investigate and prosecute complaints of prohibited harassment in employment. If you think you have been harassed or that you have been retaliated against for resisting or complaining, you may file a complaint with the appropriate agency. The nearest office is listed in the telephone book.

**Fraud Policy**

The corporate fraud policy is established to facilitate the development of controls which will aid in the detection and prevention of fraud against Education for Change. This policy applies to any fraud or suspected fraud involving employees as well as consultants, vendors, contractors, outside agencies doing business with employees of such agencies, and/or any other parties with a business relationship with Education for Change (also called EFC). Management is responsible for the detection and prevention of fraud, misappropriations, and other inappropriate conduct. Fraud is the intentional false representation or concealment of a material fact for the purpose of inducing another to act upon it to his or her injury. Any fraud that is detected or suspected must be reported immediately to the Director of Operations and Finance or the Chief Executive Officer, the parties responsible for coordinating all investigations involving suspected fraud. The employee or complainant may remain anonymous.

Suspected improprieties concerning an employee's moral, ethical or behavioral conduct should be resolved by departmental management or Human Resources. If there is any question, contact the Human Resources Manager for direction. EFC officers treat all information received confidentially. The reporting individual should not attempt to personally conduct investigations or interviews related to any suspected fraudulent act.

## Volunteers

EFC encourages the use of volunteers to support the work of the school. This may include, among other things, volunteering in the office, assisting in a classroom or the Academic Support Program, speaking, organizing an event or chaperoning.

As required by state law, any volunteers in significant contact with students are REQUIRED to undergo fingerprinting and TB testing. All volunteers must also sign a "hold harmless" form which is available from the Home Office or the School Office Manager. This is extremely important for the safety of our students. Parents of our students, however, are exempt from this "hold harmless" agreement.

## Child Abuse Reporting Requirements

All EFC personnel are mandated reporters of suspected abuse and/or neglect. Mandated reporters must report suspected child maltreatment *immediately* when they have "reasonable suspicion to believe that a child who is 17 years of age or younger and known to them in a professional or official capacity has been harmed or is in danger of being harmed – physically, sexually, or through neglect – and that a caregiver either committed the harm or should have taken steps to prevent the child from harm."

EFC shall provide training to all personnel regarding the obligations as mandatory reporters and the steps required to report suspected abuse.

California law requires that you acknowledge your understanding of child abuse reporting requirements and that you will comply with these laws. Child abuse is defined as a physical injury which is inflicted by other than accidental means, sexual abuse, willful cruelty or unjustifiable punishment, cruel or inhuman corporal punishment or injury, and negligent treatment or maltreatment under circumstances indicating harm, or threatened harm, to the child's health or welfare. The California Penal Code section and acknowledgement are in your employment materials and must be filed with the Home Office.

## Student Files

Student files are kept under the supervision of the School Office Manager. All files are confidential and may not be removed from the locked file cabinet without the express consent of the Office Manager. The school makes every attempt to access the cumulative files of every student, though it is often a lengthy process to obtain the information. When a student transfers out of EFC, the school will not release copies of the files without written notification from the requesting school.

## Confidentiality and Proprietary Information

The security of EFC property is of vital importance to EFC. School property includes not only tangible property, such as desks and computers, but also intangible property such as data and information. All employees share responsibility to ensure that proper security is maintained at all times. In the course of your work, you may have access to confidential information regarding EFC, its students, its suppliers, its customers, or perhaps even fellow employees. You have responsibility to prevent revealing or divulging any such information unless it is necessary for you to do so in the performance of your duties. Access to confidential information should be on a "need-to-know" basis and must be authorized by your supervisor.

## Technology and Security of Passwords

EFC has developed an email system, voice mail system, access to the Internet and other technology systems to assist employees in conducting EFC business. All information, data and messages created, received, sent or stored in these systems are, at all times, the property of EFC. These systems are to be used solely for business related purposes. EFC does not allow these systems to be used in creating, receiving, sending, or storing data that may reasonably be considered to be offensive, defamatory, obscene or harassing. EFC has software and systems in place that are capable of monitoring and recoding all community traffic to and from any computer employees may use. EFC reserves the right to inspect any and all files stored in all areas of the EFC community in order to assure compliance with this and other policies.

EFC relies on PowerSchool, a student information system, and other software to run mission critical functions of the school, such as student attendance, grades, scheduling, and transcripts. Each employee entrusted with a network ID and password, and/or access to PowerSchool, must carefully protect the assigned passwords, regularly change the passwords used, and use non-obvious passwords to avoid unauthorized access to the system. When leaving a computer unattended, always lock the workstation or shut down the machine to avoid unauthorized access by others on your account.

Employees must acknowledge their acceptance of EFC Acceptable Use Policy in order to use EFC technology resources.

## Electronic Communications

This policy describes EFC's guidelines with regard to the use of electronic mail, voice mail, Internet access and computer systems. This policy covers all EFC systems including all individual equipment (e.g., stand alone computers and laptops). These systems are important assets of EFC and have been installed at substantial expense to facilitate business communications.

EFC respects the individual privacy rights of its employees; however, employee privacy does not extend to the employee's work-related conduct or to the use of our equipment or supplies. EFC operates under this policy for several reasons including: (1) to ensure that these systems are only used for business purposes; (2) to follow up on departing employees' work-in-progress; (3) to ensure that the confidentiality of these trade secrets is being preserved; (4) to monitor employee performance; (5) to maintain the systems; and (6) to monitor our customer service and relations with outside business. You should be aware that the following guidelines might affect your privacy in the workplace.

Although each employee may have individual passwords to access these systems, the systems belong to EFC and the contents are to be accessible at all times by management for any business purpose. The systems may be subject to periodic unannounced inspections, and should be treated like other shared filing systems. All systems passwords must be given to EFC management and you may not use passwords that are unknown to your supervisor or Human Resources Manager. Of course, these systems are intended solely for business use. Employees should inform family members and friends not to use the systems for any confidential messages (e.g., confidential voice mail or e-mail messages).

Do not assume that messages and files are confidential. EFC has the capability to access, review, and copy or delete any messages sent, received or stored on the systems. EFC reserves the right to access, review, and copy or delete all such messages for any purpose and to disclose them to any party (inside or outside of EFC) it deems appropriate. Back-up copies of electronic mail messages, voicemail messages and computer files are maintained and referenced for business and legal reasons.

These systems may not be used in any manner that would be discriminatory, harassing or obscene, or for any other purpose which is illegal, against EFC policy or not in the best interests of EFC. Employees are not permitted to access the electronic communications of other employees or third parties unless directed to do so by EFC management. EFC reserves the right to access and review files and messages and to monitor the use of electronic communications as is necessary to insure that there is no misuse or violation of EFC policy or any law. Employees who misuse these communication systems will be subject to discipline up to and including termination.

Employees may not install personal software in EFC computer systems without prior written approval.

All electronic information created by any employee using any means of electronic communication provided by EFC is the property of EFC and remains the property of EFC.

Use of e-mail on the Internet to copy and/or transmit any documents, software or other information protected by copyright laws is prohibited.

Employees must exercise a greater degree of caution in transmitting EFC confidential information by e-mail than they take with other means of communicating information, (e.g., written memoranda, letters or phone calls) because of the reduced human effort required to

redistribute such information. EFC confidential information should never be transmitted or forwarded to outside individuals or companies not authorized to receive that information and should not even be sent or forwarded to other employees inside EFC who do not need to know the information.

Always use care in addressing e-mail messages to make sure that messages are not inadvertently sent to outsiders or the wrong person inside EFC. In particular, exercise care when using distribution lists to make sure that all addresses are appropriate recipients of the information. Lists are not always kept current and individuals using lists should take measures to ensure that the lists are current. Refrain from routinely forwarding messages containing company confidential information to multiple parties unless there is clear business need to do so.

Access to the Internet, Web sites and other types of EFC-paid computer access are to be used for EFC-related business only. The CEO must approve any information about EFC, its products or services, or other types of information that will appear in the electronic media about EFC before the information is placed on an electronic information source.

Any EFC provided laptops or portable computers are covered by this policy at all times. They are not to be used by employees for personal business activity.

Also, EFC strives to maintain a workplace that promotes a culture of respect. Therefore, EFC prohibits the use of computers, access to the Internet, and the E-mail system in ways that are disruptive, offensive to others, or harmful to morale.

For example, the display or transmission of sexually explicit images, messages, and cartoons is not allowed. Other such misuse includes, but is not limited to, ethnic slurs, racial comments, off-color jokes, or anything that may be construed as harassment or showing disrespect for others.

E-mail may not be used to solicit others for commercial ventures or purchases, religious or political causes, outside organizations, or other non-business matters or fundraising not approved by the CEO.

Remember that EFC purchases and licenses the use of various computer software for business purposes and does not own the copyright to this software or its related documentation. Unless authorized by the software developer, EFC does not have the right to reproduce such software for use on more than one computer.

Employees may only use software on local area networks or on multiple machines according to the software license agreement. EFC prohibits the illegal duplication of software and its related documentation.

Employees should notify their supervisor or Human Resources Manager upon learning of violations of this policy. Employees who violate this policy will be subject to disciplinary action, up to and including termination of employment.

## Cell Phone Policy

Cell phones (including ear pieces) of any type may not be used in the classroom during instructional time. If you have a camera-phone, you may not use the camera function in any areas where other employees and students may have an expectation of privacy. Also, EFC has the legitimate expectation that you will respect all confidential information when using your cell phone on EFC premises. Violation of either of these expectations may result in discipline up to and including release from at-will employment.

## News Media Contacts

Employees may be approached for interviews or comments by the news media. Only individuals specifically designated by the CEO or Principal may comment on behalf of EFC to news reporters regarding matters such as EFC policy or events relevant to EFC.

## Parking

Employees may park their vehicles in permissible public areas in the vicinity of EFC facilities. Employees may not use loading zones or parking areas specifically designated other vehicles. EFC is not responsible for any loss or damage to employee vehicles or contents while parked during EFC sessions, nor is it responsible for employees' parking violations.

## Solicitation and Distribution of Literature

In order to ensure efficient operation of EFC's business and to prevent disruption to students and employees, EFC has established control of solicitations and distribution of literature unrelated to EFC business on EFC property.

Employees may not solicit or disturb other employees for any reason whatsoever during working time and may not circulate, distribute, or post notices or other written material of any kind during working time or in working areas. "Working time" is when an employee should be performing his or her job duties. Non-working time includes rest or meal periods, before or after assigned work shifts, and other specified periods, if any, during the work day when employees are not expected to be performing their job duties.

Persons not employed by EFC may not solicit nor distribute literature for any purpose at any time without the express authorization of the Principal or CEO.

## Conflicts of Interest

All employees must avoid situations involving actual or potential conflicts of interest. Personal or romantic involvement with a competitor, supplier, or subordinate employee of EFC, which impairs an employee's ability to exercise good judgment on behalf of EFC, creates an actual or potential conflict of interest. Supervisor-subordinate romantic or personal relationships also can lead to supervisory problems, possible claims of sexual harassment, and morale problems.

An employee involved in any of the types of relationships or situations described in this policy should immediately and fully disclose the relevant circumstances to his or her immediate supervisor, or Human Resources Director, for a determination about whether a potential or actual conflict exists. If an actual or potential conflict is determined, EFC may take whatever corrective action appears appropriate according to the circumstances. Failure to disclose facts shall constitute grounds for disciplinary action.

EFC has no prohibition against hiring relatives of our staff members. However, to avoid potential conflicts of interest, relatives will not be hired, promoted, or transferred into positions in which there is a direct relationship between relatives. Relatives include the employee's spouse, children, parents, siblings, all in-laws, grandparents, grandchildren, stepparents, stepchildren, domestic partner, and any relative living in the household of the employee or domestic partner.

## IV. WORKPLACE SAFETY

### Health and Safety

The School is committed to providing and maintaining a healthy and safe work environment for all employees.

You are required to know and comply with the School's General Safety Rules and to follow safe and healthy work practices at all times. You are required to report immediately to your supervisor any potential health or safety hazards, and all injuries or accidents.

In compliance with Proposition 65, the School will inform employees of any known exposure to a chemical known to cause cancer or reproductive toxicity.

### Security Protocols

EFC has developed guidelines to help maintain a secure workplace. Be aware of unknown persons loitering in parking areas, walkways, entrances and exits and service areas. Report any suspicious persons or activities to security personnel or your supervisor. Secure your desk or office at the end of the day. When called away from your work area for an extended length of time, do not leave valuable or personal articles around your work station that may be accessible. The security of facilities as well as the welfare of our employees depends upon the alertness and sensitivity of every individual to potential security risks. You should immediately notify your supervisor when keys are missing or if security access codes or passes have been breached.

### Occupational Safety and Health

EFC will comply with applicable state and federal laws and regulations relating to Occupational Safety and Health.

Any employee(s) shall report to the Principal, any possible health or safety hazards so that EFC may resolve any such circumstances.

Like all citizens, EFC's employees do have the right to file anonymous OSHA complaints if they see a need that is not being addressed.

EFC agrees to take no retaliatory action against any employee for his/her actions in reporting possible health or safety hazards.

### Accident/Incident Reporting

It is the duty of every employee to immediately or as soon as is practical report any accident or injury occurring during work or on EFC premises so that arrangements can be made for medical or first aid treatment, as well as for investigation and follow-up purposes.

## Reporting Fires and Emergencies

It is the duty of every employee to know how to report fires and other emergencies quickly and accurately. Employees should report any such emergency by calling management. In addition, all employees should know the local emergency numbers such as 911.

## School Facilities and Security

EFC facilities are generally located in or near urban neighborhoods with higher than average crime rates. It is critically important that staff follow security procedures established for each school, and carefully protect keys, passwords, and other security related information.

## Inspection of Property

In order to help ensure the health and safety of EFC students and staff, EFC reserves the right to inspect School premises, as well as of any of the personal property of its employees on School premises during work hours. An employee's consent to such a search is required as a condition of employment. By signing the acknowledgement of receipt of this Handbook, employees understand that they do not have a reasonable expectation of privacy with regards to EFC property and personal property while on EFC premises.

## Drug Free Workplace

Employees are expected to remain drug free. "Drug free" shall be understood to mean free from the use of any illegal, non-physician prescribed drugs, alcohol, or other substances. Violation of this policy will not be tolerated. Use of these substances, whether on or off the job can detract from an employee's work performance, efficiency, safety, and health, and therefore seriously impair the employee's value to EFC. In addition, the use or possession of these substances on the job constitutes a potential danger to the welfare and safety of students and of other employees and exposes EFC to the risk of property loss or damage, or injury to other persons.

Employees shall not use, purchase, sell, transfer, or possess any form of illegal drugs or any type of drug paraphernalia on EFC property at any time or during working time in a professional capacity (e.g., with students) anywhere. Likewise, employees shall not possess or consume alcoholic beverages on EFC property or during work hours, including lunch and break periods. In addition, employees shall not report for work under the influence of drugs or alcohol.

Where a violation of this policy is suspected, an employee may be asked to submit to drug and alcohol screening and/or allow a search of his or her desk, work area, personal belongings, or vehicle. As stated earlier in this Handbook, an employee's consent to such a search is required as a condition of employment. Refusal to consent to a drug or alcohol screening or to allow a search of personal property will be considered to be insubordination and a basis for discipline, including possible release from at-will employment. . In addition, EFC will decide, based on all other available information, whether a violation of the drug or alcohol prohibition in this policy has occurred. Such a violation, if found, constitutes a separate and independent basis for

discipline or termination. EFC also may bring the matter to the attention of appropriate law enforcement authorities.

An employee's conviction on a charge of illegal sale or possession of any controlled substance while in the employment of EFC property will not be tolerated because such conduct, even while off duty, reflects adversely on EFC. In addition, EFC must keep people who sell or possess controlled substances off EFC premises in order to keep the controlled substances themselves off the premises.

Any employee who is using prescription or over-the-counter drugs that may impair the employee's ability to safely perform the job, or affect the safety or well-being of others, must notify a supervisor of such use immediately before starting or resuming work.

EFC will encourage and reasonably accommodate employees with alcohol or drug dependencies to seek treatment and/or rehabilitation. Employees desiring such assistance should request a treatment or rehabilitation leave. EFC is not obligated, however, to continue to employ any person whose performance of essential job duties is impaired because of drug or alcohol use, nor is EFC obligated to re-employ any person who has participated in treatment and/or rehabilitation if that person's job performance remains impaired as a result of dependency. Additionally, employees who are given the opportunity to seek treatment and/or rehabilitation, but fail to successfully overcome their dependency or problem, will not automatically be given a second opportunity to seek treatment and/or rehabilitation. This policy on treatment and rehabilitation is not intended to affect EFC's treatment of employees who violate the regulations described previously. Rather, rehabilitation is an option for an employee who acknowledges a chemical dependency and voluntarily seeks treatment to end that dependency.

On occasion, the EFC CEO may authorize the use of EFC premises for celebrations or gatherings wherein alcohol is served. Employees participating in these gatherings are expected to show good judgment and reasonable behavior with respect to alcohol.

## Lactation Accommodation

EFC will provide a reasonable amount of break time to accommodate an employee desiring to express milk for her infant child. The break time, if possible, must run concurrently with rest and meal periods already provided to the employee. EFC will make reasonable efforts to provide a room or other respectful location for an employee to express milk in private. This location may be a private room, if applicable. EFC may not be able to provide additional break time if doing so would seriously disrupt operations. Please speak to the Human Resources Director for additional information.

## Recycling, Waste Prevention, and Conservation

EFC actively recycles as many materials as possible. Please place aluminum cans, glass, white paper, and envelopes in the proper recycling bins. Recycling containers are located near computer printers, copiers, and in the staffroom. Please do your part to prevent waste, conserve resources, and recycle reusable materials.

## Workplace Violence

EFC is committed to providing a safe workplace. We want to minimize the risk of personal injury to employees and damage to property. We specifically discourage you from engaging in any physical confrontation with a violent or potentially violent individual. However, we do expect and encourage you to exercise reasonable judgment in identifying potentially dangerous situations and informing your supervisor or appropriate manager.

## Smoking

Pursuant to California law, no smoking will be allowed in school facilities or at school-related activities. Employees choosing to smoke must do so only during their break and/or lunch periods, and must do so away from school facilities.

## V. COMPENSATION AND BENEFITS

**Salary Basis Employee Classifications**

For salary administration purposes and to determine eligibility for certain employee benefits, EFC assigns employees to one or more of the following employment categories:

10 Month Staff
10 Month Staff members typically work a 186-208 day work-year. School-Year staff typically does not have scheduled work days between the end of June and mid-August. This category generally includes all classroom teachers and some other school-site staff.

Payroll schedule and medical benefits runs from September to August.

11 Month Staff
11 Month Staff members typically work from 200-208 days per year, depending on the position. These staff members typically do not have scheduled work days in the month of July. This category generally includes Reading Coaches and some other Intervention positions.

Payroll schedule and medical benefits runs from July to June.

12 Month Staff/Year-Round Staff
Year-Round staff typically works a 12 month work year. This category includes all Home Office and other support staff as school-site custodians.

Payroll schedule and medical benefits runs from July to June.

Full-Time Staff
Staff who are regular employees who are scheduled to work 8 hours per day and five days a week.

Part-Time Staff
Staff who are regular employees who regularly work less than 8 hours per day or less than five days per week.

Temporary Staff
Temporary staff is those working for less than 90 days. Temporary staff is not eligible for certain benefits, including health insurance, or paid time off.

Non-Exempt Staff (Eligible for overtime)
Under federal and state law, employees in certain types of jobs are entitled to overtime pay for hours worked in excess of eight (8) hours per day or forty (40) hours per workweek or for working seven consecutive days during the workweek. These employees are referred to as 'non-exempt' in this handbook. This means they are not exempt from (and therefore should receive)

overtime pay. Supervisors will approve any overtime hours in advance and submit appropriate documentation for payroll purposes.

Salaried Non-Exempt Employees (Eligible for overtime)
Salaried Non-Exempt employees are generally salaried, i.e., not paid on an hourly basis, and eligible for overtime for hours worked over eight (8) hours per day or 40 hours in a week. Supervisors must approve any overtime hours in advance and will submit appropriate documentation for payroll purposes.

Exempt Employees (Not eligible for overtime)
Exempt employees include professional staff, teachers, supervisors, and executives, and others whose duties and responsibilities allow them to be exempt from overtime pay provisions. Exempt employees are paid on a salary basis, and their salary already takes into account that long hours are necessary at times. Change in employment status may result from a job change, promotion, a change in working hours, or a change in a job description.

## Compensation

It is important to us that our compensation levels reflect the capabilities of our employees. It is EFC's objective to attract and retain talented and dedicated employees. EFC desires to pay all regular employees' wages and salaries that are competitive with other non-profit employers and local school districts. EFC has a teacher compensation system like that of traditional public school districts.

Classified employees' annual salary will be based on work experience and qualifications, and will be based on market rate salaries for similar positions. Classified employees will be paid on a semi-monthly basis.

Certificated employees (teachers only): compensation shall be determined based on the EFC Teacher Salary Schedule. Employees' annual salary will be based on verification of education and work experience, and will be paid in twelve (12) equal monthly payments, less statutory and other authorized deductions. The EMPLOYEE understands that his/her position is exempt from overtime under State and Federal law and other applicable wage and hour laws. Until Employee submits appropriate verification, employee will be paid at the equivalent of Step 1, Column 1.

- **Column and Step Movement (Teachers only)**

  Official transcripts must be submitted by October 1st for fall movement and February 1st for spring movement. EFC does not retroactively adjust salaries due to incomplete transcripts or receiving late documents. The EFC teacher salary schedule reflects compensation based on the number of semester units completed after the issuance of a Bachelor's Degree. One quarter unit is equal to 2/3 of a semester unit. Courses taken outside of a USA institution must state the amount of hours completed.

  EFC units for certain **preapproved** training can be earned at the rate of 1 unit per 15 hours of training. These units would be valid for EFC salary schedule purposes only.

Completion of a program without hours specified will not be accepted for movement.

- Teachers hired between September and December will receive step increases during the fall.

- Teachers hired between January and March will receive step increases in February (Spring Semester).

- Teachers hired between March and June will not receive a step increase until one school year of teaching experience. Example: If you are hired May 15, 2007 you would not move a step until the fall of 2008.

EFC does not reimburse for college course work taken during employment. Upper division courses to graduate maybe taken for column movement

- **Automatic Payroll Deposit**

  EFC requires automatic payroll deposit for all employees. Your paycheck will be deposited on or before the last business day of each month. To begin automatic payroll deposit, you must submit a direct deposit form and a cancelled check to the Home Office at least one (1) pay period before. The automatic deposit should begin with the second payroll following your submission of the cancelled check.

## Payroll Information

Paydays are generally scheduled on the last business day of each month. Your paycheck or pay stub will include an itemization of the various deductions required by law or authorized in writing by you. You should keep these statements for your personal records. Paychecks will be presented only to the named employee. Requests for special handling of your check in certain cases must be arranged in writing in advance with the Office Manager at the Site or the Home Office.

For non-exempt, hourly, temporary, or part-time employees (including substitute teachers), as well as full-time employees performing approved extra duties, timesheets should be kept from the 16th day of the month to the 15th day of the following month. Timesheets should be submitted to your supervisor for approval no later than the 15th (your supervisor will forward your approved timesheet to the Home Office for processing). If the 15th falls on a weekend or holiday, timesheets should be submitted on the school day closest to the 15th. You are responsible for accurately recording your time on your timesheet. Falsification of any time records is cause for disciplinary action, up to and including termination.

If you believe there is a mistake on your paycheck, notify your Human Resource Manager for submission to Home Office.

## Reimbursement/Purchasing Policy

EFC will pay reasonable expenses incurred in the course of an employee's work. Employees must obtain approval prior to incurring expenses on behalf of EFC to ensure the expenses are within budgetary guidelines. In order to receive reimbursement, all costs should be itemized on an expense report, signed by your supervisor and accompanied by actual receipts affixed to a full sheet of paper and submitted to the Home Office. Purchases made on behalf of EFC must be separated from personal items on the store receipt. All reimbursement reports must be completed in one calendar month of purchase.

EFC will reimburse employees for reasonable and necessary travel, accommodations, and other actual expenses incurred during the course of business travel. Use of an employee's personal automobile for company business will be reimbursed at the IRS-approved mileage reimbursement amount per mile after 'basic' miles are deducted. Basic miles are the number of round trip miles from home to your regular workplace.

Our EFC Operating Guidelines will contain more detailed information on our reimbursement and travel policies. If you have any questions about EFC's expense reimbursement policy, please contact your Principal, who is your liaison to the Home Office.

Employees requesting additional classroom supplies and/or instructional material must obtain approval prior to incurring expenses on behalf of EFC, to ensure the expenses are within budgetary guidelines.

## Group Benefits

EFC is committed to providing competitive benefits. The following benefits are currently provided to those employees meeting eligibility requirements (e.g., those employees classified as Full-Time and Part-time and working in excess of 32 hours per week). You are responsible for completing the necessary paperwork in a timely matter to ensure activation of your benefits. Also, please refer to the separate EFC benefits summary for more information. If there is any conflict between this Handbook and the official Summary Plan Descriptions ("SPD"s) or plan documents, the official SPDs and/or plan documents will govern.

Health coverage runs consistently with your work term dates.

10 Month Employees: September – August
11 Month Employees: July – June
12 Month Employees: July – June

- **Medical Insurance**

  Kaiser Permanente and HealthNet are our current medical providers. Currently EFC only offers open enrollment in Kaiser Permanente. EFC currently covers the entire cost of the medical plan for employees and their dependents. You will be given more information about the specific plans upon enrollment.

- **Dental Insurance**

  Dental benefits are provided by Delta Dental. EFC currently covers the entire cost of the dental plan for employees and their dependents. You will be given more information about the specific plans upon enrollment.

- **Vision Insurance**

  Vision benefits are provided by Vision Service Plan (VSP). EFC currently covers the entire cost of the vision plan for employees and their dependents. You will be given more information about the specific plans upon enrollment.

- **Employee Assistance Program (EAP)**

  Employee Assistance benefits are provided by Concern-EAP. EFC currently covers the entire cost of the EAP plan for employees and their dependents. You will be given more information about the plan.

- **Disability Insurance**

  All employees participate in California State Disability Insurance. The state designated amount is deducted from your paycheck.

  You are eligible to enroll in disability insurance from Standard Insurance. This program is designed to assist with your income should you become partially or totally disabled and are unable to perform the essential functions of your job. Partial salary replacement begins after a 7-day waiting period for Short-Term Disability or a 90-day waiting period for Long-Term Disability. Please see the Summary Plan Description.

- **Life Insurance**
  Life Insurance from Hartford is payable up to $10,000 in the event of your death, in accordance with the policy. You can indicate your beneficiary or beneficiaries by submitting the appropriate documents to Human Resources. You can change beneficiaries by submitting the change in writing.

- **COBRA**
  The federal Consolidated Omnibus Budget Reconciliation Act ("COBRA") gives you and your qualified beneficiaries the opportunity to continue health insurance coverage under our health plan when a "qualifying event" would normally result in the loss of eligibility. Some common qualifying events are: resignation, termination of employment, or death of an employee; a reduction in your hours or a leave of absence; your divorce or legal separation; and a dependent child no longer meeting eligibility requirements.

  Under COBRA, you or your beneficiary pays the full cost of coverage at our group rates, plus an administration fee.

You will be provided with a written notice describing your rights granted under COBRA when you become eligible for coverage under our health insurance plan. The notice contains important information about your rights and obligations.

**Health Insurance Portability**

Under the Health Insurance Portability and Accountability Act, you and your qualified beneficiaries are entitled to Certificates of Coverage from EFC when any of three circumstances are present. These Certificates allow you and your dependents to transfer from one employer health plan to another without starting a new pre-existing condition waiting period. The three conditions are:

- When you are no longer covered under the health plan, or you begin COBRA coverage (as in the case of extended leaves of absence or termination);
- At the time your COBRA coverage ends; and
- When a request is made within 24 months of termination of coverage.

The term "portability" does not mean you may take your specific health insurance policy from one job to another. It means that once you obtain health coverage, you will be able to use evidence of that insurance to reduce or eliminate any pre-existing medical condition exclusion period that might otherwise have been imposed on you when you move to another group health plan. Portability is designed to help people maintain coverage by giving them credit for having been covered previously.

You will be advised in writing of any pre-existing condition clause in your health insurance plan when you are hired. You may then request Certificate(s) from your previous employer (if applicable) to apply to your current plan. You may also request Certificate(s) from us under the conditions mentioned above when applicable.

**Domestic Partners Coverage**

EFC offers domestic partners insurance coverage. This policy gives you the opportunity to cover a long-term, significant non-spouse partner under our medical and dental plans. A domestic partnership will be recognized when it meets the provisions of Family Code Section 297 and when the couple has registered with the California Secretary of State.

**Unemployment Compensation**

Depending upon the circumstances, employees may be eligible for unemployment compensation upon termination of employment with EFC. Eligibility for unemployment compensation is determined by the State Employment Development Department and not by EFC.

## Retirement

EFC currently offers one of two mandatory retirement programs (depending on your job description and status), and an additional voluntary retirement program available to all employees.

- **Which Retirement Plan?**

  Mandatory participation: Full time non-teaching staff is automatically enrolled in the Public Employee Retirement System ("PERS"). Teachers working greater than 50% of full time are automatically enrolled in the California State Teachers Retirement System ("CalSTRS" or "STRS"). Special regulations dictate the participation of foreign teachers. In addition, any teacher or substitute already enrolled in STRS through a previous job must participate in STRS while working at EFC.

  Elective participation: Teachers working less than 50% of full time, who are not already members of STRS, can elect to participate in STRS. However, membership in STRS becomes mandatory if a teacher works more than 60 hours in any month. Similarly, substitute teachers who are not already members of STRS can elect to participate in STRS. Membership in STRS becomes mandatory for substitutes once they have served 100 days in any school year.

- **Public Employee Retirement System**

  For eligible staff, EFC offers PERS, a "defined benefit" retirement plan which covers most California classified employees. Employees contribute 7% of their salary, and EFC contributes 9.709% of the staff member's salary (these rates may change over time). PERS has a five year vesting period; once vested, members are eligible for retirement benefits based on a formula including the member's years of service and salary. Complete information on PERS is available at www.calpers.com.

  Accrued sick time from previous employers maybe carried over to EFC within 90 days of initial employment. It is the responsibility of the employee to contact a previous employer to obtain official documentation that lists the sick balances of previous work years. If a previous employer needs authorization from EFC please contact the Human Resources Manager.

- **California State Teachers Retirement System**

  For eligible staff, EFC offers STRS, a "defined benefit" retirement plan which covers most California public school teachers. Employees contribute 8% of their salary, and EFC contributes 8.25% of the teacher's salary (these rates may change over time). STRS has a five year vesting period; once vested, members are eligible for retirement benefits

based on a formula including the member's years of service and salary. Complete information on STRS is available at www.calstrs.com.

Accrued sick time from previous employers maybe carried over to EFC. It is the responsibility of the employee to contact a previous employer to obtain official documentation that lists the sick balances of previous work years. If a previous employer needs authorization from EFC please contact the Home Office.

- **Voluntary Supplemental Retirement Plans – 403(b)**

  EFC allows additional voluntary retirement plans for employees who wish to save additional money for retirement on a pre-tax basis. Participation is voluntary, and all employees are eligible to participate. Employees can specify a percentage of salary or a flat amount to be withheld from each paycheck (the IRS currently caps contributions at $15,000 per year for each plan).

  A limited list of 403B carriers is available for viewing.

- **Social Security**

  EFC does not participate in federal Social Security for certificated staff members.

## VI. EVALUATION AND RECORD KEEPING

### Support, Evaluation and Intervention

The support, evaluation, and intervention process for EFC faculty and staff is constantly being improved. More than an evaluation process, it is a philosophy. This process considers all aspects of the person at work: from the teacher in the classroom to the colleague in the faculty meeting or the staff person at a school or in the Home Office. Home Office Staff will also use the same process adapted for administrative functions. The evaluation process will typically occur annually.

The philosophy is that all staff can improve and that the evaluator is a support provider as well as an evaluator. Asking for help is valued because it helps others help you, the employee.

### Staff Feedback and Organization Participation

Employees (both classified and certificated) can volunteer to be a part of the EFC Leadership Council. The employees meet with the CEO once monthly and hear about new ideas and changes for the organization. This gives the CEO an opportunity to talk with employees directly about goals and concerns. It also gives employees an opportunity to express their opinions about issues and concerns and be part of problem solving within the organization.

Dine and Delve is another means for Home Office to employee communication link. Employees are invited to explore certain topics in depth and give suggestions for solutions and hear the thinking of the Home Office Team. **Please contact the Home Office if you need more information about Dine and Delve.**

Grade Level Chairpersons are appointed by the Principal to lead the grade level at each school and facilitate meetings. The Grade Level Chair meets regularly with the grade level team about math, language arts, ELD, school functions and reports to the Principal and Chief Academic Officer ("CAO"). The Grade Level Chair meets monthly with all the Grade Level Chairs at Date with Data. At this meeting, data is shared and a plan of action to improve instruction is developed and shared.

### Ongoing Support

EFC believes that being an educator is a professional role that can be enhanced through continued scholarship, collegial interaction, evaluation, goal setting, self-assessment, and involvement in educational work beyond the school.

EFC is committed to use faculty and staff development time to:

- Reflect on our own practice for improvement;
- Educate ourselves on current research and best practices; and

- Build collegiality through a structured system of collaborations, peer observations ("peer coaching") and other protocols.

**Formal Certificated Evaluations**

Formal evaluations for teachers will typically take place annually during a teacher's first two years, and then every other year or as needed (as determined by EFC in its sole discretion). Written evaluations of teachers will be completed by the Principal and be distributed during the final quarter of the academic year. New staff will be evaluated mid-year so that they can implement changes as needed and/or be reassured of their job effectiveness.
The Principal (or appropriate supervisor) will meet with the faculty member to discuss the evaluation. The person's self-assessment, as well as any informal observations or formal supervision notes created since the previous evaluation, shall be discussed during this meeting. Final evaluations will be placed in the person's personnel file. The person being evaluated may add additional comments for the file if desired. Please see Appendix I.

Formal observations shall include a minimum of three (3) scheduled observations to occur during the cycle; scheduled observations will include pre and post conferences; the first pre-conference will include a review of procedures and documents; and a minimum of two (2) non-scheduled observations to occur during they cycle.

Formal evaluations may also include evaluator's informal observations, review of appropriate documentation or participation in collaboration and professional development activities.

**Evaluation Cycle Dates**

Full Evaluation Cycle

| | | |
|---|---|---|
| Fall | Two full observation cycles | December 11, 2009 |
| Winter | One additional full observation cycle<br><br>Completion of Midterm Teacher Performance Rubric | February 19, 2010<br><br>February 26, 2010 |
| Spring | One additional full observation cycle<br><br>Completion of Final Teacher Performance Rubric | April 30, 2010<br><br>June 4, 2010 |

Submit original observations to Home Office.

**Formal Classified Evaluations**

Formal evaluations for classified staff occur twice each year (once in the fall and once in the spring). The evaluation process is used to recognize high levels of performance and to help all employees continue to grow as professionals.

Fall Window: October 1 – December 17

Spring Window: April 1 – June 4

**Personnel Files**

EFC maintains a personnel file on each employee. The personnel file includes such information as your job application, resume, records of training, documentation of performance appraisals and salary increases, and other employment records.

Personnel files are the property of EFC and are kept in a locked file. Access to the information they contain is restricted. Generally, only management personnel who have a legitimate reason to review information in a file are allowed access.

You may review your personnel records and your payroll records if you wish. If you would like to review these records, you should contact the Human Resources Manager. With reasonable advance notice, you may review your own personnel file in the School's offices and in the presence of the Human Resources Manager.

Any records containing medical information are kept in a separate file and they will not influence employment decisions about you without your permission.

EFC's records about you will not be disclosed in individually identifiable form to people or organizations outside EFC without your written approval unless disclosure is compelled for legal reasons. The only other exception will be to confirm you are or were an employee, the dates of your employment and your title or position. This information may be disclosed without your authorization in response to a request identifying you by name.

**Changes in Status**

All employees are required to notify the Administration office of any status changes including:

a) Name
b) Address
c) Marital status
d) Number of dependents
e) Telephone number (home, work, cell)
f) Person to be notified in case of emergency

g) Loss of driver's license, or restriction(s) in driving privileges
h) Felony arrest or pending charges or convictions

Since tax deductions, insurance benefits, and other administrative matters are often affected by changes in your personal status, it is very important that you notify the Home Office immediately in writing of any changes to your personal information, such as your name, address, telephone number, marital status, number of dependents, insurance beneficiaries, and names of persons to be notified in case of emergency.

## VII. HOLIDAYS, VACATIONS AND LEAVES

### General Policies Regarding Paid Time Off, Sick Days, and Personal Days

It is EFC's expectation that all employees make every effort to schedule appointments outside of regular work hours. In the event that is not possible to schedule a necessary appointment outside of regular hours, employees may use sick leave for medical appointments and request personal leave for other important appointments (i.e. court date or a residential emergency). Leave time is usually requested and used in half-day increments. Should you have a need for minimal amount of leave time during regular work hours your supervisor should be consulted to determine the best way to address the specific circumstances.

Staff must arrive at school, to class, and to meetings on time every day. We ask staff make every effort to avoid absences on days preceding or following school vacations or long weekends. We strongly discourage the families of EFC students from taking such days off, and it is important that we model the behavior we request. Similarly, since students are not allowed to attend an after-school activity on a day during which they have been absent, staff should avoid absences on days when their attendance is required after school.

Planned absences for medical and dental appointments are expected to be arranged, as much as possible, during non-school hours and must be taken on either half-day or full-day blocks.

The school staff has an obligation to make sure their responsibilities are covered, including arranging substitutes with the Home Office.

### Scheduled Holidays

EFC observes the following 12 holidays for all staff:

New Year's Day
Martin Luther King Jr.'s Birthday
President's Day
Cesar Chavez Day
Memorial Day
Independence Day
Labor Day
Veteran's Day
Thanksgiving Day
Friday after Thanksgiving Day
Christmas Eve
Christmas Day

When a holiday falls on a Saturday or Sunday it is usually observed on the preceding Friday or the following Monday. Specific holiday observance will be announced in advance.

Holidays are not counted as part of the work year.

**Vacation Time (custodians only)**

Vacation time for custodians is typically scheduled during the summer. At the supervisor's discretion a limited number of days maybe used at other times of the year. Any carryover of vacation days is not permissible without direct authorization from the CEO.

**Personal Necessity Days**

All full-time employees are entitled to up to five paid personal days off per year for any reason. Teachers hired mid-year are eligible for pro-rated personal leave. Employees must notify their supervisors as early as possible of their intention to use a personal day. Supervisors must report employees' use of personal days to the Home Office. It should be clear to all employees that personal days are to be used only in cases of necessity.

Staff must request personal days (paid or unpaid) at least 48 hours in advance. Personal days must be approved by the employee's supervisor. Approval is subject to school/organizational needs (i.e., substitute availability, number of staff out, etc.) Approval is limited to two requests for a particular day at each school site, and then may be approved only after all other classes are covered and if the requesting teacher secures coverage of her/his classes, and submits the plan for coverage along with her/his substitute plans.

Paid personal days will not be approved for the day before or after vacations (including the day before or after a three day weekend) nor on Staff Development Days. In addition, personal days may not be used consecutively. If a faculty or staff member wants to take a personal day on the day before or after a vacation, he/she may request an unpaid personal day. A request for an unpaid personal day will be considered on a case by case basis.

**Sick Leave**

In order to help prevent employees' loss of earnings that may be caused by accident or illness, EFC provides paid sick leave to all employees. Sick leave also may be used by employees for the purpose of securing necessary medical treatment. All full-time employees who work a 10 month work calendar are entitled to ten (10) days paid sick leave per year, 11 month employees who work a 11 month calendar are entitled to eleven (11) days paid sick leave per year, and 12 month employees who work a 12 month calendar are entitled to twelve (12) days paid sick leave per year, granted at the beginning of the employment year. Temporary employees are not entitled to sick leave benefits. Staff working more than half-time is eligible for pro-rated sick leave. Teachers hired mid-year are eligible for pro-rated sick leave.

Employees may use up to half of their annual grant of sick leave to attend to the illness of a child, parent, or spouse. However, such family-related sick leave usage is subject to all of the same conditions and restrictions which apply to each employee's use of earned sick leave for his or her own personal illness. For example, employees must give as much prior notice as possible of such need to be absent, are subject to the same verification of illness requirements, and are

subject to termination for any falsification of information related to such family illness sick leave usage.

Employees must notify their immediate supervisors of their need to take sick leave as soon as practicable and, in no event, no later than 30 minutes after their scheduled starting time.

EFC reserves the right to request verification from a health care provider for all absences due to illness or disability. Sick pay may be withheld if a satisfactory verification is not provided by the employee.

Eligible employees will receive pay at their normal base rate for any sick leave taken. However, no employee will receive pay in lieu of sick leave for any granted but unused sick leave at the close of any calendar year or at the time of termination.

For members of STRS or PERS unused sick leave counts toward service credit for retirement purposes. Accrued sick time from previous employers may be carried over to EFC. It is the responsibility of the employee to contact a previous employer to obtain official documentation that lists the sick balances of previous work years. If a previous employer needs authorization from EFC, please contact the Home Office.

**Workers' Compensation/Industrial Illness Leave**

EFC maintains a workers' compensation insurance policy for the benefit of all EFC employees with Star Insurance Company/MidWest Insurance. This policy provides compensation for lost wages and medical expenses resulting from an on-the-job injury. It covers work-related injuries only. The earnings benefit is provided only in those instances where the employee cannot immediately return to work as a result of his/her injury. Medical expenses are covered for any on-the-job injury that requires medical attention.

Any employee injured while performing work for EFC should report the incident immediately to his/her supervisor. The supervisor will complete an incident report and submit to the Home Office immediately. You are required to go to the EFC designated medical clinic to receive medical attention.

Workers' compensation coverage may be effective-upon the occurrence of a work-related injury; sick leave may be used during the waiting period.

It is important that all employees use caution on a daily basis while working. For example not using furniture for anything other than the purpose for what it was designed i.e. sitting on a table or standing on a chair.

**Personal Unpaid Medical Leave**

Any regular full-time employee who is temporarily disabled and unable to work due to a medical condition, will, upon request, be granted a leave of absence without pay for the period of his or her disability, provided such period shall not exceed 6 weeks, except where other laws require a

greater leave entitlement. The term "medical condition" as used in this policy encompasses all temporary medical disabilities including, but not limited to, pregnancy, childbirth, and related medical conditions.

As soon as you become aware of a need for a medical leave of absence, you should request a leave from your supervisor in writing. A physician's statement must be provided verifying the beginning and expected ending dates of your leave of absence. Any changes in this information should be promptly reported to your supervisor.

Except where other laws require a greater leave entitlement, eligible employees are normally granted leave for the period of the disability, up to a maximum of 6 weeks .You must take any available paid sick leave or paid time off as part of the approved period of leave. If paid time off or sick leave is used, the paid and unpaid portions of the leave will be added together to total 6 weeks.

You may also be eligible for State Disability Insurance ("SDI"). You may not apply Paid Family Leave benefits for your own disability.

Subject to the terms, conditions, and limitations of the applicable plans, health insurance benefits will be provided until the first day of the month following the first full month of disability. After that time, you will become responsible for the full costs of these benefits if you wish coverage to continue. When you return from medical leave, benefits will again be provided by EFC according to the applicable plans. If you sustain a work-related injury or illness, you are eligible for a medical leave of absence for the period of disability in accordance with all applicable laws covering occupational disabilities.

Holiday benefits will be suspended and vacation and sick leave benefits will not continue to accrue during the approved medical leave period.

Please notify EFC at least two weeks before the date you will be able to return to your job. Prior to returning to your position, you must provide a written release from your doctor on or before your return date.

When a medical leave ends, every reasonable effort will be made to return you to the same position, if it is available, or to a similar position for which you are qualified. However, EFC cannot guarantee reinstatement in all cases.

If you fail to timely report to work at the end of the medical leave, we will assume that you have terminated your employment in accordance with the policies herein.

**Family Care and Medical Leave**

This policy explains how EFC complies with the federal Family and Medical Leave Act ("FMLA") and the California Family Rights Act ("CFRA"), both of which require EFC to permit each eligible employee to take up to 12 workweeks of FMLA leave in any 12-month period for the birth/adoption of a child, the employee's own serious illness or to care for certain family

members who have a serious illness. For purposes of this policy, all leave taken under FMLA or CFRA will be referred to as "FMLA leave."

- Employee Eligibility Criteria

  To be eligible for FMLA leave, the employee must have been employed by EFC for the last 12 months and must have worked at least 1,250 hours during the 12-month period immediately preceding commencement of the FMLA leave.

- Events That May Entitle An Employee To FMLA Leave

  The 12-week FMLA allowance includes any time taken (with or without pay) for any of the following reasons:

  1. To care for the employee's newborn child or a child placed with the employee for adoption or foster care.

     Leaves for this purpose must conclude 12 months after the birth, adoption, or placement. If both parents are employed by EFC, they will be entitled to a combined total of 12 weeks of leave for this purpose.

  2. Because of the employee's own serious health condition (including a serious health condition resulting from an on-the-job illness or injury) that makes the employee unable to perform any one or more of the essential functions of his or her job (other than a disability caused by pregnancy, childbirth, or related medical conditions, which is covered by EFC's separate pregnancy disability policy).

  3. To care for a spouse, domestic partner, child, or parent with a serious health condition.

  4. A "serious health condition" is an illness, injury, impairment, or physical or mental condition that involves: (1) inpatient care (i.e., an overnight stay) in a hospital, hospice, or residential medical care facility, including any period of incapacity or any subsequent treatment in connection with such inpatient care; or (2) continuing treatment by a health care provider.

- Amount of FMLA Leave Which May Be Taken

  1. FMLA leave can be taken in one or more periods, but may not exceed 12 workweeks total for any purpose in any 12-month period, as described below, for any one, or combination of the above-described situations. "Twelve workweeks" means the equivalent of twelve of the employee's normally scheduled workweeks. For a full-time employee who works five eight-hour days per week, "twelve workweeks" means 60 working and/or paid eight-hour days.

2. The "12 month period" in which 12 weeks of FMLA leave may be taken is the 12 month period immediately preceding the commencement of any FMLA leave.

- Pay During FMLA Leave

1. An employee on FMLA leave because of his or her own serious health condition must use all accrued paid sick leave and may use any or all accrued paid vacation time at the beginning of any otherwise unpaid FMLA leave period.

2. An employee on FMLA leave for child care or to care for a spouse, domestic partner, parent, or child with a serious health condition may use any or all accrued paid vacation at the beginning of any otherwise unpaid FMLA leave.

3. All other FMLA leaves are unpaid leaves.

4. The receipt of vacation pay, sick leave pay, or State Disability Insurance benefits will not extend the length of the FMLA leave. Vacation pay and sick pay accrues during any period of unpaid FMLA leave only until the end of the month in which unpaid leave began.

- Health Benefits

The provisions of EFC's various employee benefit plans govern continuing eligibility during FMLA leave, and these provisions may change from time to time. The health benefits of employees on FMLA leave will be paid by EFC during the leave at the same level and under the same conditions as coverage would have been provided if the employee had been continuously employed during the leave period. When a request for FMLA leave is granted, EFC will give the employee written confirmation of the arrangements made for the payment of insurance premiums during the leave period.

- Seniority

An employee on FMLA leave remains an employee and the leave will not constitute a break in service. An employee who returns from FMLA leave will return with the same seniority he or she had when the leave commenced.

- Medical Certifications

1. An employee requesting FMLA leave because of his or her own or a relative's serious health condition must provide medical certification from the appropriate health care provider [on a form supplied by EFC]. Failure to provide the required certification in a timely manner (within 15 days of the leave request) may result in denial of the leave request until such certification is provided.

2. If EFC has reason to doubt the medical certification supporting a leave because of the employee's own serious health condition, EFC may request a second opinion

by a health care provider of its choice (paid for by EFC). If the second opinion differs from the first one, EFC will pay for a third, mutually agreeable, health care provider to provide a final and binding opinion.

3. Recertifications are required if leave is sought after expiration of the time estimated by the health care provider. Failure to submit required recertifications can result in termination of the leave.

- Procedures for Requesting and Scheduling FMLA Leave

1. An employee should request FMLA leave by completing a Request for Leave form and submitting it to the [Executive Director]. An employee asking for a Request for Leave form will be given a copy of EFC's then-current FMLA leave policy.

2. Employees should provide not less than 30 days' notice or such shorter notice as is practicable, for foreseeable childbirth, placement, or any planned medical treatment for the employee or his/her spouse domestic partner, child, or parent. Failure to provide such notice is grounds for denial of a leave request, except if the need for FMLA leave was an emergency or was otherwise unforeseeable.

3. Where possible, employees must make a reasonable effort to schedule foreseeable planned medical treatments so as not to unduly disrupt EFC's operations.

4. If FMLA leave is taken because of the employee's own serious health condition or the serious health condition of the employee's spouse, domestic partner, parent or child, the leave may be taken intermittently or on a reduced leave schedule when medically necessary, as determined by the health care provider of the person with the serious health condition.

5. If FMLA leave is taken because of the birth of the employee's child or the placement of a child with the employee for adoption or foster care, the minimum duration of leave is two weeks, except that EFC will grant a request for FMLA leave for this purpose of at least one day but less than two weeks' duration on any two occasions.

6. If an employee needs intermittent leave or leave on a reduced leave schedule that is foreseeable based on planned medical treatment for the employee or a family member, the employee may be transferred temporarily to an available alternative position for which he or she is qualified that has equivalent pay and benefits and that better accommodates recurring periods of leave than the employee's regular position.

7. [In most cases, EFC will respond to a FMLA leave request within two days of acquiring knowledge that the leave is being taken for an FMLA-qualifying reason and, in any event, within 10 days of receiving the request]. If an FMLA leave

request is granted, EFC will notify the employee in writing that the leave will be counted against the employee's FMLA leave entitlement. This notice will explain the employee's obligations and the consequences of failing to satisfy them.

- Return to Work

1. Upon timely return at the expiration of the FMLA leave period, an employee (other than a "key" employee whose reinstatement would cause serious and grievous injury to EFC's operations) is entitled to the same or a comparable position with the same or similar duties and virtually identical pay, benefits, and other terms and conditions of employment unless the same position and any comparable position(s) have ceased to exist because of legitimate business reasons unrelated to the employee's FMLA leave.

2. When a request for FMLA leave is granted to an employee (other than a "key" employee), EFC will give the employee a written guarantee of reinstatement at the termination of the leave (with the limitations explained above).

3. Before an employee will be permitted to return from FMLA leave taken because of his or her own serious health condition, the employee must obtain a certification from his or her health care provider that he or she is able to resume work.

4. If an employee can return to work with limitations, EFC will evaluate those limitations and, if possible, will accommodate the employee as required by law. If accommodation cannot be made, the employee will be medically separated from EFC.

- Limitations on Reinstatement

1. EFC may refuse to reinstate a "key" employee if the refusal is necessary to prevent substantial and grievous injury to EFC's operations. A "key" employee is an exempt salaried employee who is among the highest paid 10% of EFC's employees within 75 miles of the employee's worksite.

2. A "key" employee will be advised in writing at the time of a request for, or if earlier, at the time of commencement of, FMLA leave, that he/she qualifies as a "key" employee and the potential consequences with respect to reinstatement and maintenance of health benefits if EFC determines that substantial and grievous injury to EFC's operations will result if the employee is reinstated from FMLA leave. At the time it determines that refusal is necessary, EFC will notify the "key" employee in writing (by certified mail) of its intent to refuse reinstatement and will explain the basis for finding that the employee's reinstatement would cause EFC to suffer substantial and grievous injury. If EFC realizes after the leave has commenced that refusal of reinstatement is necessary, it will give the

employee at least ten (10) days to return to work following the notice of its intent to refuse reinstatement.

- Employment During Leave

  An employee on FMLA leave may not accept employment with any other employer without EFC's written permission. An employee who accepts such employment will be deemed to have resigned from employment at EFC.

**Pregnancy Disability Leave**

This policy explains how EFC complies with the California Pregnancy Disability Act, which requires EFC to give each female employee an unpaid leave of absence of up to four (4) months, as needed, for the period(s) of time a woman is actually disabled by pregnancy, childbirth, or related medical conditions.

- Employee Eligibility Criteria

  To be eligible for pregnancy disability leave, the employee must be disabled by pregnancy, childbirth, or a related medical condition and must provide appropriate medical certification concerning the disability.

- Events That May Entitle An Employee to Pregnancy Disability Leave

  The four-month pregnancy disability leave allowance includes any time taken (with or without pay) for any of the following reasons:

  1. The employee is unable to work at all or is unable to perform any one or more of the essential functions of her job without undue risk to herself, the successful completion of her pregnancy, or to other persons because of pregnancy or childbirth, or because of any medically recognized physical or mental condition that is related to pregnancy or childbirth (including severe morning sickness); or

  2. The employee needs to take time off for prenatal care.

- Duration Of Pregnancy Disability Leave

  Pregnancy disability leave may be taken in one or more periods, but not to exceed four months total. "Four months" means the number of days the employee would normally work within four months. For a full-time employee who works five eight hour days per week, four months means 88 working and/or paid eight hour days of leave entitlement based on an average of 22 working days per month for four months.

  Pregnancy disability leave does not count against the leave which may be available as Family Care and Medical Leave.

- Pay During Pregnancy Disability Leave

  1. An employee on pregnancy disability leave must use all accrued paid sick leave and may use any or all accrued vacation time at the beginning of any otherwise unpaid leave period.

  2. The receipt of vacation pay, sick leave pay, or state disability insurance benefits will not extend the length of pregnancy disability leave.

  3. Vacation pay and sick pay accrues during any period of unpaid pregnancy disability leave only until the end of the month in which the unpaid leave began.

- Health Benefits

  The provisions of EFC's various employee benefit plans govern continued eligibility during pregnancy disability leave and these provisions may change from time to time. When a request for pregnancy disability leave is granted, EFC will give the employee written confirmation of the arrangements made for the payment of insurance premiums during the leave period.

- Seniority

  An employee on pregnancy disability leave remains an employee of EFC and a leave will not constitute a break in service. When an employee returns from pregnancy disability leave, he or she will return with the same seniority he or she had when the leave commenced.

- Medical Certifications

  1. An employee requesting a pregnancy disability leave must provide medical certification from her healthcare provider on a form supplied by EFC. Failure to provide the required certification in a timely manner (within fifteen (15) days of the leave request) may result in a denial of the leave request until such certification is provided.

  2. Recertifications are required if leave is sought after expiration of the time estimated by the healthcare provider. Failure to submit required recertifications can result in termination of the leave.

- Requesting And Scheduling Pregnancy Disability Leave

  1. An employee should request pregnancy disability leave by completing a Request for Leave form and submitting it to her supervisor. An employee asking for a Request for Leave form will be referred to EFC's then current pregnancy disability leave policy.

2. Employee should provide not less than thirty (30) days or as much notice as is practicable, if the need for the leave is foreseeable. Failure to provide such notice is grounds for denial of the leave request, except if the need for pregnancy disability leave was an emergency and was otherwise unforeseeable.

3. Where possible, employees must make a reasonable effort to schedule foreseeable planned medical treatments so as not to unduly disrupt EFC's operations.

4. Pregnancy disability leave may be taken intermittently or on a reduced leave schedule when medically advisable, as determined by the employee's healthcare provider.

5. If an employee needs intermittent leave or leave on a reduced leave schedule that is foreseeable based on planned medical treatment, the employee may be transferred temporarily to an available alternative position for which he or she is qualified that has equivalent pay and benefits that better accommodates recurring periods of leave than the employee's regular position.

6. In most cases, EFC will respond to a pregnancy disability leave request within two (2) days of acquiring knowledge that the leave qualifies as pregnancy disability and, in any event, within ten (10) days of receiving the request. If a pregnancy disability leave request is granted, EFC will notify the employee in writing and leave will be counted against the employee's pregnancy disability leave entitlement. This notice will explain the employee's obligations and the consequences of failing to satisfy them.

- Return To Work

1. Upon timely return at the expiration of the pregnancy disability leave period, an employee is entitled to the same position unless the employee would not otherwise have been employed in the same position (at the time reinstatement is requested). If the employee is not reinstated to the same position, she must be reinstated to a comparable position unless there is no comparable position available, but filling that position with the returning employee would substantially undermine EFC's ability to operate the business safely and efficiently. A "comparable" position is a position that involves the same or similar duties and responsibilities and is virtually identical to the employee's original position in terms of pay, benefits, and working conditions.

2. When a request for pregnancy disability leave is granted to an employee, EFC will give the employee a written guarantee of reinstatement at the end of the leave (with the limitations explained above).

3. Before an employee will be permitted to return from a pregnancy disability leave of three days or more, the employee must obtain a certification from her healthcare provider that she is able to resume work.

4. If the employee can return to work with limitations, EFC will evaluate those limitations and, if possible, will accommodate the employee as required by law. If accommodation cannot be made, the employee will be medically separated from EFC.

- Employment During Leave

  An employee on pregnancy disability leave may not accept employment with any other employer without EFC's written permission. An employee who accepts such employment will be deemed to have resigned from employment with EFC.

**Paid Family Leave (Wage Replacement Benefits)**

Paid Family Leave ("PFL") does not create the right to a leave of absence but is part of the State Disability Insurance program which provides wage replacement benefits for eligible employees. California employees may file a claim for up to six (6) weeks of PFL benefits with the Employment Development Department ("EDD") within a 12 month period to take time off work to care for a child, spouse, parent or domestic partner or the child of a domestic partner with a serious health condition, or to bond with a newborn or a child under eighteen (18) who has been placed in their home by adoption or foster care. The plan will provide benefits of approximately 55% of lost wages after a 7-day waiting period. This leave is sponsored within the State Disability Insurance ("SDI") program and funded through employee contributions.

If you are eligible for either federal Family Medical Leave Act ("FMLA") and/or California Family Rights Act ("CFRA") leave, both of these leaves will overlap with your receipt of PFL benefits and you will be reinstated to the same position, or to a similar available position for which you are qualified. If you are not eligible for FMLA or CFRA, then reinstatement is not guaranteed.

PFL does not apply to your own illness or injury nor can benefits be applied to time off under medical leave, workers' compensation leave or pregnancy disability leave. Before collecting paid time off under Paid Family Leave, you must serve a seven (7)-day unpaid waiting period. If you have accrued unused vacation, you may apply one (1) week to the otherwise unpaid waiting period. You may apply accrued but unused sick leave but are not required to do so.

Subject to the terms, conditions, and limitations of the applicable plans, health insurance benefits will be provided until the first of the month following the first full month of leave. After that time, you will become responsible for the full costs of these benefits if you wish coverage to continue. When you return from Paid Family Leave, benefits will again be provided according to the applicable plans.

**Bereavement Leave**

Bereavement leave of up to three (3) days with pay will be granted to regular employees, upon request and approval by the Human Resources Manager, in the event of a death of the

employee's spouse, child, parent, parent-in-law, grandparent, grandparent-in-law, granddaughter, grandson, daughter-in-law, son-in-law, stepparent, domestic partner, brother, sister, brother-in-law, sister-in-law, stepchild, or domestic partner's child, and any relative living in the household of the employee or domestic partner. If you must travel to another state, up to (5) days will be granted upon request and approval. Personal days or non-scheduled days may be used in the event of a death of others not listed.

**Time Off for School Children**

Employees are encouraged to participate in the school activities of their child(ren). Parents, guardians, or grandparents having custody of schoolchildren are provided unpaid time off to participate in school or day care activities. EFC may require proof of your participation in these activities. You may use accrued vacation or unpaid time off for this purpose. Please provide reasonable notice to your supervisor before taking time off for schoolchildren.

**Military Leave of Absence**

Any employee who is in any branch of the uniformed services or a similar government military operation may take military service leave for military duty for up to five (5) years. Advance notice is required to maintain such a leave status. Available time off may be used for the absence as military service leave is unpaid. For teaching staff a request must first be made to serve the time when school is not in session. Sick time and holiday benefits will not accrue during a military service leave.

**Domestic Violence Crime Victims Leave**

Victims of domestic violence and sexual assault may take time off work to obtain help from a court, seek medical attention, obtain services from a shelter, program, or crisis center, obtain counseling, or participate in safety planning. You may also assist a member of your immediate family who has been a victim. EFC may require proof of your participation in these activities. You may use accrued vacation or granted sick leave or time without pay. When possible, give your supervisor reasonable notice.

**Jury and Witness Duty**

Staff should notify their supervisor and the Home Office upon receipt of a jury summons. In order to maximize student education and school efficiency, staff must, whenever possible, request and use options such as on-call status or postponement to school vacation times such as summer. Staff is also expected to report to work as soon as the court releases them each day if there are any work hours left in the school day. EFC permits you to take the necessary time off and wishes to help you avoid any financial loss because of such service. Except as otherwise required by law, EFC will continue your salary or pay during jury service for a maximum of five business days. Beyond five days, non-exempt employees will serve jury duty on an unpaid basis and exempt employees will be paid for any week in which they do any work.

Staff required by law to appear in court as a witness may take personal days or unpaid days for such purpose. EFC requests that advance arrangements be made with their supervisor and the Home Office, and any necessary substitute plans are taken care of. Please submit a copy of your jury service verification to Home Office.

**Leave for Volunteer Firefighters and Emergency Personnel**

If you are a volunteer firefighter, reserve peace officer or other type of emergency rescue personnel, you are entitled to take up to fourteen (14) days off per calendar year to perform your duties, or to engage in fire or law enforcement training. Leave is unpaid but you may apply any accrued paid time off to your absence.

If you receive notice that you must report for duty prior to coming to work, or leave work after you have come to work, you must inform your immediate supervisor as soon as possible, stating the amount of time you expect to be gone, if possible. You are expected to come back to work as soon as you are able to do so.

**Voting Time Off**

You are encouraged to fulfill your civic responsibilities by participating in elections. Generally, employees are able to find time to vote either before or after their regular work schedule. If you are unable to vote in an election during your non-working hours due to your work schedule, we will grant you up to two (2) hours of paid time off to vote.

You should request time off to vote from your supervisor at least two (2) working days prior to the Election Day. Time off will be scheduled at the beginning or end of the workday, whichever provides the least disruption to the normal work schedule.

You must submit a voter's receipt to your supervisor on the first working day following the election to qualify for paid time off.

## VIII. DISCIPLINE AND TERMINATION

### Discipline and Rules of Conduct

**Rules of Conduct**

The following conduct is prohibited and will not be tolerated by EFC. This list of prohibited conduct is illustrative only and applies to all employees of EFC; other types of conduct that threaten security, personal safety, employee welfare and EFC operations also may be prohibited. Further, the specification of this list of conduct in no way alters the at-will employment relationship as to at-will employees of the School. If an employee is working under a contract with the School which grants procedural rights prior to termination, the procedural terms in the contract shall apply.

1. Insubordination - refusing to perform a task or duty assigned or act in accordance with instructions provided by an employee's manager or proper authority.
2. Inefficiency - including deliberate restriction of output, carelessness or unnecessary wastes of time or material, neglect of job, duties or responsibilities.
3. Unauthorized soliciting, collecting of contributions, distribution of literature, written or printed matter is strictly prohibited on EFC property by non-employees and by employees. This rule does not cover periods of time when employees are off their jobs, such as lunch periods and break times. However, employees properly off their jobs are prohibited from such activity with other employees who are performing their work tasks.
4. Damaging, defacing, unauthorized removal, destruction or theft of another employee's property or of EFC property.
5. Fighting or instigating a fight on EFC premises.
6. Violations of the drug and alcohol policy.
7. Using or possessing firearms, weapons or explosives of any kind on EFC premises.
8. Gambling on EFC premises.
9. Tampering with or falsifying any report or record including, but not limited to, personnel, absentee, sickness or production reports or records, specifically including applications for employment and time cards.
10. Recording the clock card, when applicable, of another employee or permitting or arranging for another employee to record your clock card.
11. Use of profane, abusive or threatening language in conversations with other employees and/or intimidating or interfering with other employees.
12. Conducting personal business during business hours and/or unauthorized use of telephone lines for personal calls.
13. Excessive absenteeism or tardiness excused or unexcused.
14. Posting any notices on EFC premises without prior written approval of management, unless posting is on an EFC bulletin board designated for employee postings.
15. Immoral or indecent conduct.
16. Conviction of a criminal act.
17. Engaging in sabotage or espionage (industrial or otherwise)
18. Violations of the sexual harassment policy.

19. Failure to report a job-related accident to the employee's manager or failure to take or follow prescribed tests, procedures or treatment.
20. Sleeping during work hours.
21. Release of confidential information without authorization.
22. Any other conduct detrimental to other employees or EFC's interests or its efficient operations.
23. Refusal to speak to supervisors or other employees.
24. Dishonesty.

**Separation of Employment**

- **Termination Documentation**

  EFC shall attempt to provide written notice to employees regarding release from at-will employment.

- **Exit Interview**

  Employees who leave EFC for any reason, including at the end of a contract year, may be asked to participate in an exit interview. This interview is intended to permit terminating employees the opportunity to communicate their views regarding their work with EFC. At the time of the exit interview or before, the employee is expected to return all EFC-furnished property, such as keys, computer equipment and ID cards.

  During the exit interview, you can provide your reasons for leaving, other impressions, and insights into areas for improvement that the EFC can make. Certain information may be considered confidential. An exit interview will be scheduled with the Human Resources Director.

- **Staff Resignation Process**

  EFC may also consider that an employee has voluntarily terminated his or her employment if: (a) the employee fails to return from an approved vacation or leave on the date agreed upon; or (b) the employee fails to report for work without notice for three (3) consecutive days.

  All EFC-owned property, including vehicles, computers, instructional materials, equipment, supplies, keys, security system fobs, uniforms, identification badges, and credit cards, must be returned immediately upon termination of employment.

## IX. COMPLAINTS AGAINST PERSONNEL

**Resolution Support**

All EFC faculty and staff are expected to work to create a positive atmosphere. This means that each of us must attempt to resolve issues of concern directly and in a supportive manner. The following resolution process is designed to have issues of concern resolved and to have successful faculty and staff. Please note that this policy does not apply to: (1) personnel actions; (2) complaints of harassment or discrimination, which are governed separately by the Anti-Harassment Policy included in this Handbook; or (3) other situations requiring immediate response as determined in EFC's sole discretion. The Director of Site Services/Essentials Initiative will act as the point person in the resolution process. The resolution process is:

1. Go to the source. This means going directly to the person with whom you have an issue or concern if you are comfortable doing so. Ask clarifying questions and attempt to resolve the issue. If this first step is not successful, then proceed to the next step of the resolution process.

2. Document your efforts and consider using a voluntary resolution team. The team will be comprised of the peer coaching teams when they are implemented, and/or a team of several teachers chosen by the person being supported by the resolution process if the peer coaching teams are not yet implemented. All discussions should be treated as private and confidential, and should not be discussed by members of the Resolution Team with others outside of the team, except for discussion as needed with the Principal, Director of Site Services/Essentials Initiative, and other members of the Home Office dealing with personnel issues.

   The Voluntary Resolution Team. This is a voluntary step in the process and, if the person involved does not wish to share the issues of concern with the members of a Resolution Team, the person may proceed directly to Step #3, below. If the person involved wishes to proceed with this step, the peer coaching team should be consulted to determine if all concerned want to form a Resolution Team. If three or more people from the peer coaching team wish to be involved, they will form a resolution team. If there are not three or more people who wish to do so, the peer coaching team (with the consent of the person involved) will find three other people to form a Resolution Team. In no event will a member of the Resolution Team be the subject of the complaint. Once formed, the Resolution Team will develop goals, a plan and a timeline with the person involved. This process will be documented by the Resolution Team and a copy will be provided to the Principal. If this second step is not successful, then proceed to the next step of the resolution process.

3. Use an Administrative Team. In this step, either the person involved goes directly to the Administrative Team after Step #1, or the Resolution Team described in Step #2 transfers responsibility and documentation to an Administrative Team (including the Principal and possibly the Vice Principal and a Home Office designee). This team will follow the same process of developing goals, a plan and a timeline with the faculty or staff member

involved. This process will be documented by the Administrative Team and a copy will be provided to the Director of Site Services/Essentials Initiative. If this third step is not successful, then proceed to proceed to the next step of the resolution process.

4. The Principal may need to take action. The Principal, with possibly the Vice Principal and/or Director of Site Services, will meet with the staff member to give him/her a chance to present his or her position. The staff member may have a colleague present if desired at the time of the presentation, although all matters discussed and involved are private and confidential, and should not in any case be shared further. After consultation with the Director of Site Services, the Principal will make a recommendation to the CEO, up to and including release from at-will employment with EFC.

NOTE: Because the Principal and Vice Principal are involved in the last two steps of the intervention process, there is a similar but slightly different process when these employees are the subjects of the complaint. The Home Office will use a similar process.

The process for issues involving the Principal is as follows.

1. Go to the source (Principal) for attempted resolution.

2. Contact the supervisor at the Home Office or CEO. The supervisor or CEO will decide, much like the faculty and staff process, whether to create a voluntary Resolution Team.

3. If this effort is unsuccessful, or if the person involved does not want a voluntary Resolution Team, the supervisor or CEO will consider further action.

The process for the Vice Principal is similar.

1. Go to the source (VP) for attempted resolution.

2. Contact the Principal if this is unsuccessful. The Principal will decide, much like the faculty and staff process, whether to create a voluntary Resolution Team.

3. If this is unsuccessful, the Principal will consider further action with the Home Office, and make a final decision.

The same is true if there is an issue with a person from the Home Office.

1. Go to the source and, only if the matter remains unresolved, go to the supervisor.

2. In the case of the CEO, after going to the source (CEO), contact the Chair of the Board of Trustees.

Note: This resolution process does not change any EFC employee's employment status. Nor does it guarantee any rights or process prior to a disciplinary decision or release from at-will employment.

## Open Door Policy

Suggestions for improving EFC are always welcome. At some time, you may have a complaint, suggestion, or question about your job, your working conditions, or the treatment you are receiving. We want to hear your good-faith complaints, questions, and suggestions. If you wish to raise an issue, please take the following steps:

- Bring the situation to the attention of your immediate supervisor, who will then investigate and provide a response or explanation.

- If the issue persists, you may describe it in writing and present it to the Human Resources Manager, who will investigate and provide a response or explanation. We encourage you to bring the matter to the Human Resources Manager as soon as possible after you believe that your immediate supervisor has failed to resolve it.

- If the issue is not resolved, you may present it in writing to the CEO, who will attempt to reach a final resolution.

This procedure, which we believe is important for both you and EFC, cannot guarantee that every problem will be resolved to your satisfaction. However, EFC values your observations and you should feel free to raise issues of concern, in good faith, without the fear of retaliation.

## APPENDIX A

## SEXUAL HARASSMENT COMPLAINT FORM

*It is the policy of EFC that all of its employees be free from sexual harassment. This form is provided for you to report what you believe to be sexual harassment, so that EFC may investigate and take appropriate disciplinary or other action when the facts show that there has been sexual harassment.*

*If you are an employee of EFC, you may file this form with the Director or Board President.*

*Please review EFC's policies concerning sexual harassment for a definition of sexual harassment and a description of the types of conduct that are considered to be sexual harassment.*

*EFC will undertake every effort to handle the investigation of your complaint in a confidential manner. In that regard, EFC will disclose the contents of your complaint only to those persons having a need to know. For example, to conduct its investigation, EFC will need to disclose portions of your factual allegations to potential witnesses, including anyone you have identified as having knowledge of the facts on which you are basing your complaint, as well as the alleged harasser.*

*In signing this form below, you authorize EFC to disclose to others the information you have provided herein, and information you may provide in the future. Please note that the more detailed information you provide, the more likely it is that EFC will be able to address your complaint to your satisfaction.*

*Charges of sexual harassment are taken very seriously by EFC both because of the harm caused to the person harassed, and because of the potential sanctions that may be taken against the harasser. It is therefore very important that you report the facts as accurately and completely as possible and that you cooperate fully with the person or persons designated to investigate your complaint.*

Your Name: _____ Date: _____

Date of Alleged Incident(s): _____

Name of Person(s) you believe sexually harassed you or someone else: _____

_____

List any witnesses that were present: _____

_____

Where did the incident(s) occur? _____

Please describe the events or conduct that are the basis of your complaint by providing as much factual detail as possible (i.e. specific statements; what, if any, physical contact was involved; any verbal statements; what did you do to avoid the situation, etc.) (Attach additional pages, if needed):

_____

_____

_____

_____

_____

_____

_____

I acknowledge that I have read and that I understand the above statements. I hereby authorize EFC to disclose the information I have provided as it finds necessary in pursuing its investigation.

I hereby certify that the information I have provided in this complaint is true and correct and complete to the best of my knowledge and belief.

_____ Date: _____

Signature of Complainant

_____

Print Name

Received by: _____ Date: _____

Education for Change
Corporate Office:
303 Hegenberger Rd. Ste. 301
Oakland, Ca 94621

# EFC Laptop Responsibility Contract and Consent Form

I acknowledge receiving a laptop computer for Education for Change, Inc. ("EFC") business use while I remain in the employment of EFC. I have read, signed and agree to abide by the EFC Computer Acceptable Use Policy. In order to maintain the laptop use privilege, I agree to the following responsibilities:

Please initial each applicable line:

_____I agree to keep this laptop computer in my sole possession at all times. I will not give or lend it to anyone, except to return it to EFC for upgrades, network connection updates, or repair in case it is damaged. Similarly, I will not permit others to utilize this laptop computer.

_____I agree to carry this laptop in a padded case or backpack and to take other reasonable safety precautions in order to minimize the chances that it will be damaged or destroyed.

_____(Instructional staff only) I will secure my laptop in the locker provided in my room at the end of each school day.

_____(Instructional staff only) During the school day, I will lock my room to secure the laptop in my absence.

_____I agree to promptly turn in my laptop to EFC whenever requested for occasional maintenance, updates, or repairs.

_____If my laptop is lost, stolen, damaged, or malfunctioning, I will immediately notify EFC.

_____I agree to return this laptop to EFC before my employment with Education for Change, Inc. is terminated.

_____I understand that failure to comply with any of these rules and policies will result in the suspension of my use of this laptop.

_____I understand that brief and occasional personal use of the laptop is acceptable only as long as it is not excessive or inappropriate, occurs during personal time, and does not result in expense to EFC.

Education for Change
Corporate Office:
303 Hegenberger Rd. Ste. 301
Oakland, Ca 94621

# EFC Laptop Responsibility Contract and Consent Form

Please initial for all items received:

_____ Laptop - Please list: Manufacturer_____ Model Number_____ Serial Number_____

_____ Power Supply (A/C adapter)

_____ Case and/or other accessories

– please list here: _____

Staff Name: _____

Staff Signature: _____Date:_____

Witnessed and Acknowledged by:

_____

Education for Change
Corporate Office:
303 Hegenberger Rd. Ste. 301
Oakland, Ca 94621

# EFC Equipment Accountability Sign-out Form

## 1.0 Overview

EFC is committed to the protection of its employees, partners and the company from illegal or damaging actions by individuals which may be committed either knowingly or unknowingly. EFC's intentions for publishing a Computer Acceptable Use Policy are toward this end; they are not to impose restrictions that are contrary to EFC's established culture of openness, trust and integrity.

Internet, Intranet, and Extranet-related systems, including but not limited to computer equipment, software operating systems, storage media, e-mail accounts providing electronic mail, World Wide Web browsing, and File Transfer Protocol are the property of EFC. These systems are to be used for business purposes in serving the interests and mission of the company and of our parents, students and staff in the course of normal business operations.

Effective security requires a team effort involving the participation and support of every EFC employee who handles information and/or information systems. It is the responsibility of every computer user to know these guidelines, and to conduct their activities in conformance with the policy.

## 2.0 Purpose

The purpose of this policy is to outline the acceptable use of computer equipment at EFC. These rules are in place to protect the employee and EFC. Inappropriate use exposes EFC to risks including virus attacks, compromise of network systems and services, and legal issues.

## 3.0 Scope

This policy applies to employees, students, contractors, consultants, temporary employees, and other workers at EFC, including all personnel affiliated with third parties. This policy applies to all equipment that is owned or leased by EFC including but not limited to, laptop computers; desktop computers; networked and non-networked peripherals such as printers, scanners and fax machines; imaging devices such as still and video cameras; and the voice over Internet protocol (VOIP) telephone system.

Education for Change
Corporate Office:
303 Hegenberger Rd. Ste. 301
Oakland, Ca 94621

# EFC Equipment Accountability Sign-out Form

## 4.0 Policy

General Use and Ownership

a. While the EFC network administration intends to provide a reasonable level of privacy, users should be aware that the data they create on company systems remains the property of EFC. Because of the need to protect EFC's network, management cannot guarantee the confidentiality of information stored on any network device belonging to EFC.

b. Employees are responsible for exercising good judgment regarding the reasonableness of personal use. Brief and occasional personal use of the electronic mail system or the Internet is acceptable as long as it is not excessive or inappropriate, occurs during personal time (lunch or other breaks), and does not result in expense to EFC. Regarding the content in *any* electronic communication, a good rule of thumb to follow is: *there is NO expectation of privacy.*

c. Use is defined as "excessive" if it interferes with normal job functions, responsiveness, or the ability to perform daily job activities. Electronic communication should not be used to solicit or sell products or services; to distract, intimidate, or harass coworkers or third parties; or to disrupt the workplace.

d. Use of EFC computers, networks and Internet access is a privilege granted by EFC administration and may be revoked at any time for inappropriate conduct carried out on such systems, including, but not limited to:

- Sending chain letters or participating in any way in the creation or transmission of unsolicited commercial e-mail ("spam") that is unrelated to legitimate educational or business activity;
- Engaging in private or personal business activities, including excessive use of e-mail, instant messaging and chat rooms;
- Misrepresenting oneself or EFC;
- Violating the laws and regulations of the United States or of any other nation or state, city, province, or other local jurisdiction in any way;
- Engaging in unlawful or malicious activities;

- Deliberately propagating any virus, worm, Trojan horse, trap-door program code, or other code or file designed to disrupt, disable,

Education for Change
Corporate Office:
303 Hegenberger Rd. Ste. 301
Oakland, Ca 94621



impair, or otherwise harm either EFC's networks or systems or those of any other individual or entity outside of the EFC network;

- Using EFC computing resources in any way that is disruptive, offensive to others, or harmful to morale (e.g. sexually explicit images, ethnic slurs, racial epithets, or anything else that may be construed as harassment or disparagement of others based on their race, national origin, sex, sexual orientation, age, religious beliefs or political beliefs may not be displayed or transmitted);
- Attempting to gain access to another employee's personal file of e-mail or voicemail messages without the latter's express permission;
- Sending, receiving, or accessing pornographic materials;
- Distributing politically partisan material or religious material;
- Causing congestion, disruption, disablement, alteration, or impairment of EFC networks or systems;
- Maintaining, organizing, or participating in non-work-related Web logs ("blogs"), Web journals, "chat rooms," or private/personal instant messaging;
- Failing to log off any secure, controlled-access computer or other form of electronic data system to which the employee is assigned, if the employee leaves such computer or system unattended;
- Using recreational games; and/or
- Defeating or attempting to defeat security restrictions on EFC systems and applications.

e. Using EFC's electronic communication systems to access, create, view, transmit, or receive racist, sexist, threatening, or otherwise objectionable or illegal material is strictly prohibited. "Material" is defined as any visual, textual, or auditory entity. Such material violates EFC's anti-harassment policies and is subject to disciplinary action. Use of EFC resources for illegal activity can lead to disciplinary action, up to and including dismissal and criminal prosecution. EFC will comply with reasonable requests from law enforcement and regulatory agencies for logs, diaries, archives, or files on individual Internet activities, e-mail use, and/or computer use.

Education for Change
Corporate Office:
303 Hegenberger Rd. Ste. 301
Oakland, Ca 94621

# EFC Equipment Accountability Sign-out Form

f. Unless specifically granted in this policy, any non-business use of EFC's electronic data systems is expressly forbidden.

g. Any employee found to violate this policy, could be subject to disciplinary action, up to and including dismissal.

## Ownership and Access of Electronic Mail, Internet Access, and Computer Files

EFC owns the rights to all data and files in any computer, network, or other information system used in the organization. EFC also reserves the right to monitor electronic mail messages (including personal/private/instant messaging systems) and their content, as well as any and all use of the Internet and of computer equipment used to create, view, or access email and Internet content. Employees must be aware that the electronic mail messages sent and received using EFC's equipment are not private and are subject to viewing, downloading, inspection, release and archiving by EFC officials at all times. EFC has the right to inspect any and all files stored in private areas of the network or on individual computers or storage media in order to assure compliance with policy and with state and federal laws. No employee may access another employee's computer, computer files, or electronic mail messages without prior authorization from either the employee or an appropriate EFC official. EFC has licensed the use of certain commercial software application programs for business purposes. Third parties retain the ownership and distribution rights to such software. No employee may create, use, or distribute copies of such software that are not in compliance with the license agreements for the software. Violation of this policy can lead to disciplinary action, up to and including dismissal.

## Access to Inappropriate Material

To the extent practical, technology protection measures (or "Internet filters") shall be used to block or filter Internet, or other forms of electronic communication, access to inappropriate information by EFC students.

Specifically, as required by the Children's Internet Protection Act, blocking shall be applied to visual depictions of material deemed obscene or child pornography, or to any material deemed harmful to minors.

Subject to staff supervision, technology protection measures may be disabled or, in the case of minors, minimized only for bona fide research or other lawful purposes.

Education for Change
Corporate Office:
303 Hegenberger Rd. Ste. 301
Oakland, Ca 94621

# EFC Equipment Accountability Sign-out Form

## Personal Electronic Equipment

Employees may not bring personal computers to the workplace or connect them to EFC's electronic systems unless expressly permitted to do so by the Finance and Operations department. Any employee bringing a personal computing device onto EFC premises thereby gives permission to the Finance and Operations department to inspect the personal computer at any time with personnel from EFC's technical staff and to analyze any files, or other data, or data storage media that may be within or connectable to the personal computer or image recording device in question. Employees who do not wish such inspections to be done on their personal computers or imaging devices should not bring such items to work at all.

## Personal Software

The use and installation of personal software on EFC's computer systems is forbidden. All software required to perform job functions and installed on EFC computer systems, must be licensed to EFC. Requests for additional software must be directed to the Finance and Operations department.

Violation of this policy, or failure to permit an inspection of any device covered by this policy, shall result in disciplinary action, up to and possibly including immediate termination of employment. In addition, the employee may face both civil and criminal liability from EFC or from individuals whose rights are harmed by the violation.

I have read and understand the above information.

Printed Name:_____

Signature:_____

Date:_____/_____/_____

Education for Change
Corporate Office:
303 Hegenberger Rd. Ste. 301
Oakland, Ca 94621

# EFC Equipment Accountability Sign-out Form

This form assigns primary responsibility for EFC equipment to the borrower. The borrower will be responsible for taking the necessary precautions to protect the equipment and to store it in a manner that provides adequate protection when it is not in use, thus not subjecting the equipment to possible theft or damage. *If it is determined that loss or damage is a result of negligence, the borrower may be held financially responsible for the repair or replacement of the equipment.*

EFC Inventory # or Asset Tag # if applicable: _____

Date Signed Out: _____/_____/_____ Due Date: _____/_____/_____

Borrower's Initials_____

Date Returned: _____/_____/_____

Accepted by (please print):_____Signature:_____

Borrower's Name: _____

Phone Extension: _____ Mobile Phone Number:_____

Description of Equipment: _____

Primary Location of Equipment While Signed Out: _____

Education for Change
Corporate Office:
303 Hegenberger Rd. Ste. 301
Oakland, Ca 94621

# EFC Equipment Accountability Sign-out Form

## Terms and Conditions of Loan

1. The borrower will be responsible for return of the equipment in like condition as received.

2. If loss or damage of the equipment/property occurs and determination is made that the loss or damage is a result of negligence, the borrower may be held financially responsible for the repair or replacement of the item(s). Reimbursement to EFC by the borrower who checked the equipment out should be at the fair market value of the equipment/property at the time of loss.

3. Equipment cannot be loaned or transferred to a third party.

4. The borrower cannot modify the equipment in any way without written approval of EFC.

5. The borrower will make the equipment available at any time as requested by EFC.

Signed and agreed,

Borrower: _____ Date:____/____/____

Acknowledged,

Manager: _____ Date:____/____/____

Education for Change
Corporate Office:
303 Hegenberger Rd. Ste. 301
Oakland, Ca 94621

# EFC Password Policy

## Purpose:

This policy establishes conditions and requirements for appropriate security for use of all EFC computers. These requirements are necessary to help ensure personal security and to protect the privacy of all electronic interactions throughout EFC campuses and the Home Office.

## Description:

Each EFC computer user will be issued a User ID and password combination by the Finance and Operations department. This User ID and password combination will serve as the employee's primary digital identity. This User ID and password provides access to the user's local machine; to network resources such as printers; and to Internet services such as the World Wide Web (the "Internet"), e-mail and the PowerSchool server.

## Scope:

This policy applies to every person using an EFC access account at any time or in any location.

## System Requirements:

- EFC requires passwords to be used as assigned *without change.* A confidential record of the password will be maintained by the Finance and Operations department in case the user forgets or loses the password.
- EFC passwords are created to have a high security rating. (Refer to http://www.pctools.com/guides/password/ for principles used to create EFC passwords.)
- EFC management may require a password change at its discretion.
- Passwords unknown to EFC may not be used.

## Individual Responsibilities:

EFC User Account owners are expected to:

- Comply with the EFC Computer Acceptable Use Policy.
- Use only the User ID and password provided by the Finance and Operations department.
- Safeguard the password. For example, individuals should not write down or store the password on paper or on a computer system where others might acquire it.
- Never share the password, even with someone outside the EFC community.

Education for Change
Corporate Office:
303 Hegenberger Rd. Ste. 301
Oakland, Ca 94621

# EFC Password Policy

- Reserve the EFC User ID and password for EFC systems and services only. Individuals should create a different User ID and password for external services such as stores, banks, music services, Web sites, personally owned computers, or other systems.

All use of the EFC User Account is assumed to be performed by the person assigned to that account. Account owners will be held responsible for all activities associated with their accounts.

Failure to conform to these requirements may lead to suspension of account privileges or other action as provided by EFC policy or law.

**Password Expiration:**

User passwords will be changed only by Finance and Operations department personnel.

**Support:**

Individuals who forget their password or need assistance should contact the Finance and Operations department.

**Exceptions:**

Exceptions to this policy must be applied for in writing and will be authorized only by the Finance and Operations department.

**Distribution:**

This policy is available in the Employment Handbook or from the Finance and Operations department.

**Change:**

EFC may change this policy at any time subject to the review of the Finance and Operations department or EFC management.

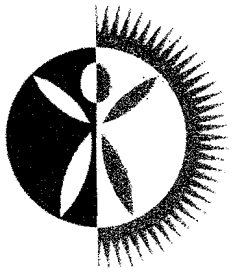
# Cox Academy

an Education *for* Change Public School

# Parent-Student Handbook 2009-2010

Enikia Mortiel, Principal/Directora

Julia Newlin, Assistant Principal/Sub-Directora



Education *for* Change

2009-2010 Academic Year

Dear Parent/Guardian,

Thank you for taking the time to read the Cox Academy at Education for Change Parent-Student Handbook. This handbook was designed to aid you and your child. It is not all-inclusive, but does cover most of the items that commonly concern parents and students.

The staff of Cox Academy continues to encourage your active involvement in your child's education. A strong partnership between home and school can greatly benefit your child as he/she grows and matures. To this end, we ask that you read carefully through this handbook with your child(ren) and discuss its contents.

We know that your experience at Cox will be positive and pleasant with high expectations for academic and social success. Please save your handbook for reference throughout the school year. As always we are here to assist you and your child. Please feel free to contact us at **(510) 904-6300.**

Sincerely,

Enikia Ford Morthel, Principal

and the staff of Cox Academy

## About Education for Change

Founded in 2005 by experienced educators and entrepreneurs, Education for Change (EFC) is a non-profit public benefit corporation. As a charter School Management Organization, EfC operates public elementary schools designed to offer a high quality education at no cost to parents. EFC serves ethnically and economically diverse student bodies. EFC currently operates three schools in Oakland: Cox Academy, World Academy, and Achieve Academy.

## Mission Statement

The mission of Education for Change is to provide a superior public education to Oakland's most underserved children by creating a system of public schools that relentlessly focuses on the continuous refinement of high quality instruction.

## Vision Statement

When we succeed in building a high performing system of public schools serving the most underserved students, we will make the changes necessary for success to be replicated across every urban public school.

## Office Hours

The school is open from 8:00 to 4:00 on all school days.

## Attendance

### General Attendance Information

School hours are from 8:30 to 3:00 ($1^{st}$-$5^{th}$) and Kindergarten goes from 8:30-2:00. Wednesdays are minimum days and all students are dismissed at 1:30. Prior to 7:45 and after dismissal, we have no assigned supervisory duty and cannot be held responsible for your child.

**Breakfast*: Breakfast is served in the cafeteria between 7:45 and 8:25. **If arriving earlier for breakfast, students may wait in the cafeteria after eating.** Please do not bring or send your child/ren prior to the time they can be supervised by the staff on duty.

Education for Change uses an attendance system called Power School which supports our school in monitoring student attendance. **Parent/guardians must send a note and/or telephone the school to clear all excusable absences within 72 hours.** Failure to excuse the absence results in a recorded truancy on your child's record. Power School automatically mails truancy notification letters to the parent/guardians of the students who accumulate 3 or more days of unexcused absences. School or Home Office staff may request your attendance at a conference when your child has unexcused absences. Please also be aware that students may be withdrawn from classes

and placed on inactive status if 10 days of absence occur and the parents have failed to contact school staff. (*Please see Official EFC Illness Policy included in the Handbook.)*

## Tardiness

Students shall arrive at school and be in the classroom at the properly scheduled time (8:30am). Habitual tardiness, according to California law, is truancy and will be treated as such.

## Truancy

Students shall abide by the attendance laws of the State of California.

## Early Dismissal of Students

Students leaving before the end of the school day are dismissed through the school office. They are not allowed to wait in front of the building or to enter cars unless accompanied by a parent. These rules are necessary to ensure student safety. <u>You must come to the office to sign your child out.</u>

You must send a note each time there will be a change in your child's dismissal time or procedure. We will ask to see identification of any person we do not know and will not release a child to a baby-sitter, stepparent or friend without prior authorization. We will follow the child's normal routine without a note from the parent.

## Excused Absences

The following conditions *<u>may</u>* excuse a student from school attendance:

- ✓ Personal illness or injury (A Medical Verification note may be required by the school attendance clerk or school principal.)
- ✓ Family illness, an extreme emergency situation requiring the student to be absent from school
- ✓ Quarantine of the home by local health officials
- ✓ Death of a relative (limited to three days, unless reasonable cause can be shown for a longer absence)
- ✓ Observance of a religious holiday, consistent with student's established beliefs or creed

# Education for Change Illness Policy

Attendance at school is closely related to achievement and success in school. As a parent or guardian, you are obligated to send your child to school.

Any student who has more than three unexcused absences is truant. Habitually truant students will be referred for a School Attendance Review Team at the school where a contract to improve attendance will be developed. If absences continue to occur, the school will refer the parents to a School Attendance Review Board at the District Home Office where a plan will be developed. If that plan is not completed, the parents may be referred to the Alameda County District Attorney.

The state law states that absences are only **excused** if the child is ill or there is a death in the family (1-3 day limit). All other absences are **unexcused**. Any tardy over 30 minutes, except for medical reasons, is also unexcused. If your child had 3 unexcused absences and/or tardies, s/he will be considered truant.

"Going out of town" with your child during school is an **unexcused** absence and also "family emergencies". In extreme emergencies, on a limited basis, you may request permission for approval of **Independent Study** from the school principal.

It is the EFC (Education for Change) policy that we may require a doctor's note for three consecutive days of absence. If we feel that your child is excessively absent (over 10%), we can require a doctor's note for every absence.

Our teachers work very hard to insure that your child receives the best education possible. This can only be done if your child is in school, on time, every day when s/he is healthy. Your child deserves an outstanding education.

PLEASE REMEMBER THAT FOR US TO DO OUR JOBS YOUR CHILD MUST ATTEND SCHOOL REGULARLY. A GOOD SOLID FOUNDATION IS CRITICAL TO YOUR CHILD'S FUTURE ACADEMIC SUCCESS

# EMERGENCY AND MEDICAL INFORMATION

## Emergency Medical Authorization Form

**Parents are required by state law to fill out an Emergency Medical Authorization Form.** These are kept on file in the office and used in emergency situations. This form will be sent home with your child **the first day of school. It is very important that you fill it out and return it the next day.** If your child is injured at school and we cannot reach you, we will use the information on this form.

It is your responsibility to inform the school of any changes in residency, custody, home/work phone numbers and emergency contact information.

## Medical Concerns - Allergies

It is imperative that all school personnel know of any type of allergy your child has, such as to bee stings or foods. This information should be provided to the school office manager *as well as* your child's teacher, who will see to it that the appropriate personnel are notified.

## Illness / Injury at School

*It is important that students are not sent to school with a fever, diarrhea, or if they are vomiting.* It is advisable to keep a child home until they are ***fever free for twenty-four hours without benefit of a fever-reducing medication.***

If you and the other people on your emergency contact list are to be away from the phone and therefore unable to be reached, please designate a person we can call temporarily in the event of an illness or accident.

# COMMUNICATION

## Home-School Communication/School Publications

You will receive many pieces of information from our school. Notes from teachers or the office may be sent home on any given day. Any encouragement you can give to your child about being responsible in bringing home school information would be appreciated since this is the only way we have to communicate with you. Please also check your child's backpack nightly for any important information.

## Contacting teachers

Please do not phone teachers at home unless the teacher gives you permission to do so. If you call the office, we will relay the messages. Teachers will not be interrupted during instruction time. **The Cox Academy office number is (510) 904-6300.**

Written notes and emails are another media via which to communicate with your child's teacher throughout the year. Ask your child's teacher about this option for communication.

## Use of Telephones

*The school telephones are not for student use.* Calling home for permission to visit with friends or to ask for forgotten lunch money, homework or books, or to ask someone to pick them up because they do not want to walk home is not permitted. In an ***emergency*** situation, ***or when there is an acceptable reason,*** students may use the phone with a written pass from the teacher.

Students WILL NOT be called out of class to speak to someone on the phone. Classes are not interrupted unless it is an extreme emergency. Messages will be taken and given to students at the appropriate time.

Please make sure that you discuss a rainy day procedure with your child/ren. All students are dismissed as usual on rainy days. Students waiting to be picked up are to wait in the lobby of the main building.

**Personal cellular phones, pagers, walkie-talkies, and/or any cellular communication device must be off during school hours. If these items are found in use during the school day, they will be confiscated (for pick up by guardian at the day's end). Please communicate with your student using the school lines only. Do not call or accept cellular calls from your student during the school day.**

## Standards Based Report Cards

Cox Academy is using the standard based report card that is aligned with the California State Standards. For each academic section (Reading Language Arts, Math, Cross Curricular Integration), students are scored on a 1-5 scale which mirrors the CST scores. ELD also uses the 1-5 scale, but the scores mirror the CELDT scores. The guidelines for Language Arts and Math indicate the Proficient Level. Proficient is considered at grade level. To receive a Proficient (4), the expectation would be that the student would have mastered all the standards indicated in the guidelines for that marking term. Each component or standard in Language Arts and Math, should receive one of the following marks for their Grade Level Performance:

| Academic Grades | ELD Grades |
|---|---|
| 1 = Far Below Basic | 1 = Beginning |
| 2 = Below Basic | 2 = Early Intermediate |
| 3 = Basic | 3 = Intermediate |
| 4 = Proficient | 4 = Early Advanced |
| 5= Advanced | 5= Advanced |

Students will receive a report card 3 times a year (see school calendars for the end of the trimester dates). At the end of the first and second trimester teachers will arrange a conference to discuss the report card.

### Valuable Property

Valuable property such as radios, CD and tape players, pagers, expensive jewelry, electronic games, iPods, etc. may not be brought to school by students. The school will NOT accept responsibility for the loss of personal property. No scooters, skateboards or "heelies" are allowed on campus.

### School Visitation

We welcome visitors to our school. You must enter through the front door, and sign the visitor log in the office. You are also required to wear visitor identification.

If you should wish to visit your child during lunchtime, please follow the following procedure: come to the main office, sign in using the visitor's log, and fill out and wear a badge with your name and your child's name written on it. As parents are not to enter the cafeteria during lunch, ask a lunch supervisor to assist in finding your child. Parents may sit with *your child only* at a designated outside area. Please be aware that this procedure is in place for the safety of every child at our school.

Cox Academy offers a number of classes and workshops for our parents and community members. When attending these classes/worskshops, please sign in/out and wear that appropriate identification badge for that program. Badges need to be returned at the end of the class.

## CURRICULAR AND ENRICHMENT PROGRAMS

### Class Assignments

Students are assigned to classes with input from the classroom teachers from the previous year. They are grouped to provide balanced classes for everyone's benefit. After the classes are formed, the Principal assigns teachers to each list of classes. This is the most educationally sound way to group students; therefore, parent requests for teachers cannot always be honored.

### Curriculum

The adopted curricula for EFC are Open Court Reading and Saxon Math. Each grade level teaches grade level standards. Teachers will discuss these curricula and standards in greater depth at Back to School Night.

### Homework

The EFC policy for homework varies by grade level as follows:

**Kinder**: 20-35 minutes nightly

**1st Grade**: 35-50 minutes nightly

**2nd & 3rd Grades**: 45-60 minutes nightly

**4th and 5th grades**: 85-90 minutes nightly

This is a guideline and may vary by a few minutes from day to day. For a more detailed description of homework, please contact your child's teacher.

### After School Enrichment and Intervention

This year, Cox students will have the opportunity to participate in after-school enrichment and intervention classes. Classes will be offered in 10-week sessions, after school in two hour blocks.

## PARENT/COMMUNITY INVOLVEMENT

### Volunteers

Volunteer help and support makes all the difference in broadening the spectrum of activities each year. Parents, grandparents, and friends are involved in many ways at Cox Academy. They help in various capacities throughout the school. They also chaperone study trips and help students with special activities. Please contact the classroom teacher or the office if you would like to support the school program by volunteering, and we will assist you in completing the necessary paper work. Please be aware that there are requirements for fingerprinting and TB clearance for school volunteers.

### Parent Committees

**Parent Leadership Council (PLC):** Cox Academy is always searching for more efficient and effective venues for parents and teachers to collaborate and work together to meet the needs of the students. Parent Leadership Council meetings are a very important way for parents to provide input about how we can continuously improve the school and to stay current about what is happening at our school. As we dialogue about the nature and name of this group, we invite you to join us for meetings as they are announced. (Look for meeting dates and times in each month's newsletter, school calendar and reminder memos).

**EFC Scholars:** This year, Education for Change is beginning a program called EFC Scholars. This program will require parents and students to formally agree to set list of academic and behavioral expectations. We encourage all students and families to become a part of the EFC Scholars.

### STUDY TOURS

Study Tours are an important extension of our school curriculum. In order for your child to benefit from these activities, appropriate behavior from all students is necessary. Cox Academy reserves the right to prohibit students from attending study tours because of behavior that could create unsafe conditions for him/herself or others. It is critical that all students consistently exhibit the ability to follow rules and respond appropriate to adults without delay.

Parent permission slips will be sent home in advance and must be signed and returned at least a day prior to the trip. Modes of transportation may be walking, charter bus, or public transportation.

Chaperones are an essential element for study tours to take place. Without chaperones and/or drivers our students may not be able to partake in these enrichment opportunities. We encourage parents to find ways to support the classroom teacher in making [at least one] study tours possible each school year. Parents who chaperone MUST leave other children at home. This is in adherence to EFC Administration Regulations.

# POSITIVE BEHAVIOR LEADS TO SUCCESS

## The Six Ps of EFC:

*Be Prompt. Be Polite. Be Proud. Be Productive. Be Prepared. Be Positive.*

At EFC we believe in the six 'P's of a quality education experience: be prompt, be polite, be proud, be productive, be prepared, and be positive. As a staff, we regularly discuss these characteristics with the students and reward positive behavior that represents the six 'P's.

## Code of Conduct

The goal of the Code of Conduct is to create conditions that foster student self-discipline in a warm, supportive school climate that is conducive to maximum learning for all students. The Code of Conduct is a general guide for behavior, not a mechanism for rigid control. The individual personalities of students or extenuating circumstances will be considered before corrective measures are prescribed. (*Reference Ed Code Sections 48900 and 48915 and Health and Safety Code 11007*)

1. SERIOUS MISCONDUCT CODE:

A violation of any rule may result in disciplinary actions, including Saturday School, In-School Suspension, Out-of-School Suspension, expulsion, compensatory payment of damages, assigned work, loss of credit for assigned work or tests, or loss of privileges:

1. **Disruption of school:** A student shall not, by the use of violence, force, coercion, threat or any other means, cause disruption or obstruction of the normal operation of school.
2. **Damage of school property, including buses and bus seats:** A student shall not cause or attempt to cause damage to property of EFC Schools.
3. **Damage of private property:** A student shall not damage private property, on or off school premises, during a school activity, function or school event.

4. **Assault:** A student shall not behave in a way that could cause physical injury to other students, any school employee or other persons in the school building or on school property. This rule also applies during school-related activities held off school premises.
5. **Dangerous Weapons and Instruments:** Students shall not possess, handle, transmit or conceal any dangerous weapon or instrument on school property, in a school vehicle or at any school-sponsored activity.
6. **Threats:** Students shall not through verbal, written, technological or any other means make statements threatening that physical or emotional harm may come to another person or to an institution. Bomb threats will result in expulsion from school.
7. **Harassment:** Students shall not harass other students, school employees, persons who are guests of the school or persons conducting business for the school. This category also applies to remarks or actions of a sexual, racial, ethnic or religious nature that are deemed offensive.
8. **Narcotics, alcoholic beverages, drugs, look-alike drugs or drug paraphernalia:** A student shall not use, possess, transmit, conceal or be under the influence of the aforementioned items while in the school building, on school property or involved in any school activities held off the school premises.
9. **Insubordination:** A student shall not repeatedly fail to comply with the directions of teachers, student teachers, secretaries, substitute teachers, teacher aides, bus drivers, the principal or other school personnel.
10. **Theft:** Students shall respect the personal ownership rights of others. In addition to taking any of the disciplinary actions listed on the previous page, the principal may exercise his/her prerogative of reporting thefts to local law enforcement agencies.
11. **Tobacco:** Tobacco in any form shall not be in the possession of students or used in the building, on school property, while being transported in school vehicles or at any school function.
12. **Possession of vulgar materials:** A student shall not possess vulgar materials (i.e. pornographic pictures, etc.) Seems vague?
13. **Repeated Violation of School Rules:** A student shall not repeatedly fail to comply with any school rules.

## 2. MINOR MISCONDUCT CODE

A violation of any rule may result in disciplinary actions, including suspension, detention, loss of privileges, isolation, written notice to, or conference with, parents, assigned work or loss of bus privileges. Student shall be given due process before a disciplinary action is taken.

1. **Use of profanity:** A student shall not use profanity of any kind

2. **General misconduct:** Students shall refrain from running in the halls, throwing objects, purposely cluttering a restroom or other area, writing on furniture or in inappropriate places or being excessively loud in their talk or abusive in their behavior.
3. **Inappropriate display of affection:** Students shall refrain from displays of affection, (i.e., kissing, embracing, etc.) while on school premises or any other school property, during school activities at or away from school.
4. **Chewing Gum:** Students will not be permitted to chew gum. Teachers will enforce disciplinary action for chewing gum in school.
5. **Violation of playground rules**
6. **Violation of cafeteria rules:** Students shall not throw food or any object, leave their eating space in a dirty condition, talk too loudly, use food in an inappropriate manner or refuse to comply with instructions by any school employee.
7. **Violation of Dress Code:** Students shall not dress in such a way as to cause a disruption of the normal operation of the school or affect the health or safety of students. (See Dress Code Policy.)
8. **Other violations that are not covered in the above items**

## Cox Academy's Dress Code Policy

Students and parents need to be aware of the importance of good grooming and its effect upon the learning environment. Additionally, it is crucial that we have the support of the parents in upholding our school uniform policy. It is the responsibility of the parents to see that grooming reflects the modesty and good taste expected in school.

Cox Academy students wear uniforms. The uniforms are yet another way to ensure our students' safety and build school community. Unifom colors are white and khaki. The uniform is a white collared (polo) shirt and khaki pants/shorts/skirt or jumper.

Boys may wear khaki pants or shorts along with a white collared (polo) shirt. Girls may wear khaki pants, skirts, skorts, jumpers, or shorts along with a white collar blouse/top. Students may wear a Cox Academy t-shirt as well along with khaki bottoms.

Appropriate attire does not disrupt the normal operation of school. The following dress and grooming guide and restrictions are to be followed by all students.

**Restrictions are as follows:**

- No gang related clothing or headgear is allowed under any circumstances.
- No backless shoes or sandals, thongs, or slick-soled dress shoes are allowed. Shoes must cover the foot for protection.

- No halter tops, strapless tops, midriff shirts or blouses, see through tops, spaghetti straps, sleeveless undershirts or muscle shirts allowed. (Tank tops may be worn with a sleeved outer garment, such as a blouse or shirt.)
- No hats or caps may be worn at school.
- No hip-huggers or overly baggy pants falling below the waist
- No shorts or skirts shorter than the length of the finger extended straight down one's side (the finger tip rule)
- No shirts with obscene pictures, wording or advertisements of drugs, alcohol, or cigarettes
- No make up.
- No sagging of pants.

## Procedure to Resolve Parent / Teacher Disagreements

Complaints about school personnel will be investigated fully and fairly. Anonymous complaints will be disregarded.

The goal of this section is:

- To establish a simple framework for addressing concerns
- To provide for prompt resolution of concerns
- To expect that all parties will participate in a cooperative manner to resolve concerns
- To expect that most concerns will be handled without resorting to this procedure beyond Step 1
- To assure that the system has a procedure to receive citizens' concerns in an orderly fashion to achieve the best possible educational program for students

### Step No.1 - Direct Conversation

If a parent or community member has a disagreement or misunderstanding with a staff member, the complainant should address the concern to the specific staff member directly involved with the circumstances surrounding the concern. The staff member will meet with them as soon as possible (subject to mutual agreement by key parties).

### Step No. 2 - Fact and Possible Resolution

If the complainant or the staff member is not satisfied with the outcome of Step No. 1, or the complainant or the staff member is unwilling to meet independent of an administrator, a meeting with the staff member and appropriate administrator will be arranged as soon as possible at a mutually convenient time. This step is to be informal and verbal.

No further action will be taken beyond Step No. 2, unless the complainant submits in writing a signed and dated statement of facts giving rise to this concern, the name of the staff member and the remedy sought.

## UNIFORM COMPLAINT PROCEDURE POLICY

The Education for Change (EFC) Governing Board recognizes that the Charter Management Organization (CMO) is responsible for ensuring that it complies with state and federal laws and regulations governing educational programs.

The CMO shall follow uniform complaint procedures when addressing complaints alleging unlawful discrimination based upon age, ancestry and/or national origin, color, physical or mental disability, race, ethnic group identification, religion, veteran status, sex, gender, marital status, medical condition (cancer related) and/or sexual orientation, in any program or activity that receives or benefits from State and/or Federal financial assistance.

The CMO shall also follow uniform complaint procedures when addressing complaints alleging failure to comply with state or federal law in:

1. Consolidated Categorical Aid Programs
    - School Based Coordinated Programs
    - School Improvement Program
    - Title I Programs - No Child Left Behind Act
    - Program for English Learners
    - Educational Equity
    - Gifted and Talented Education (GATE)
    - State Compensatory Education (SCE)
    - Safe and Drug Free Schools & Tobacco Use and Prevention Education (TUPE)
2. Child Nutrition Programs
3. Special Education Programs.
   (Title 5, Section 4621 and 4610)

Upon receipt of a written complaint from an individual, public agency or organization, the uniform complaint procedures shall be initiated. The CEO of EFC or designee shall distribute full information about these procedures.

## Removal from the Classroom

A student may be removed from the classroom and sent to the "Buddy" teacher when that student's behavior interferes with classroom instruction. In this case, the parent will be contacted by the teacher regarding the child's behavior. The principal will contact the parent if the inappropriate behavior continues. In case of suspension, the parent will be asked to pick up the child. If the behavior persists, a family member or adult will be asked to accompany the child to school.

## Cafeteria

Breakfast and lunch are provided in our cafeteria. Pricing and Free/Reduced Reduced applications and information are available at the front office (and are included in enrollment packets).

No parents are allowed in the cafeteria during lunchtime. Parents who come to eat with their child or deliver food are required to check in at the office and get a visitor's pass. Parents who choose to eat with their child must sit outside the cafeteria in a designated area.

### Teacher Collaboration and Professional Development

Just as we foster a love of learning in our students, the Cox staff is a staff of professional educators dedicated to lifelong learning. We continue to set aside weekly time to reflect on and improve our practice for our own professional development. Several times a week teachers are involved in grade-level meetings and/or trainings to help us improve our ability to consisntely meet all students' needs. During these times teachers are required to be in attendance and are unable to meet with you.

### Staff Development Days

During staff development days, school is not in session. Refer to the school calendar for the dates of staff development days. You will be notified in advance of these dates so that you can make appropriate arrangements for your child(ren).

## SAFETY

### Emergency Procedures

Cox practices fire drills and disaster drills on a regular basis. Teachers are prepared if anything occurs on campus. If there is an emergency situation, the Cox staff will stay on site until all students have been picked up. Students will only be released to those people who are on the emergency card and no one else. All students must be signed out in any extreme emergency situation. Remember to update emergency cards as the information changes.

### Safety Drills

There will be monthly fire and earthquake drills to familiarize students with proper safety procedures. We hope we will never have to use these procedures, but we want students to be comfortable with them in case of an emergency. Review with your children your safety procedure at home.

### Campus Security

All perimeter gates are closed 10 minutes after school begins and after school ends. The main entrance on Sunnyside should be used during school hours.

## Internet User Policy for Students

Education for Change provides students and staff (users) with access to the Internet as a learning tool. This electronic communications network gives users an opportunity to explore a diverse and unique pool of information.

Utilizing this network in a school setting allows users of all ages to research information related to their classes participate in innovative educational projects and develop personal skills needed to communicate with others in the global community.

The students and staff utilize the Internet as an instructional tool in grades K-5. The following list highlights examples of the Internet usage in our schools:

- Searching for information to support research projects for classes
- Collecting and analyzing information
- Participating in enrichment activities
- Researching current events and developments

The staff guides and supports students in developing skills and behaviors needed to properly use the Internet. In addition to staff supervision, the school network is equipped with software directed at preventing students from accessing illegal, defamatory, or potentially offensive resources.

However, the content of the Internet changes on a daily basis and, even with these safeguards, by chance or determination a user may be exposed to inaccurate or inappropriate information.

Students, parents/guardians, staff and administrators must form a partnership to promote responsible educational use of the Internet. Federal and State laws as well as Education of Change policies outline the responsibility and govern the appropriate use of the Internet and the school network. Education for Change staff will teach and clarify appropriate use standards to students.

If a student violates acceptable use of the Internet by engaging in any of the following actions, he or she will face the consequences as outlined in the Code of Conduct.

- Sending or receiving offensive language or graphics
- Violating copyright laws
- Utilizing another user's password
- Attempting to harm or destroy the equipment or data of any user
- Posting defamatory or slanderous statements
- Engaging in unauthorized access of data or transfer of files
- Using Internet access for non-educational purposes.

Internet access is an important privilege to aid in the educational process and to help prepare our students for their role in the 21st century. It is our intention to provide this access for our students.

# EFC School Rules

Each student has a right to learn.
Each teacher has a right to teach.

*Therefore, all EFC students agree to EFC's 6 Principles of Good Conduct*

1. Be Prompt (in the right place at the right time).
2. Be Polite (demonstrate respect for self, others and our environment).
3. Be Prepared (come prepared to work hard, learn and help others learn).
4. Be Proud (come dressed in the EFC uniform and support your school)
5. Be Productive (make sure you keep up with your work and help your school).
6. Be Positive (always have a good attitude).

# Consequences

*The choice is yours*

| Positive | Negative |
|---|---|
| If you choose to follow the rules, the following will happen:<br><br>❖ Classroom recognition activities<br>❖ Awards assembly<br>❖ Participation in School sponsored activities<br>❖ Excellent education | If you choose to violate the rules the following will happen:<br><br>❖ Parent notification<br>❖ Loss of privileges<br>❖ Detention<br>❖ Suspension<br>❖ Expulsion |

Education for Success

# STANDARDS-BASED REPORT CARD

| GENERAL INFORMATION |
|---|
| **Student Name:** |
| **Student ID:** |
| **Grade Level:** |
| **Teacher:** |
| **School:** |
| **Year:** |
| **Special Programs:** |

| ATTENDANCE | T1 | T2 | T3 |
|---|---|---|---|
| **Total Days in Trimester:** | | | |
| **Days Absent:** | | | |
| **Days Tardy:** | 2 | 2 | 2 |
| **Absences and Tardies have impacted achievement:** | | | |
| **School Entry Date:** 8/31/2009 | | | |

| ENGLISH LANGUAGE DEVELOPMENT* | | | |
|---|---|---|---|
| **CELDT Score** | **T1** | **T2** | **T3** |
| Listening: 3 | | | |
| Speaking: 3 | | | |
| Reading: 0 | | | |
| Writing: 0 | | | |
| Overall: 3 | | | |

| BENCHMARK ASSESSMENT | T1 | T2 | T3 |
|---|---|---|---|
| **Reading and Language Arts** | | | |
| Fluency | | | |
| Comprehension | | | |
| Vocabulary | | | |
| Spelling | | | |
| Checking Skills | | | |
| Writing | | | |
| **Mathematics** | | | |
| Number Sense | | | |
| Algebra and Functions | | | |
| Measurement and Geometry | | | |
| Statistics, Data Analysis and Probability | | | |
| Mathematical Reasoning and Problem Solving | | | |

| SOCIAL SKILLS AND WORK HABITS | T1 | T2 | T3 |
|---|---|---|---|
| **Social Skills** | | | |
| Follows classroom and school rules | | | |
| Student is Polite | | | |
| Student is Proud | | | |
| Student is Positive | | | |
| **Work Habits** | | | |
| Completes homework | | | |
| Listens attentively | | | |
| Follows directions | | | |
| Participates in class discussions | | | |
| Student is Productive | | | |
| Student is Prepared | | | |
| Student is Prompt | | | |

"+" is above benchmark/expectations
"x" is at benchmark/expectations
"-" is below benchmark/expectations

Grade Level Performace:
5=Advanced 4=Proficient 3=Basic
2=Below Basic 1=Far Below Basic

*ELD Performance: 5=Advanced
4=Early Advanced 3=Intermediate
2= Early Intermediate 1= Beginning

Education for Change

| READING AND LANGUAGE ARTS | T1 | T2 | T3 |
|---|---|---|---|
| Effort | | | |
| Progress | | | |
| **Reading and Language Arts** | | | |
| Decoding and Word Recognition | | | |
| Spelling/Dictation | | | |
| Vocabulary and Vocabulary Strategies | | | |
| Reading Comprehension: Skills and Strategies | | | |
| Literary Response and Analysis | | | |
| Research and Inquiry | | | |
| Writing Process and Writing Strategies | | | |
| Writing Applications/Genres and their Characteristics | | | |
| Narrative | | | |
| Descriptions with sensory details | | | |
| Personal and formal Letter | | | |
| Written and Oral Conventions | | | |
| Listening and Speaking Strategies | | | |
| Penmanship | | | |
| | | | |

| MATHEMATICS | T1 | T2 | T3 |
|---|---|---|---|
| Effort | | | |
| Progress | | | |
| **Math Components and Standards** | | | |
| Counting, reading, writing and understanding place value for whole numbers up to 1,000 using expanded notation | | | |
| Solving 2 and 3 digit addition and subtraction problems | | | |
| Solving simple multiplications and division problems | | | |
| Understanding fractions and decimals as parts of a whole | | | |
| Solving addition and subtraction problems with money | | | |
| Estimating and problem solving up to the thousands place | | | |
| Modeling and representing number relationships (algebraic, charts and graphs) with addition and | | | |
| Understanding measurement | | | |
| Identifying common shapes and their attributes | | | |
| Collecting data and representing it on graphs and charts | | | |
| Understanding extended patterns | | | |
| Mathematical reasoning: how to approach solving mathematical problems and being able to justify that reasoning | | | |

| CROSS-CURRICULAR INTEGRATION: Effort and Progress | | | |
|---|---|---|---|
| Effort | | | |
| Progress | | | |

"+" is above benchmark/expectations
"x" is at benchmark/expectations
"-" is below benchmark/expectations

Grade Level Performace:
5=Advanced 4=Proficient 3=Basic
2=Below Basic 1=Far Below Basic

| CROSS-CURRICULAR INTEGRATION: Performance | | | |
|---|---|---|---|
| Science | | | |
| Social Studies | | | |
| Art | | | |
| Physical Education | | | |
| Health | | | |

Education for Change

**Student Name:** Alcaraz, G[redacted]nni
**Teacher:** Callaghan, Colleen

# TEACHER COMMENTS

**FIRST TRIMESTER**

**Possible retention/Recommended for retention:**
**SST: Date:**
**Interventions:**

**Comments:**

**Conference Date:** _____ **Teacher Initials:** _____

**Parent Signature:** _____

EFC
Parent Leadership Council
Basic Mandated Topics

Purpose: To provide parents with regular opportunities to provide meaningful input into site plans to address reaching high levels of student achievement and operating safe, efficient schools.

Primary Areas of Focus:

Review of Student Achievement
Review Progress of English Language Learners
Review EFC and become knowledgeable about EFC's instructional program
Review of efforts to make all parents aware of the importance of school attendance
Review Attendance and Discipline Data
Provide input for development of site Safety Plan
Review LEA Plan
Review Language Census data
Review Assessment Schedules and Purposes
Review Parent Survey Results
Provide Input on Parent Involvement

| Date | Topics |
|---|---|
| October | Parent Survey Results<br>Student Achievement Results<br>Improvement Priorities for current school year |
| November | EFC Instructional Program (frequently done over multiple meetings)<br>Intervention Program |
| December | Attendance and Discipline Data |
| January | Advise on Safety Plan |
| February | LEA<br>Parent Survey Results |
| March | Redesignation Data<br>SES Report |
| April | Language Census<br>Assessment Schedule |
| May/June | Summer Training<br>Year in Review and Celebration |

# 3rd Grade Pacing Guide 2009 - 2010 — September

| Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
|---|---|---|---|---|---|---|
| Key:<br>Blue- Open Court<br>Red- Writing (see Writing Pacing Guide)<br>Green- Math | Aug. 31 First Day of School<br>Getting Started Day 1<br>Lesson 2 | 1<br>Getting Started Day 2<br>Lesson 3/4 | 2 Minimum Day<br>Getting Started Day 3<br>Lesson 5/6- M | 3<br>Getting Started Day 4<br>Lesson 7/8- D | 4<br>Getting Started Day 5<br>Lesson 9/10.1 | 5 |
| 6 | 7<br>Labor Day-<br>No School | 8<br>Unit Opener<br>Lesson 11- D, M<br>*Start Note Taking | 9 Minimum Day<br>Unit Opener<br>Lesson 12 | 10<br>U1L1D1<br>Getting Ideas D1<br>*27 F*<br>Lesson 13 | 11<br>U1L1D2<br>Getting Ideas D2<br>*27G*<br>Lesson 14/15.1 - D, M | 12 |
| 13 | 14<br>U1L1D3<br>Getting Ideas D3<br>*27H*<br>Lesson 15.2<br>*In Class Assessment | 15<br>U1L1D4<br>Getting Ideas D4<br>*27I*<br>Lesson 17<br>*Add date using digits to Math Mtg. | 16 Minimum Day<br>U1L1D5<br>Getting Ideas D5<br>*AUTOBIOGRAPHY"* 27J*<br>Lesson 18 | 17<br>U1L2D1<br>Prewriting D1<br>*45F*<br>Lesson 19 | 18<br>U1L2D2<br>Prewriting D2<br>*45G*<br>Lesson 20.1 | 19 |
| 20 | 21<br>U1L2D3<br>Prewriting D3<br>*45H*<br>Lesson 20.2<br>*Take Home Assessment | 22<br>U1L2D4<br>Prewriting D4<br>*45I*<br>Lesson 21 | 23 Minimum Day<br>U1L2D5<br>Prewriting D5<br>*AUTOBIOGRAPHY** 45J*<br>Lesson 22- D | 24<br>U1L3D1<br>Drafting D1<br>*61F*<br>Lesson 23-D | 25<br>U1L3D2<br>Drafting D2<br>*61G*<br>Lesson 24 | 26 |
| 27 | 28<br>U1L3D3<br>Drafting D3<br>*61H*<br>Lesson 25.1 | 29<br>U1L3D4<br>Drafting D4<br>*61I*<br>Lesson 25.2- D<br>*In Class Assessment | 30 Minimum Day<br>U1L3D5<br>Drafting D5<br>*AUTOBIOGRAPHY** 61J*<br>Lesson 26 | | | |

# 3rd Grade Pacing Guide 2009 - 2010 October

| Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
|---|---|---|---|---|---|---|
| | | | | 1<br>U1L4D1<br>Revising D1<br>*81F*<br>Lesson 27- D | 2<br>U1L4D2<br>Revising D2<br>*81G*<br>Lesson 28 | 3 |
| 4 | 5<br>U1L4D3<br>Revising D3<br>*81H*<br>Lesson 29 | 6<br>U1L4D4<br>Revising D4<br>*81I*<br>Lesson 30.1 | 7 Minimum Day<br>U1L4D5<br>Revising D5<br>*AUTOBIOGRAPHY** 81J*<br>Lesson 30.2<br>*Take Home Test | 8<br>U1L5D1<br>Proofreading D1<br>*93F*<br>Lesson 31 | 9<br>Professional Development Day- No School | 10 |
| 11 | 12<br>U1L5D2<br>Proofreading D2<br>*93G*<br>Lesson 32 | 13<br>U1L5D3<br>Proofreading D3<br>*93H*<br>Lesson 33 | 14 Minimum Day<br>U1L5D4<br>Proofreading D4<br>*93I*<br>Lesson 34- D | 15<br>U1L5D5<br>Proofreading D5<br>*AUTOBIOGRAPHY** 93J*<br>Lesson 35.1- D | 16<br>U1L6D1<br>Publishing D1<br>*111F*<br>Lesson 35.2- D, M<br>*In Class Assessment | 17 |
| 18 | 19<br>U1L6D2<br>U1 Assessment: Fluency Only<br>Publishing D2<br>*111G*<br>Lesson 36 | 20<br>U1L6D3<br>U1 Assessment: Comprehension<br>Publishing D3<br>*11H*<br>Lesson 37- D | 21 Minimum Day<br>U1L6D4<br>U1 Assessment: Writing<br>Publishing D4<br>*111I*<br>Lesson 38- D | 22<br>U1L6D5<br>U1 Assessment: Spelling/Vocabulary<br>Publishing D5<br>*AUTOBIOGRAPHY** 111J*<br>Lesson 39 | 23<br>Unit Closer<br>U1: Assessment: Checking Skills<br>Publishing<br>*AUTOBIOGRAPHY*<br>Lesson 40.1 | 24 |
| 25 | 26<br>Unit Opener<br>U1 Assessment: Make-Ups<br>Publishing<br>*AUTOBIOGRAPHY*<br>Lesson 40.2<br>*Take Home Assessment | 27<br>Unit Opener<br>U1 Assessment: Make-Ups<br>Publishing<br>*AUTOBIOGRAPHY*<br>Lesson 41 | 28 Minimum Day<br>U2L1D1<br>Summary Paragraph D1<br>*Prewriting/Getting Ideas*<br>Lesson 42- D, M | 29<br>U2L1D2<br>Summary Paragraph D2<br>*Prewriting/Graphic Organizer*<br>Lesson 43 | 30<br>U2L1D3<br>Summary Paragraph D3<br>*Writer's Craft*/ Drafting*<br>Lesson 44 | 31 |

| Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
|---|---|---|---|---|---|---|
| 1 | 2<br><br>U2L1D4<br><br>Summary Paragraph D4<br>*Drafting*<br><br>Lesson 45.1- D, M | 3<br><br>U2L1D5<br>***OCR scores due on OARS***<br><br>Summary Paragraph D5<br>*Revising*<br><br>Lesson 45.2<br>*In Class Assessment | 4 Minimum Day<br><br>U2L2D1<br><br>Summary Paragraph D6<br>*Revising*<br><br>Lesson 121<br>*Don't give homework | 5<br><br>U2L2D2<br><br>Summary Paragraph D7<br>*Conferences*<br><br>Lesson 46 | 6<br><br>U2L2D3<br><br>Summary Paragraph D8<br>*Writer's Craft*/Proofreading*<br><br>Lesson 47- D | 7 |
| 8 | 9<br><br>U2L2D4<br><br>Summary Paragraph D9<br>*Publishing*<br><br>Lesson 48 | 10<br><br>U2L2D5<br><br>Summary Paragraph D10<br>*On Demand*<br><br>Lesson 49 | 11<br><br>Veteran's Day-<br>No School | 12<br><br>U2L3D1<br><br>Responding to Nonfiction D1<br>*Prewriting/Getting Ideas*<br><br>Lesson 50.1- M | 12<br><br>U2L3D2<br><br>Responding to Nonfiction D2<br>*Prewriting/Graphic Organizer*<br><br>Lesson 50.2<br>*Take Home Assessment | 14 |
| 15 | 16<br><br>U2L3D3<br><br>Responding to Nonfiction D3<br>*Writer's Craft*/Drafting*<br><br>Lesson 51- D | 17<br><br>U2L3D4<br><br>Responding to Nonfiction D4<br>*Drafting*<br><br>Trimester 1 Assessment | 18 Minimum Day<br><br>U2L4D5<br><br>Responding to Nonfiction D5<br>*Revising*<br><br>Lesson 52- D, M | 19<br><br>U2L5D1<br><br>Responding to Nonfiction D6<br>*Revising*<br><br>Lesson 53- D | 20<br><br>U2L2D2<br><br>Responding to Nonfiction D7<br>*Conferencing*<br><br>Lesson 54<br>***Math Scores due on Oars After school*** | 15<br><br>*Assign homework that pertains to story/theme during Thanksgiving break |
| 22 | 23<br><br>Thanksgiving Break-<br>No School | 24<br><br>Thanksgiving Break-<br>No School | 25<br><br>Thanksgiving Break-<br>No School | 26<br><br>Thanksgiving Break-<br>No School | 27<br><br>Thanksgiving Break-<br>No School | 28 |
| 29 | 30 ***Report Cards Due!!!!!***<br><br>U2L4D3<br><br>Responding to Nonfiction D8<br>*Writer's Craft*/Proofreading*<br><br>Lesson 55.1- M | | | | | |

# 3rd Grade Pacing Guide 2009 - 20010 December

| Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
|---|---|---|---|---|---|---|
| 30 | | 1<br>U2L4D4<br>Responding to Nonfiction D9<br>*Publishing*<br>Lesson 55.2<br>*In Class Assessment | 2 Minimum Day<br>U2L4D5<br>Fiction Book Review D10<br>*On Demand*<br>Lesson 56- M | 3<br>U2L5D1<br>Research Report D1<br>*Prewriting/Getting Ideas*<br>Lesson 57- M | 4<br>U2L5D2<br>Research Report D2<br>*Writer's Craft*/Prewrting/Graphic Organizer*<br>Lesson 58 | 5 |
| 6<br>Need Materials for Recipe | 7<br>U2L5D3<br>Research Report D3<br>*Drafting*<br>Lesson 59 | 8<br>Minimum Day-Conferences<br>U2L5D4<br>Research Report D4<br>*Drafting*<br>Lesson 60.1 | 9 Minimum Day<br>U2L5D5<br>U2 Assessment: Fluency Only<br>Research Report D5<br>*Revising*<br>Lesson 60.2/65.2<br>*RECIPE | 10<br>Minimum Day-Conferences<br>U2L6D1<br>U2 Assessment: Comprehension<br>Research Report D6<br>*Revising*<br>Lesson 61 | 11<br>Minimum Day-Conferences<br>U2L6D2<br>U2 Assessment: Writing<br>Research Report D7<br>*Conferencing*<br>Lesson 62- M | 12 |
| 13 | 14<br>U2L6D3<br>U2 Assessment: Spelling<br>Research Report D8<br>*Writer's Craft*/Proofreading*<br>Lesson 63 | 15<br>U2L6D4<br>U2 Assessment: Vocabulary<br>Research Report D9<br>*Publishing*<br>Lesson 64 | 16 Minimum Day<br>U2L6D5<br>U2 Assessment: Checking Skills<br>Research Report D10<br>*On Demand*<br>Lesson 65.1<br>*Give 65.2 Assessment | 17<br>Unit Closer<br>U2 Assessment: Make-Ups<br>Lesson 66- M | 18<br>Expo<br>U2 Assessment: Make Ups<br>Lesson 68 | 19 |
| 20 | 21<br>Winter Recess- No School | 22<br>Winter Recess- No School | 23<br>Winter Recess- No School | 24<br>Winter Recess- No School | 25<br>Winter Recess- No School | 26 |
| 27 | 28<br>Winter Recess- No School | 29<br>Winter Recess- No School | 30<br>Winter Recess- No School | 31<br>Winter Recess- No School | | |

# 3rd Grade Pacing Guide 2009 – 2010 January

| Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
|---|---|---|---|---|---|---|
| | | | | | 1<br>Winter Recess-<br>No School | 2 |
| 3 | 4<br>Unit Opener<br>Lesson 67- M | 5<br>Unit Opener<br>Lesson 67- M | 6 Minimum Day<br>U3L1D1<br>Sensory Description: Thing D1<br>*Prewriting/Getting Ideas*<br>Lesson 69- M | 7<br>U3L1D2<br>Sensory Description: Thing D2<br>*Prewriting/Graphic Organizer*<br>Lesson 70.1 | 8<br>U3L1D3<br>*OCR scores due on OARS*<br>Sensory Description: Thing D3<br>*Writer's Craft*/Drafting*<br>Lesson 70.2<br>*Take Home Test | 9 |
| 10 | 11<br>U3L1D4<br>Sensory Description: Thing D4<br>*Drafting*<br>Lesson 72<br>*L. 71 Add telling time to the minute to math mtg. | 12<br>U3L1D5<br>Sensory Description: Thing D5<br>*Revising*<br>Lesson 73 | 13 Minimum Day<br>U3L2D1<br>Sensory Description: Thing D6<br>*Revising*<br>Lesson 74 | 14<br>U3L2D2<br>Sensory Description: Thing D7<br>*Writer's Craft*/Proofreading*<br>Lesson 75.1 | 15<br>U3L2D3<br>Sensory Description: Thing D8<br>*Proofreading*<br>Lesson 75.2<br>*In Class Assessment | 16 |
| 17 | 18<br>Dr. Martin Luther King Jr. Day-<br>No School | 19<br>U3L2D4<br>Sensory Description: Thing D9<br>*Proofreading*<br>Lesson 76- M | 20 Minimum Day<br>U3L2D5<br>Non-rhyming Poetry D10<br>*On Demand*<br>Lesson 77 | 21<br>U3L3D1<br>Rhyming Couplet/Triplet D1<br>*Prewriting/Getting Ideas*<br>Lesson 78 | 22<br>U3L3D2<br>Rhyming Couplet/Triplet D2<br>*Writer's Craft*/Prewriting/Graphic Organizer*<br>Lesson 79 | 23 |
| 24 | 25<br>U3L3D3<br>Rhyming Couplet/Triplet D3<br>*Drafting*<br>Lesson 80.1 | 26<br>U3L3D4<br>Rhyming Couplet/Triplet D4<br>*Drafting*<br>Lesson 80.2<br>*Take Home Test | 27 Minimum Day<br>U3L3D5<br>Rhyming Couplet/Triplet D5<br>*Revising*<br>Lesson 81 | 28<br>U3L4D1<br>Rhyming Couplet/Triplet D6<br>*Revising*<br>Lesson 82- M | 29<br>U3L4D2<br>Rhyming Couplet/Triplet D7<br>*Conferencing*<br>Lesson 83 | 30 |

# 3rd Grade Pacing Guide 2009 - 2010 February

| Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
|---|---|---|---|---|---|---|
| 31 | 1<br>Professional Development - No School | 2<br>U3L4D3<br>Rhyming Couplet/Triplet D8<br>*Writer's Craft*/Proofreading*<br>Lesson 84 | 3 Minimum Day<br>U3L4D4<br>Rhyming Couplet/Triplet D9<br>*Publishing*<br>Lesson 85.1- M | 4<br>U3L4D5<br>Rhyming Quatrain D10<br>*On Demand*<br>Lesson 85.2<br>*In Class Assessment | 5<br>U3L5D1<br>Top-to-Bottom Descr. D1<br>*Prewriting/Getting Ideas*<br>Lesson 86- D | 6 |
| 7 | 8<br>U3L5D2<br>Top-to-Bottom Descr. D2<br>*Writer's Craft*/Prewriting/Graphic Organizer*<br>Lesson 87- M | 9<br>U3L5D3<br>Top-to-Bottom Descr. D3<br>*Drafting*<br>Lesson 88 | 10 Minimum Day<br>U3L5D4<br>Top-to-Bottom Descr. D4<br>*Drafting*<br>Lesson 89 | 11<br>U3L5D5<br>Top-to-Bottom Descr. D5<br>*Revising*<br>Lesson 90.1 | 12<br>U3L6D1<br>U3 Assessment: Fluency Only<br>Top-to-Bottom Descr. D6<br>*Revising*<br>Lesson 90.2<br>*Take Home Test | 13 |
| 14 | 15<br>President's Day- No School | 16<br>U3L6D2<br>U3 Assessment: Comprehension<br>Top-to-Bottom Descr. D7<br>*Conferencing*<br>Lesson 91- M | 17 Minimum Day<br>U3L6D3<br>U3 Assessment: Writing<br>Top-to-Bottom Descr. D8<br>*Writer's Craft*/Proofreading*<br>Lesson 92 | 18<br>U3L6D4<br>U3 Assessment: Spelling<br>Top-to-Bottom Descr. D9<br>*Publishing*<br>Lesson 92 | 19<br>U3L6D5<br>U3 Assessment: Vocabulary<br>Sensory Desc. of a Place D10<br>*On Demand*<br>Lesson 93 | 20 |
| 21 | 22<br>Unit Closer<br>U3 Assessment: Checking Skills<br>Lesson 94 | 23<br>Unit Opener<br>U3 Assessment: Make-Ups<br>Lesson 95.1- M | 24 Minimum Day<br>Unit Opener<br>U3 Assessment: Make-Ups<br>Lesson 95.2<br>*In Class Assessment | 25<br>U4L1D1<br>Persuasive Friendly Letter D1<br>*Prewriting/Getting Ideas*<br>Lesson 96- M | 26<br>U41D2<br>Persuasive Friendly Letter D2<br>*Prewriting/Graphic Organizer*<br>Lesson 96- M | 27 |
| 28 | | | | | | |

# 3rd Grade Pacing Guide 2009 - 2010

## March

| Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
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|---|---|---|---|---|---|---|
| | 1<br><br>U4L1D3<br><br>Persuasive Friendly Letter D3<br>*Writer's Craft*/Drafting*<br><br>Lesson 97 | 2<br><br>U4L1D4<br><br>Persuasive Friendly Letter D4<br>*Drafting*<br><br>Lesson 98- M | 3 Minimum Day<br><br>U4L1D5<br>***OCR scores due on OARS***<br><br>Persuasive Friendly Letter D5<br>*Revising*<br><br>Lesson 99 | 4<br><br>U4L2D1<br><br>Persuasive Friendly Letter D6<br>*Revising*<br><br>Trimester 2 Assessment | 5<br><br>U4L2D2<br><br>Persuasive Friendly Letter D7<br>*Writer's Craft*/Conferencing*<br><br>Lesson 100.1 | 6 |
| 7 | 8<br><br>Professional Development Day- No School | 9<br><br>U4L2D3<br><br>Persuasive Friendly Letter D8<br>*Proofreading*<br><br>Lesson 100.2<br>*Take Home Test | 10 Minimum Day<br><br>U4L2D4<br><br>Persuasive Friendly Letter D9<br>*Publishing*<br><br>Lesson 101- M | 11<br><br>U4L2D5<br><br>Persuasive Friendly Letter D10<br>*On Demand*<br><br>Lesson 102- M<br>***Math Scores Due on OARS*** | 12<br><br>U4L3D1<br><br>Persuasive Business Letter D1<br>*Prewriting/Getting Ideas*<br><br>Lesson 103- M | 13 |
| 14 | 15<br><br>U4L3D2<br><br>Persuasive Business Letter D2<br>*Writer's Craft*/Prewriting/Graphic Organizer*<br><br>Lesson 104- M | 16<br><br>U4L3D3 *Do all of 2nd Read<br><br>Persuasive Business Letter D3<br>*Drafting*<br><br>Lesson 105.1- M | 17 Minimum Day<br>***Report Cards Due!!!!!!***<br>U4L3D4/5<br><br>Persuasive Business Letter D4/5<br>*Drafting/Revising*<br><br>Lesson 105.2<br>*In Class Assessment | 18<br><br>U4L4D1<br><br>Persuasive Business Letter D6<br>*Revising*<br><br>Lesson 106- M | 19<br><br>U4L4D2<br><br>Persuasive Business Letter D7<br>*Conferencing*<br><br>Lesson 107- M | 20 |
| 21 | 22<br><br>U4L4D3<br><br>Persuasive Business Letter D8<br>*Writer's Craft*/Proofreading*<br><br>Lesson 108- M | 23<br>Minimum Day- Conferences<br>U4L4D4<br><br>Persuasive Business Letter D9<br>*Publishing*<br><br>Lesson 109- M | 24 Minimum Day<br>U4L4D5<br><br>Persuasive Business Letter D10<br>*On Demand*<br><br>Lesson 110.1 | 25<br>Minimum Day- Conferences<br>U4L5D1<br><br>Persuasive Paragraph D1<br>*Prewriting/Getting Ideas*<br><br>Lesson 110.2<br>*Take Home Test | 26<br>Minimum Day- Conferences<br>U4L5D2<br><br>Persuasive Paragraph D2<br>*Writer's Craft*/Prewriting/Graphic Organizer*<br><br>Lesson 111 | 27 |
| 28 | 29<br><br>Cesar Chavez Day- No School | 30<br><br>U4L5D3<br><br>Persuasive Paragraph D3<br>*Drafting*<br><br>Lesson 1112- M | 31 Minimum Day<br><br>U4L5D4<br><br>Persuasive Paragraph D4<br>*Drafting*<br><br>Lesson 113 | | | |

| Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
|---|---|---|---|---|---|---|
| | | | | 1<br>U4L5D5<br>Persuasive Paragraph D5<br>*Revising*<br>Lesson 114 | 2<br>Theme Review<br>Lesson 115.1 | 3 |
| 4 | 5<br>Spring Recess-<br>No School | 6<br>Spring Recess-<br>No School | 7<br>Spring Recess-<br>No School | 8<br>Spring Recess-<br>No School | 9<br>Spring Recess-<br>No School | 10 |
| 11 | 12<br>U4L6D1<br>Persuasive Paragraph D6<br>*Revising*<br>Lesson 115.2- M<br>*In Class Assessment | 13<br>U4L62D<br>Persuasive Paragraph D7<br>*Conferencing*<br>Lesson 116-M | 14 Minimum Day<br>U4L6D3<br>Persuasive Paragraph D8<br>*Writer's Craft*/Proofreading*<br>Lesson 116- M | 15<br>U4L6D4<br>Persuasive Paragraph D9<br>*Publishing*<br>Lesson 117 | 16<br>U4L6D5<br>Persuasive Friendly Letter D10<br>*On Demand*<br>Lesson 118- M | 17 |
| 18 | 19<br>U4L7D1<br>U4 Assessment: Fluency Only<br>Persuasive Poster D1<br>*Prewriting/Getting Ideas*<br>Lesson 119 | 20<br>U4L7D2<br>U4 Assessment: Comprehension<br>Persuasive Poster D2<br>*Drafting*<br>Lesson 120.1 | 21 Minimum Day<br>U4L7D3<br>U4 Assessment: Writing<br>Persuasive Poster D3<br>*Writer's Craft*/Revising*<br>Lesson 120.2<br>*Take Home Test | 22<br>U4L7D4<br>U4 Assessment: Spelling<br>Persuasive Poster D4<br>*Proofreading*<br>Lesson 122 | 23<br>U4L7D5<br>U4 Assessment: Vocabulary<br>Persuasive Poster D5<br>*Publishing*<br>Lesson 123 | 24 |
| 25 | 26<br>Unit Closer<br>U4 Assessment: Checking Skills<br>Lesson 124- M | 27<br>Unit Opener<br>U4 Assessment: Make-Ups<br>Lesson 124- M | 28 Minimum Day<br>Unit Opener<br>U4 Assessment: Make-Ups<br>Lesson 132- M | 29<br>U5L1D1<br>Fantasy Narrative D1<br>*Prewriting/Getting Ideas*<br>Lesson 125.1- M | 30<br>U5L1D2<br>Fantasy Narrative D2<br>*Writer's Craft*/Prewriting/Graphic Organizer*<br>Lesson 126- M | |

# 3rd Grade Pacing Guide 2009 - 2010 May

| Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
|---|---|---|---|---|---|---|

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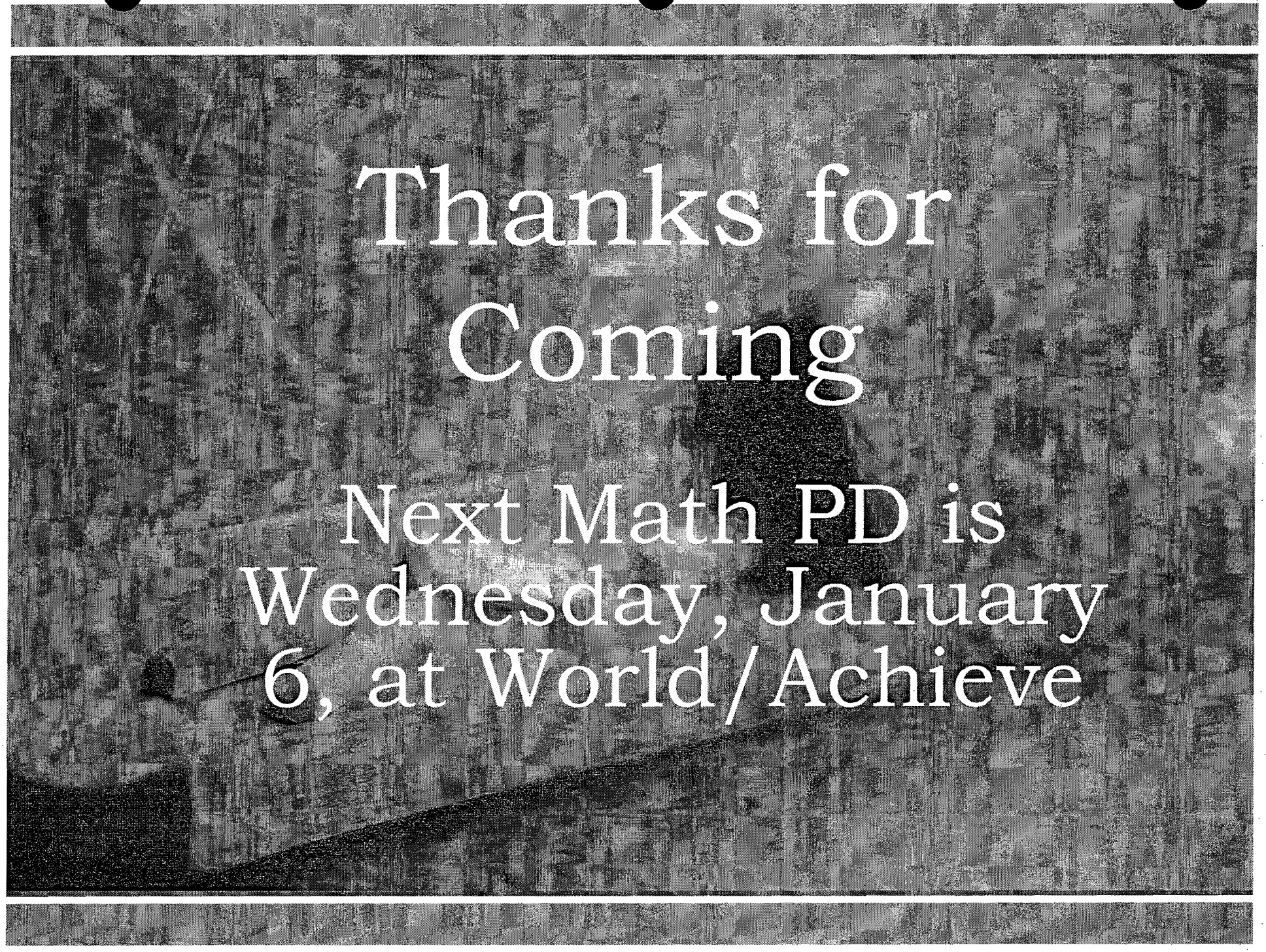
|---|---|---|---|---|---|---|
| | | | | | | 1 |
| 2<br><br>CST WINDOW<br>May 3- May 14 | 3<br><br>U5L1D3<br><br>Fantasy Narrative D3<br>*Writer's Craft*/Drafting*<br><br>Lesson 130.2<br>*Take Home Test | 4<br><br>U5L1D4<br><br>Fantasy Narrative D4<br>*Drafting*<br><br>Lesson 131 | 5 Minimum Day<br><br>U5L1D5<br>***OCR scores due on OARS***<br><br>Fantasy Narrative D5<br>*Revising*<br><br>Lesson 125.2<br>*In Class Assessment | 6<br><br>U5L2D1<br><br>Fantasy Narrative D6<br>*Revising*<br><br>Lesson 127 | 7<br><br>U5L2D2<br><br>Fantasy Narrative D7<br>*Writer's Craft*/Conferencing*<br><br>Lesson 133 | 8 |
| 9 | 10<br><br>U5L2D3<br><br>Fantasy Narrative D8<br>*Proofreading*<br><br>Lesson 134 | 11<br><br>U5L2D4<br><br>Fantasy Narrative D2<br>*Publishing*<br><br>Lesson 135 | 12 Minimum Day<br><br>U5L2D5<br><br>Personal Narrative D10<br>*On Demand*<br><br>Lesson | 13<br><br>U5L3D1<br><br>Mystery D1<br>*Prewriting/Getting Ideas*<br><br>Lesson | 14<br><br>U5L3D2<br><br>Mystery D2<br>*Writer's Craft*/Prewriting/Getting Ideas*<br><br>Lesson | 15 |
| 16 | 17<br><br>U5L3D3<br><br>Mystery D3<br>*Drafting*<br><br>Lesson | 18<br><br>U5L3D4<br><br>Mystery D4<br>*Drafting*<br><br>Lesson | 19 Minimum Day<br><br>U5L3D5<br><br>Mystery D5<br>*Revising*<br><br>Lesson | 20<br><br>U5L4D1<br><br>Mystery D6<br>*Revising*<br><br>Lesson | 21<br><br>U5L4D2<br><br>Mystery D7<br>*Conferencing*<br><br>Lesson | 22 |
| 23 | 24<br><br>U5L4D3<br><br>Mystery D8<br>*Writer's Craft*/Proofreading*<br><br>Lesson | 25<br><br>U5L4D4/5<br><br>Mystery D9/10<br>*Publishing/On Demand*<br><br>Lesson | 26 Minimum Day<br><br>U5L4D1<br><br>Tall Tale D1<br>*Prewriting/Getting Ideas*<br><br>Lesson | 27<br><br>U5L5D2<br><br>Tall Tale D2<br>*Writer's Craft*/Prewriting/Graphic Organizer*<br><br>Lesson | 28<br><br>Memorial Day-<br>No School | 29 |

# 3rd Grade Pacing Guide 2009 - 2010 June

| Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
|---|---|---|---|---|---|---|
| 30 | 31<br>Memorial Day-<br>No School | 1<br>U5L5D3<br>Tall Tale D3<br>*Drafting*<br>Lesson | 2 Minimum Day<br>U5L5D4<br>Tall Tale D4<br>*Drafting*<br>Lesson | 3<br>U5L5D5<br>Tall Tale D5<br>*Revising*<br>Lesson | 4<br>U5L6D1<br>U5 Assessment: Comprehension*<br>Tall Tale D6<br>*Revising*<br>Lesson | 5 |
| 6 | 7<br>U5L6D2<br>U5 Assessment: Writing*<br>Tall Tale D7<br>*Writer's Craft*//Conferencing*<br>Lesson | 8<br>U5L6D3<br>U5 Assessment: Spelling/Vocabulary*<br>Tall Tale D8<br>*Writer's Craft*/Proofreading*<br>Lesson | 9 Minimum Day<br>U5L6D4<br>U5 Assessment: Checking Skills*<br>Tall Tale D9<br>*Publishing*<br>Lesson | 10<br>U56D5<br>*OCR scores due on OARS*<br>Realistic Narrative D10<br>*On Demand*<br>Lesson | 11 ***Report Cards Due!!!!!***<br>U5L7D1<br>Play D1/2<br>*Prewriting/Getting Ideas/Graphic Organizer*<br>Lesson | 12 |
| 13 | 14 Minimum Day<br>U5L7D2<br>Play D3/4<br>*Writer's Craft*/Drafting*<br>Lesson | 15 Minimum Day<br>U5L7D3<br>Play D5/6<br>*Revising*<br>Lesson | 16 Minimum Day<br>U5L7D4<br>Play D7/8<br>*Writer's Craft*/ Conferencing/Proofreading*<br>Lesson | 17 Minimum Day<br>U5L7D5<br>Play D10<br>*Publishing*<br>Lesson | 18 Minimum Day<br>Unit Closer<br>Lesson | 19 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | 29 | 30 | | | |


Thanks for Coming
Next Math PD is Wednesday, January 6, at World/Achieve

# RATIONALE and CLARIFICATIONS FOR UNIT 2 WRITING PACING

**(Done prior to receiving 2008-2009 OCR pacing schedule)**

- The two 10-day and two 5-day writing plans allow teachers MORE time and opportunity to teach our students *all* stages of the writing process.
- The lessons were specifically chosen to give students more opportunity to practice and publish letter writing to prepare for the Unit 2 Skills Assessment.
  - ***NOTE: Replace writing lessons from the OCR TE with the following & in this order. *Notice the length of each writing lesson***

| ***LESSON*** | ***WRITING*** | ***LENGTH*** |
|---|---|---|
| ▪ Unit 2 Lesson 1 | Thank-You Note | 10 days |
| ▪ Unit 2 Lesson 2 | Friendly Letter | 10 days |
| ▪ Unit 2 Lesson 5 | Journal | 5 days |
| ▪ Unit 2 Lesson 3 | Friendly Letter | 5 days |

- Future PD will focus on WRITING. (Seminar, "ON DEMAND" writing, etc…)
- Why include previously taught GUMS and Writer's Crafts in following lessons? Students should be held accountable for applying previously taught material in their writing.

  - ***List of previously taught GUMS (from Unit 1)***
    - Common and Proper Nouns
    - Subject and Object Pronouns
    - Action Verbs
    - Possessive Nouns and Pronouns

- ***List of GUMS (from Unit 2)***
  - Capitalization at Beginnings of Sentences
  - Commas in Greetings and Closings
  - Capitalization of Months and Days
  - Commas in a Series
  - Quotations Marks and Underlining
  - Commas in City, State, and Date

- ***List of previously taught Writer's Crafts (from Unit 1)***
  - Telling in Time Order
  - Effective Beginnings
  - Staying on Topic

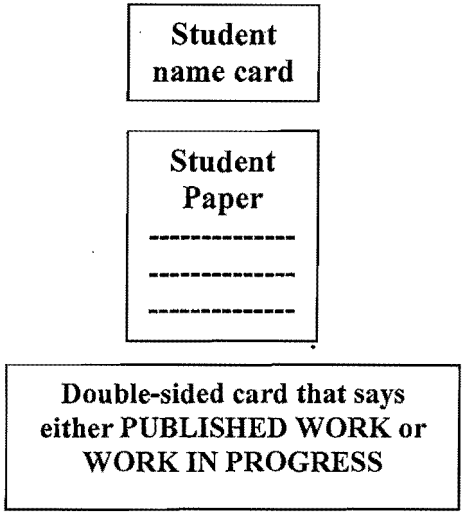
- ***List of Writer's Crafts (from Unit 2)***
  - Tone of a personal letter
  - Sentence Elaboration
  - Personal Letter Structure
  - Sensory Detail
  - Time and Order Words

- **DEFINITIONS:**
  - Seminar: Time in the day that allows students to meet in small groups to read and discuss their work in progress. They will receive critiques/ideas from their group for improving their work.

- ON DEMAND WRITING: An informal writing assessment that takes place on Day 10. Should be given at least once each unit. Students should include all phases of the writing process to complete their work. Teacher will use the results to guide future instruction (prior to Unit 2 assessments). **First ON DEMAND writing will be teacher guided.*

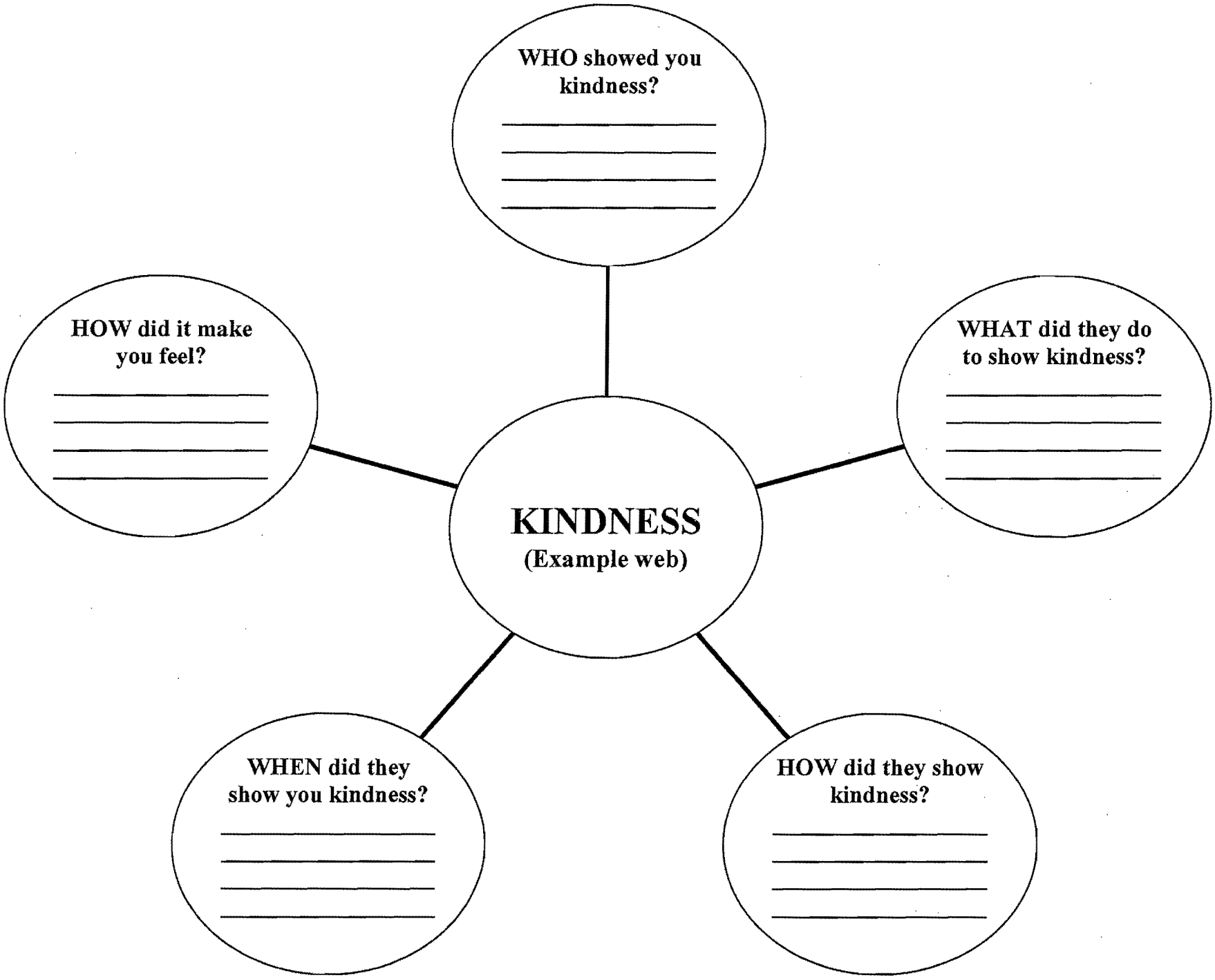
- **KEY:**
  - LA Handbook= Language Arts Handbook
  - Comp. Skills/LA= Comprehension and Language Arts Skills workbook
  - U1 or U2= Unit 1 or Unit 2
  - GUMS= Grammar, Usage, and Mechanics
  - PD= Professional Development

## **IDEA FOR PUBLISHED WORK WALL



# Appropriate SEMINAR Comments and Questions
# TE Appendix p.32

- What was your favorite part?
- I like the part where (or when)
- I like the way you describe…
- What happened after…?
- I'd like to know more about…
- Why did _____ happen?
- What do you think is the most important part?


WHO showed you kindness?
HOW did it make you feel?
WHAT did they do to show kindness?
KINDNESS
(Example web)
WHEN did they show you kindness?
HOW did they show kindness?

# PROOFREADING MARKS

| | | |
|---|---|---|
| ^ | **Add something.** | |
| / | **Make a small letter.** | |
| ⊙ | **Add a period.** | There are nine planets in the solar system⊙ |
| ≡ | **Make a capital letter.** | |
| | **Check spelling.** | |

Writing Pacing

Unit: 2_____ Theme: Kindness_____
Lesson: 1_____ Selection: Mushroom in the Rain_____
Writing: Thank-You Note_____

| WEEK 1 | Day 1 | Day 2 | Day 3 | Day 4 | Day 5 |
|---|---|---|---|---|---|
| • **Objective:** Students will write a thank you note to someone who showed them kindness<br>• **Outcome:** Students will have a published thank you letter.<br>Writing Standards addressed:<br><br>**Standards:**<br>1.1 Group related ideas and maintain a consistent focus<br>1.4 Revise original drafts to improve sequence and provide more descriptive detail.<br>2.2 Write a | **Introduction**<br>Introduce the writing form to students with a lesson on parts of a letter. Show an example of what a letter must include. (**see attached example* OR teacher-generated on chart paper- can use the example in LA Handbook p.65 but remember to include a date, keep posted for future U2 lessons)<br><br>**Parts of a Letter:**<br>-Date<br>-Greeting<br>-Body<br>-Closing<br>-Signature<br><br>NOTE:<br>LA Handbook pages do not include a date in examples, which is | **Prewriting**<br>Have students discuss in partners and then share out whole group: *Why are thank you notes important?*<br><br>Teacher models a brainstorm of types of thank-your notes to write. (on board or overhead)<br><br>**Discuss:**<br>Audience: receiver of the letter.<br>Purpose: to say thank you<br><br>Students choose an idea from the brainstorm and record. After idea is recorded, place in Writer's Notebook.<br><br>Students will state | **Start drafting:**<br><br>**Guided:**<br>Teacher writes date, student writes date. Draft on chart paper in order to continue for the following days.<br><br>Teacher writes greeting, student writes greeting.<br><br>TEACHER CHECKS STUDENTS' DATE AND GREETING.<br><br>Students will put away the beginning of draft in their Writer's Notebook and continue on the following day.<br><br>**WRITERS CRAFT:**<br>Discuss TONE- tone can be serious or | **Web Planning and Finish Drafting:**<br><br>Teacher models using a web to get ideas for the *body* of the letter on the board or overhead (why are you thankful, how did it make you feel)<br>**see attached example.**<br>Students make web. (distribute paper)<br><br>Teacher writes body starting with "Thank you for ____" and telling why.<br>Continue on chart paper started from previous day. (Include a variety of sentences)<br><br>Student writes body on the draft (date & greeting) that was started on the previous day. After | **Revising:**<br><br>Teacher models focus number 1 (did you stay on topic of thank you), then students check for number 1. Continue through focus number 4. *Teacher will model looking at the focus from teacher's model on chart while students are at their seats and looking at their drafts.*<br><br>**Focus:**<br>1. On topic of thank you<br>2. Person is thanked<br>3. You stated WHY<br>4. Tone is friendly<br><br>Remind students of sentence variation, using descriptive language to make |

| | | | | | |
|---|---|---|---|---|---|
| friendly letter complete with date, salutation, body, closing and signature | a 2nd grade OCR Skills Assessment requirement. Stress the importance of writing the date and include it in all of your models. | their purpose: "I want to write a thank you note to _____ for helping me _____."<br><br>Complete Writer's Workbook p. 6 *guided.* | humorous, happy, or sad. A thank-you note should always be friendly and sincere.<br><br>Do Comp. Skills p. 28 and 29 **guided**. On page 29, since we're already writing a letter, students can write a friendly sentence. | completes, students will put their drafts in their Writer's Notebook.<br><br>*Remember to include previously taught GUMS and Writer's crafts (from U1 GUMS- action verbs, common and proper nouns, subject and object pronouns, possessive nouns and pronouns, U1 Writer's CRAFTS- effective beginnings, staying on topic, telling in time order)<br><br>Teacher gives examples of closings (can keep a running list and post in room)<br>From,<br>Sincerely,<br>Your Friend,<br>Love,<br><br>*Make clear to students that the closing used is based on audience<br><br>Teacher writes closing and signature, students write closing | letters interesting. |

| | | | | | |
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| | | | | and signature. | |
| Student Product | None | Have a chosen idea<br>Completed workbook p. 6 | Date, greeting, Comp p. 28 and 29 | Web, completed draft. | Students will have revised paper |
| Connection to GUMS | Capitalization: Remind students to capitalize date, greeting and closing | N/A | Capitalization | Capitalization | N/A |
| Connection to Comprehension Skills/ Strategies | N/A | N/A | N/A | Cause/Effect | N/A |
| Workshop | N/A | N/A | Students can determine the tone of another story. Write: "I think the tone of this story is _____, because _____." | Complete draft if not finished during writing time. | N/A |
| **WEEK 2** | **Day 6** | **Day 7** | **Day 8** | **Day 9** | **Day 10** |
| | **Seminar**<br>*(See TE Appendix p. 32 for seminar procedure & attached example of seminar comments & questions )*<br><br>Whole class reminder of how seminar works.<br>Model appropriate comments and questions. Remind students of focuses, but other comments can be made. | **Proofreading**<br><br>Teacher will model proofreading using proofreading focus and marks. Instruct students to check for one focus item at a time.<br><br>Student will proofread own paper. Student will switch with a partner to proofread. | **Publishing**<br><br>Student will publish work.<br><br>Remind students of neat penmanship. | **Sharing**<br><br>Whole class sharing of thank you letters.<br><br>Students determine their strengths and weaknesses of the thank-you note and how to improve their next writing.<br><br>"I think I did _____well. In my next piece, I hope to improve my _____" | **ON DEMAND WRITING** (NOT OPTIONAL)<br><br>**Topic:** Write a thank you note to your first grade teacher thanking them for something they did to help you.<br><br>Because this is the first "On Demand" writing, it will be teacher guided through think aloud. All phases of writing |

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|---|---|---|---|---|---|
| | **Focus:**<br>1. On topic<br>2. Person is thanked<br>3. You stated WHY<br>4. Tone is friendly<br><br>Students break into small groups for seminar.<br>Students have additional time to revise after seminar. | **Proofreading Focus:**<br>1. All names are correct.<br>2. All capital letters correct.<br>3. All punctuation correct.<br>4. Correct spelling<br><br>*Focus should be charted or posted so that students can refer to them.* | | *Done orally.* | process should be included in student work.<br><br>Students trade papers and "grade" the work based on a student friendly rubric. |
| Student Product | There may be additional revisions. | Paper will be proofread | Published piece created. | | ON DEMAND WRITING |
| Connection to GUMS | N/A | All gums previously taught will be implemented in writing | All gums previously taught will be implemented in writing. | | All gums previously taught will be implemented in writing. |
| Connection to Comprehension Skills/ Strategies | N/A | N/A | N/A | | |
| Workshop | Students can meet for additional seminar time. | Students can continue to proofread work.<br><br>Students can proofread additional sentences. | Publishing can be completed in workshop. | | |

*U2 L1 D1: Mushroom in the Rain*
*Parts of a THANK-YOU NOTE from LA Handbook p.65*

June 26, 2008 ◂ **DATE**

Dear Aunt Winnie, ◂ **GREETING**

Thank you for the great camera. I like taking pictures. ◂ **BODY**
I've taken 24 already. I will send some to you when I get them.

Love, ◂ **CLOSING**
Tony ◂ **SIGNATURE**

*U2 L1 D4: Mushroom in the Rain*
*Examples of CLOSINGS in a THANK-YOU NOTE*
*Make clear to students that the closing used is based on audience

From,

Sincerely,

Your Friend,

Love,

Writing Pacing

Unit: 2_____ Theme: Kindness_____
Lesson: 2_____ Selection: The Elves and the Shoemaker_____
Writing: Friendly Letter_____
OCR Prompt: Write a friendly letter telling about someone who has shown you kindness

| WEEK 1 | Day 1 | Day 2 | Day 3 | Day 4 | Day 5 |
|---|---|---|---|---|---|
| • **Objective:** Students will write a friendly letter telling about someone who has shown them kindness<br><br>• **Outcome:** Students will have a published friendly letter.<br><br>• **Writing Standards addressed:** 1.4 Revise original drafts to improve sequence and provide more descriptive detail. 2.2 Write a friendly letter | **Review**<br>Parts of a letter and show an example of what a letter must include (teacher-generated chart from previous lesson or use LA handbook p. 69).<br><br>-Date<br>-Greeting<br>-Body<br>-Closing<br>-Signature<br><br>Use Language Arts Handbook p. 68<br><br>Brainstorm as a whole class people who showed us kindness and how they showed us kindness. (T-chart) | **Writer's Craft: Sentence Elaboration**<br><br>Introduce ways to elaborate. Tell students it is very important to give details when writing. (See TE p.137G) You can do so by:<br>1. combining sentences<br>2. adding details<br>3. using exact words<br><br>Model (on overhead or chart):<br>*E.g. The cat yawned.*<br>(Have students add more details.)<br>*E.g. Lucy's brown and yellow calico cat lazily yawned and fell asleep.* | **Prewriting**<br><br>Students identify audience and purpose in Writer's workbook p. 10.<br><br>**Partner Talk:**<br>1. Who helped them,<br>2. what they did,<br>3. how they did it,<br>4. how they felt,<br>5. When it happened.<br>(TE Appendix 32, for peer feedback advice.)<br><br>**Web:**<br>Teacher will model web with the elements talked about with partner on chart paper.<br><br>Students make a web | **Drafting:**<br><br>Review prewrite from Day 3 (web)<br><br>Review parts of a letter.<br><br>**Focus:** Sentence elaboration.<br>Have examples posted. (from Day 2)<br>Do an example whole class. Reference charts of interesting descriptive words (teacher-generated).<br><br>Teacher will model draft using previous day's web on chart paper.<br><br>Remind students to stay on topic and use | **Revising:**<br><br>Teacher will check model for each focus.<br><br>Instruct student to check for each focus item, one at a time.<br><br>Focus:<br>1. Sentence elaboration<br>2. Tone is friendly<br>3. Stay on topic<br>4. Is each sentence necessary and important?<br><br>Partner checks for each element. |

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| complete with the date, salutation, body, closing, and signature | Student chooses topic and record. Place chosen topic into Writer's Notebook. | (save examples for review on Day 4)<br><br>Teacher will do a quick review during this stage on sentence structure. Using the teacher model, ask students to identify the subject and predicate. If students are ready, ask students to also identify other parts of speech (e.g. adjectives, adverbs, prepositional phrases, etc.). Teacher will assist when needed. This should be done quickly and reinforced whenever possible.<br><br>Have students complete Comp./LA book p. 34-35 **Whole group** to practice sentence elaboration.<br><br>Have students make a simple sentence and switch with a partner to elaborate. Share | (see attached example) with these elements. Students will place completed webs into their Writer's Notebook.<br><br>*For students who are having difficulty, they can get help from a partner, or sign up to conference with the teacher. | web while writing their drafts.<br><br>Students begin drafting. Hold conferences with any students who are having problems developing a draft. Students will put completed drafts into their Writer's Notebook. | |

| | | | | | |
|---|---|---|---|---|---|
| | | out. | | | |
| Student Product | Student has selected topic | Comp. p. 34&35 Student generated sentences. | Completed Web | Completed draft. | Students will have revised paper |
| Connection to GUMS | Commas in greetings and closings | N/A | N/A | Commas in greeting and closing | N/A |
| Connection to Comprehension Skills/ Strategies | N/A | N/A | Sequencing, main idea and details | N/A | N/A |
| Workshop | N/A | Students should find examples of elaborated sentences in their anthology.<br><br>Students find simple sentences in their anthology and then elaborate them.<br><br>Students write simple sentences and then elaborate them. | Complete prewrite. | Complete draft if not finished during writing time.<br><br>Students should find examples of elaborated sentences in their anthology.<br><br>Students find simple sentences in their anthology and then elaborate them. | Complete revising.<br><br>More sentence elaboration practice. |
| **WEEK 2** | **Day 6** | **Day 7** | **Day 8** | **Day 9** | **Day 10** |
| | **Seminar**<br>*(See TE Appendix p. 32 for seminar procedure & attached example of seminar comments & questions )*<br><br>Whole class reminder of how seminar works.<br>Model appropriate comments and questions. Remind | **Proofreading**<br><br>Teacher will review proofreading marks and proofreading focus by proofreading teacher model.<br><br>Instruct students to check for one focus item at a time. | **Publishing**<br><br>Student will publish work.<br><br>Remind students of neat penmanship. | **Sharing**<br><br>Whole class sharing of thank you letters.<br><br>Students determine their strengths and weaknesses of their friendly letter and how to improve their next writing. | **ON DEMAND WRITING** (NOT OPTIONAL)<br><br>**Topic:** Write a friendly letter about something interesting you have found.<br><br>Because this is the second "On Demand" writing, it will be |

| | | | | | |
|---|---|---|---|---|---|
| | students of focuses, but other comments can be made.<br><br>**Focus:**<br>1. Sentence elaboration<br>2. Tone is friendly<br>3. Stay on topic<br>4. Is each sentence necessary and important?<br><br>Students break into groups for seminar.<br><br>Students have additional time to revise after seminar. | Student will proofread own paper. Student will switch with a partner to proofread. Students will put completed proofread papers into their Writer's Notebook.<br><br>**Proofreading Focus:**<br>1. Commas for greeting and closing.<br>2. Date written correctly<br>3. Spelling | | "I think I did _____well. In my next piece, I hope to improve my _____" | done independently. Remind students to go through the writing process and writer's crafts.<br><br>Teacher grades paper to determine needs to address before Unit 2 assessment. |
| Student Product | There may be additional revisions. | Paper will be proofread | Published piece created. | | ON DEMAND WRITING |
| Connection to GUMS | N/A | All gums previously taught will be implemented in writing | All gums previously taught will be implemented in writing. | N/A | All gums previously taught will be implemented in writing. |
| Connection to Comprehension Skills/ Strategies | N/A | N/A | N/A | N/A | N/A |
| Workshop | Students can meet for additional seminar time. | Students can continue to proofread work.<br><br>Students can proofread additional sentences. | Publishing can be completed in workshop. | N/A | Teacher addresses needs seen on assessment with small groups. |

*U2 L2 D1: The Elves and the Shoemaker*
*Parts of a FRIENDLY LETTER from LA Handbook p.69*

June 6, 2003 ◂ **DATE**

Dear Aunt Grace, ◂ **GREETING**

Guess what I got? Last week I found a puppy hiding in the park. He was all muddy. He was scared and hungry. I took him home. Dad and I fed him and gave him a bath. We named him Patches. Write back soon. ◂ **BODY**

Love, ◂ **CLOSING**
Sam ◂ **SIGNATURE**

Writing Pacing

Unit: 2_____ Theme: Kindness_____
Lesson: 5__ Selection: Corduroy_____
Writing: Journal_____
OCR Prompt: Keep a journal for 5 days.
Prerequisite Skills:

**Follow the OCR schedule for this lesson.**

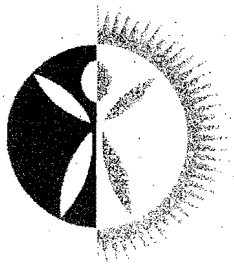
Writing Pacing

Unit: 2_____ Theme: Kindness_____
Lesson: 3____ Selection: The Paper Crane_____
Writing: Friendly Letter_____

| WEEK 1 | Day 1 | Day 2 | Day 3 | Day 4 | Day 5 |
|---|---|---|---|---|---|
| • **Objective:** Students will write a friendly letter telling a friend about an unexpected gift<br><br>• **Outcome:** Students will have a published friendly letter<br><br>• **Writing Standards addressed:** 1.2 Group related ideas and maintain a consistent focus 1.4 Revise original drafts to improve sequence and provide more descriptive detail. | **Review/Getting Ideas**<br>Review parts of a letter and show an example of what a letter must include. (teacher-generated on chart paper from U2L1 or U2L2)<br><br>-Date<br>-Greeting<br>-Body<br>-Closing<br>-Signature<br><br>Use Language Arts Handbook p. 68<br><br>Brainstorm as a whole class people who showed us kindness and how they showed us kindness (t-chart or on overhead). | **Prewriting**<br><br>Review brainstorm ideas for friendly letters from Day 1. Remind students about the following:<br><br><u>Audience:</u> receiver of the letter.<br><br><u>Purpose:</u> to tell about an unexpected gift<br><br>Teacher will model prewrite stating purpose on chart paper.<br><br>Students will then state their purpose: "I want to write a friendly letter to _____ about a gift I received." Once completed, students will put in Writer's | **Drafting**<br><br>Review prewrites from Day 2 (Writer's Workbook p. 14) and parts of a letter.<br><br>Teacher will model filling out web and began drafting a friendly letter using descriptive words. *(see below for what web should consist of)*<br><br>Students will complete a web and begin drafting a friendly letter using descriptive words.<br><br>**Web:**<br>Students make a web with these elements *(elements should be posted for students to* | **Revising/Writer's Craft:**<br><br>Review drafts and parts of a letter:<br><br>-Date<br>-Greeting<br>-Body<br>-Closing<br>-Signature<br><br>Teacher will model revising.<br><br>Teacher will do a quick review on sentence structure. Using the teacher model, ask students to identify the subject and predicate. If students are ready, ask students to also identify other parts of speech (e.g. adjectives, adverbs, | **Proofreading**<br><br>Remind students of proofreading marks and proofreading focus.<br><br>Teacher will model proofreading teacher model.<br><br>Student will proofread own paper. Student will switch with a partner to proofread.<br><br>**Proofreading Focus:**<br><br>1. Commas for greeting and closing.<br>2. Date written correctly<br>3. Spelling |

| | | | | | |
|---|---|---|---|---|---|
| 2.2 Write a friendly letter complete with the date, salutation, body, closing, and signature | Student chooses topic and records. Place in Writer's Notebook once completed. | Notebook.<br><br>Complete Writer's Workbook p. 14 | *refer to)*:<br>1. What did you receive 2. Who gave it to you, 3. How did it make you feel, 4. When did you receive the gift, 5. Why is the gift important?<br><br>*For students who are having difficulty, they can get help from a partner, or sign up to conference with the teacher. | prepositional phrases, etc.). Teacher will assist when needed. This should be done quickly and reinforced when ever possible.<br><br>Instruct students to check for each focus item, one at a time<br><br>**Focus:**<br>1. All parts of a letter are in place<br>2. Tone is friendly<br>3. Stay on topic<br>4. Did you use detailed sentences about your gift?<br><br>Partner checks for each element.<br><br>Remind students to stay on topic and use web. | ***Note: Publish if time permits*<br><br>***There are 3 extra days in this unit before you start the next. You can use those 3 extra days to publish, share, and do an On Demand Writing for this lesson.* |
| Student Product | Student has selected topic | Writer's Workbook p. 14 | Completed Web and draft | Completed draft. | Students will have revised paper |
| Connection to GUMS | Commas in greetings and closings | N/A | N/A | Commas in greeting and closing | N/A |

| | | | | | |
|---|---|---|---|---|---|
| Connection to Comprehension Skills/ Strategies | N/A | N/A | Sequencing, main idea and details | N/A | N/A |
| Workshop | N/A | Students can practice labeling parts of a letter. (Refer to Comp/LA page 38-39) | Students complete web.<br><br>Students can find descriptive words in sentences from their Anthology. | Complete draft if not finished during writing time. | Complete revising and/or proofreading. |



Education

# Open Court Routine Cards

# Sound-by-Sound Blending

## Purpose:

- To teach students a strategy for figuring out unfamiliar decodable words.

## Procedure:

- Create a consistent routine for getting students seated in rows on the rug.
- Begin the blending routine when and only when, all students are seated and quietly focused.
- State the objectives of the lesson.
- Place the sound spelling card(s) in the tray or attached to the board near the blending lesson.
- Review the sound spelling(s) by stating the name, sound and spelling.
- Write the spelling for the first sound. As you are writing, make sure you are not blocking the view of any of your students. Teacher should be standing so he/she can see the students. Point to the spelling.
- Have students say the sound.
- Write the spelling for the next sound. Touch the spelling. If the sound has more than one letter representing the sound, touch all of the letters.
- Have students say the sound as you touch the spelling again.
- Repeat with each sound spelling.
- After the vowel spelling is written, blend through the vowel, making a blending motion – a smooth sweep of the hand beneath the sounds, linking them from left to right as students blend the sounds through the vowel.
- Write the spelling of the next sound. Point to the spelling.
- Have students say the sound.
- Continue as described above through the word.
- After the final sound is pronounced, make the blending motion from left to right under the word as students blend and read the words.
- Have students reread the word naturally (fluently) as they would speak it.
- After blending every word in the line, have students reread the blended line fluently.
- Continue the procedure for all blending lines.
- After all of the words are blended, have the students reread every word blended.
- Review About the Words and Sentences as indicated. **Please note that the default of About the Words and Sentences is to complete the activities after each line blended unless otherwise indicated in the TE.**
- Review blended words using activities in Developing Oral Language.

**Please make sure that if the spelling of a given sound is more than one letter, you point to each spelling for the sound. For example, if the /j/ sound is spelled with either ge or dge, you use two or three fingers at the same time when blending the sound.**

- **A quick clarification (not a lengthy explanation) of the meaning of a word is acceptable if needed.**

# Routine Card

- **Write the spelling for the first sound**
- **Have students say the sound.**
- **Write the spelling for the second sound.**
- **Have students say the sound.**
- **If the second sound is a vowel, blend through the vowel making a blending motion with your hand.**
- **Write the spelling of the next sound.**
- **If it is the last sound in the word, make the blending motion as students blend and read the word; if it is not the last sound, continue writing the spellings.**
- **Students reread the word naturally (fluently) as they would speak it.**
- **Complete a line and have the students read the words in the line.**
- **Review blended words using activities in Developing Oral Language**
- **Have students use two or three words in separate sentences and extend the sentences. (if time permits)**

# Whole-Word Blending

## Purpose:

- To provide students with an intermediate strategy as a transition between sound-by-sound blending and reading words with automaticity.
- Once students are comfortable with sound-by-sound blending, they are ready for whole word blending.

## Procedure:

- Create a consistent routine for getting students seated in rows on the rug.
- Begin the blending routine when and only when all students are seated and quietly focused.
- State the objectives of the lesson
- Place the sound spelling card(s) in the tray or attached to the board near the blending lesson.
- Review the sound spellings(s) by stating the name, sound and spelling of the card.
- Write the whole word to be blended. As you are writing, make sure you are not blocking the view of any of your students.
- Ask students to say the sounds as you point to each spelling. Make sure all students can see every word and the blending procedure.
- After the final sound is pronounced, make the blending motion from left to right under the word as students read the word.
- Continue the blending procedure for all of the words.
- If students have difficulty blending and/or reading the word, drop back and blend using the sound-by-sound blending procedure.
- When all of the words have been blended, point to the words randomly and ask individuals to read them.
- Extend the sentences using –What? When? Where? How? prompts.
- Complete the activities in About the Words and Sentences per the directions. Please note that the default of About the Words and Sentences is to complete the activities after each line blended unless otherwise indicated in the TE.
- Review blended words using activities in Developing Oral Language.
- Ask students to use two or three words from the blending lesson in separate sentences and extend the sentence using – What? When? Where? How? prompts.

**Please make sure that if the spelling of a given sound is more than one letter, you point to each spelling for the sound. For example if the /j/ sound is spelled with either ge or dge, you should use two or three fingers at the same time when blending the sound.**

## Routine Card

- Write the whole word.
- Point to each spelling and have the students give the sound.
- Have students say the sound for each spelling.
- Have the students blend the sounds and say the word.
- Have students read the word naturally (fluently).
- Complete activities in About the Words and Sentences per the directions.

Review blended words using activities in Developing Oral Language.

# Sentence Blending

## Purpose:

- To blend sentences and develop fluency.
- To encourage students to reread sentence with phrasing and natural intonation (fluently).

## Procedure:

- Introduce any High-Frequency words as follows:
  - Write the word on the board
  - Asks students to raise their hands if they know the word. If they know the word, call on a student to read the word and then have the other students chorally repeat the word. If the students do not know the word, the teacher reads the word and then the students chorally read the word.
  - The teacher points to each letter and asks the students to chorally spell the word and then the students chorally reread the word.
  - The teacher and/or the students use the word in a sentence.
- Write the sentence letter by letter (sound-by-sound blending procedure) on the board blending every word except the HF words. Position you body so every student can read the words. Underline each HF word as it is written on the board. The line under the word indicates that it is a HF word and cannot be blended. **When the students have progressed to whole-word blending, write the sentence one word at a time blending the words using the whole-word blending routine still underlining the HF words. Remember to always drop back to sound-by-sound blending when needed. Second and third grade students should begin the year with whole word and multi-syllabic blending and drop back to sound by sound blending as needed. (See the multisyllabic blending procedure and routine card)**
- Have students reread the sentence fluently using expression and intonation. **If necessary have them reread the sentence several times for fluency**

**Please make sure that if the spelling of a given sound is more than one letter, you point to each spelling for the sound. For example, if the /j/ sound is spelled with either ge or dge, you use two or three fingers at the same time when blending the sound.**

## Routine Card

- Teach the nondecodable high-frequency words in the sentence first.
- Then blend the sentence:
    1. write the sentence as you blend
    2. Use sound-by-sound blending then progress to whole-word blending for each decodable word in the sentence.
       Read and underline each HF word in the sentence
       **Second and third grade students should begin the year with whole word and multisyllabic blending and drop back to sound-by-sound blending as needed. (See the multisyllabic blending procedure and routine card.)**
- Have students read the sentence and then reread it fluently.

# Multi-Syllabic Blending

## Purpose:

- To provide students with a strategy for blending multisyllabic words.

## Procedure:

- Create a consistent routine for getting students seated in rows on the rug.
- Begin the blending routine when and only when all students are seated and quietly focused.
- State the objectives of the lesson.
- Place the sound spelling card(s) in the tray or attached to the board near the blending lesson.
- Review the sound spelling(s) by stating or having the students state the name, sound and spelling of the card.
- Position your body so every student can read the words.
- Have students blend the first syllable using sound-by-sound or whole word blending strategy, whichever is appropriate based on students' need.
    - **Sound-by-sound blending strategy:** Write each word, syllable letter by letter, blending through the vowel (see sound-by-sound blending routine card) and read the syllable. Cover the previous syllable with an index card or part of a sentence strip, read and continue the procedure with the next syllable. Continue the procedure until all syllables are blended. After the final sound of the last syllable has been pronounced, make the blending motion from left to right under the entire word as students put all the syllables together to read the word. Reread the word fluently. **This type of syllable blending is for those students who are unable to blend the syllable using the whole word technique.**

    - **Whole word blending strategy (see whole word blending routine card):** Write the entire word on the board. Blend each syllable using the whole word procedure as if each syllable is a word. Cover each syllable as blended so you are always only showing the syllable you are currently blending. When all syllables have been blended, make the blending motion from left to right under the entire word as students put all the syllables together to read the word Reread the word fluently.

# Word Knowledge

## Purpose:

- To provide students with additional practice in decoding and fluent prosodic reading of words.
- To provide students with activities to teach additional strategies for figuring out any unfamiliar words they encounter as they read.

## Procedure:

- Word knowledge words should be printed on a chart.
- Teacher places highlighted S/S cards near the Word Knowledge Chart.
- Ask students to read line 1 (with little or no teacher voice), stopping to blend, using the established blending procedure, any words the students have trouble reading.
- After students read Line 1 (or lines 1,2 etc. as directed in About the Words and Sentences), prompt students to identify and point out the focus concepts as indicated in About the Words and Sentences.
- Directly instruct the focus concepts as noted in About the Words and Sentences if needed.
- Repeat for the remaining lines.
- Have students read sentence 1 (with minimal or no teacher voice). Be aware of prosody as you move your cueing device. **Use cueing device only if needed.**
- Prompt students to identify and point out the focus concepts as noted in About the Words and Sentences.
- Directly instruct the focus concepts if needed.
- Repeat for the remaining sentences.

## Clarifications:

- Word Knowledge lessons should be prewritten on a chart.
- Lines should be numbered and may be written in different colors to help focus the students.
- Word knowledge is not a blending lesson. Students are to read the words. If they have trouble reading a specific word, then teacher should direct students to blend using the blending procedure.
- Sound Spelling Cards should be referenced as needed.

## Routine Card

- Teacher places highlighted S/S cards near the Word Knowledge Chart.
- Students read line 1 with minimal or no teacher voice (or lines 1,2,3 etc. as indicated in About the Words and Sentences), stopping to blend any trouble words.
- After students read the line/s, prompt students to identify and point out structural elements as noted in About the Words and Sentences.
- Directly instruct structural elements if needed.
- Repeat for the remaining lines.
- Students read sentence 1(with minimal or no teacher voice) with fluency and prosody as prompted by the teacher.
- Prompt students to identify and point out structural elements as noted in About the Words and Sentences.
- Directly instruct structural elements if needed.
- Repeat for the remaining sentences.

# Dictation: Word Building/Letter Cards

## Purpose:

- To give students the chance to practice using the sounds and spellings they are learning.
- To allow students to exercise and practice their segmentation abilities.

## Procedure:

- Prepare the letter cards needed for the lesson ahead of time and clip letters needed for each student together, put them in individual baggies, or put them in baseball card sleeves.
- Students should be seated at their seats for this activity.
- Sound/Spelling Cards should be visible to all students.
- Say the word clearly
- Use the word in a complete sentence.
- Repeat the word.
- Have students say the word.
- Have students segment the individual sounds of the word. Assist when necessary.
- Teacher should walk around to monitor.
- Have students check the Sound/Spelling Cards and pull down the correct letter.
- Physically pull down the correct card and set it on the tray or tape it to the board so students can see it clearly. (This is done early in the school year for Word Building.)
- Continue the procedure until word is spelled.
- As the students are spelling the word letter by letter, write the word letter by letter on the board.
- Have the students compare their word to yours and proofread as needed by replacing incorrect letter cards with correct letter cards.
- Sweep under the word left to right in a blending motion so students can blend and then read the word.
- Continue this procedure with the remaining words.
- Use the Whole-Word Strategy as the lessons progress as follows:

  Say the word, use it in a sentence, and repeat the word.
  Have students say the word.
  Have students check the Sound/Spelling Cards
  Have students spell the word.

# Word Building Routine Card

- Say the word, use it in a sentence, and repeat the word.
- Have students say the word.
- Say the word slowly, sound by sound.
- Have students say the first sound.
- Have students check the Sound/Spelling Cards and pull down the correct letter card. (Early in the process, physically point to and touch the appropriate card.)
- Continue until word is spelled.
- As the students are spelling the word letter by letter, write the word letter by letter on the board.
- Have the students compare their word to yours and proofread as needed by replacing incorrect letter cards with correct letter cards.
- Blend and read the word with students.
- Continue this procedure with the remaining words.

**As the lesson progress, Word Building can be done using the Whole-Word Strategy.**

# Dictation: Word Building/Whole-Word

## Purpose:

- To give students the chance to practice using the sounds and spellings they are learning.
- To allow students to exercise and practice their segmentation abilities.

## Procedure:

- Students should be seated at their seats for this activity.
- Sound/Spelling Cards should be visible to all students.
- Each student should have paper and pencil. Students should be instructed to use proofreading procedure and not erase during instruction.
- Say the word clearly.
- Use the word in a complete sentence.
- Repeat the word clearly.
- Have the students say the word and then segment the word.
- Have students think about the sounds they hear and check the Sound Spelling Cards for the correct spelling(s).
- Have students write down the word.
- After giving students a moment to write, write the word on the board as a model.
- Have students proofread and correct their work if needed. Remind students to circle any words that they can make better and write them correctly above or beside their original work. (circled word)
- Blend and read the words with students.
- Continue this procedure with the remaining words.

## Spelling: Word building/Whole-Word Routine Card

- Say the word, use it in a sentence and repeat the word.
- Have students say the word and segment the word.
- Have students think about the sounds they hear and check the Sound/spelling Cards.
- Have students write down the word.
- After giving students a moment to write, write the word on the board as a model.
- Have students proofread and correct their work using the proofreading procedure.
- Blend and read the words with students.

Continue this procedure with the remaining words.

# Dictation: Sounds in Sequence

## Purpose:

- To teach students to spell words based on the sounds and spellings.
- To teach students to use their knowledge of the sound spelling system (cards) to identify and record the sounds they hear in words.
- To develop students' visual memory for words (spelling ability) in order to increase their writing fluency.

## Procedure:

- Students should be seated at their desks.
- Students should have paper in the form of a dictation template, lined paper formatted for dictation and spelling, a dictation notebook or when directions indicate, their Phonics Skills Workbook (first grade).
- Students should have a pencil without an eraser or instructed not to erase during dictation
- Students should have a proofreading pen or pencil.
- Every Sound Spelling cards should be accessible to all students.

**Please note that this is a learning experience; not a test. Students are encouraged to ask for help as needed.**

**Proofreading is an integral part of dictation and leads to students' self correction.**

- Say the word.
- Use the word in a sentence.
- Repeat the word.
- Have the students repeat the word.
- Have students think about the word and say the first sound they hear in the word.
- Have students check the Sound/Spelling Cards for the first sound and spelling.
- Ask students to point to and name the spelling. (Early in the process, and as long as necessary, physically point to and touch the appropriate card.)
- If students aren't sure, or the sound could be spelled more that one way, encourage students to ask, "Which spelling of /__/ is it?"
- Have students write the spelling.
- Ask students to say the second sound they hear in the word.
- Follow the above procedure with the third, fourth etc. sound until the word is completed.
- Students then proofread the writing of the word.

**Proofreading Procedure:**

- Ask students to raise their hands if they know the spelling for the word.
- Choose a student to spell the word and write the word on the board.
- Ask students to check the spelling of the word they wrote.
- If a student misspelled the word, have student circle the entire word and write it correctly, above or next to the misspelled one. **Circle the word and make it better**
- Repeat proofreading steps for each dictated word.

# Routine Card

- Say the word, use the word in a sentence, and repeat the word
- Have students say the word.
- Have students say the first sound.
- Have students point to the correct Sound/Spelling and say the spelling. (Early in the process, physically point to and touch the appropriate card.)
- Have students write the spelling.
- Complete the spelling of the remainder of the words in the same manner.
- Students proofread (Circle any incorrect words and rewrite them. **Circle and make it better.)**

# Dictation: Whole-Word

## Purpose:

- To give students the opportunity to practice the dictation spelling strategy with less help from the teacher.
- To develop students' visual memory for words (spelling ability) in order to increase their writing fluency.

## Procedure:

- Students should be seated at their desks.
- Students should have paper in the form of a dictation template, lined paper formatted for dictation and spelling, a dictation notebook or when directions indicate, their Phonics Skills Workbook (first grade).
- Students should have a pencil without an eraser.
- Students should have a proofreading pen or pencil.
- Every Sound/Spelling card should be accessible to all students.

**Please note that this is a learning experience; not a test. Students are encouraged to ask for help as needed.**
**Proofreading is an integral part of dictation and leads to students' self correction.**

- Say the word.
- Use the word in a sentence.
- Repeat the word.
- Have the students repeat the word.
- Tell students to think about, segment the word, and show with their fingers (first grade) the segmentation of the word into the sounds they hear in the word. (As a scaffold the teacher asks the students to show with their fingers the segmentation of the word into sounds. This is usually done in first grade and with students having difficulty hearing and segmenting the sounds in grades 2 & 3.)
- Have students check the Sound/spelling Cards for each spelling.
- Instruct students to ask questions if they are unsure of which spelling to use.
- Ask students to write the word.
- After each line, have students proofread their work using the proofreading procedure. (See the Dictation: Sounds in Sequence Routine card for the Proofreading Procedure)

## Dictation: Whole-Word Routine Card

- Say the word.
- Use the word in a sentence.
- Repeat the word.
- Have students say the word.
- Have students think about the word and segment the word into sounds.
- Have students check the Sound/Spelling Cards for the correct spelling(s).
- Have students write the spelling(s) for each sound.
- After each line, write or have a student write the words on the board
- Students proofread (Circle any incorrect words and rewrite them above or beside the circled incorrectly spelled word.)

# Dictation: Sentence

## Purpose:

- To help students apply the dictation spelling strategy to writing sentences.
- To support the development of fluent and independent writing.
- To help students apply the corrections of written language, such as capitalization and punctuation.

## Procedure:

- **Students should be seated at their desks.**
- Say the complete sentence aloud.
- Remind the students to capitalize the first word in the sentence.
- Dictate one word at a time following the procedure for Sounds-in-Sequence Dictation. As students learn to write more independently, the whole sentence can be dictated using the Whole-Word Dictation procedure.
- Continue the procedure for each word in the sentence.
- Remind students to use end punctuation at the end of the sentence.
- Have students read the sentence they have written.
- Proofread the sentence following the stated proofreading procedure located on the Dictation: Sounds-in-Sequence Dictation procedure and routine card.

## Dictation: Sentence Routine Card

Say the sentence.

- Dictate one word at a time following the Sounds-in-Sequence or Whole-Word Dictation procedure and routine depending upon the needs and achievement level of your students.
  Remind students to use capitals at the beginning and to use end punctuation.
- Have students read the sentence they have written.
- Write or have students write the sentence on the board.
- Have students proofread using the stated proofreading procedure.

# Pre-Decodable (Kindergarten)

## Purpose:

- To provide students with a meaningful "reading" experience before they are actually reading on their own.
- To expand their awareness and knowledge of letter names, shapes, and sounds and uses of print.
- To become familiar with high-frequency words.

## Procedure:

- **Students should be seated on the rug.**
- Teach new non-decodable, high-frequency words. The following is the procedure for each new word:
  - Teacher writes the word on the board.
  - Teacher reads the word.
  - Teacher uses the word in a complete sentence.
  - Teacher reads the word again.
  - Students are asked to chorally read the word.
- Review previously introduced words by leading students to chorally read each word. Take every opportunity to focus students' attention to these words in the context of daily Big Book reading and in classroom print.
- Show/repeat rebus pictures before handing the book to students.
- Give each student a copy of the pre-decodable book. Explain that you will read the book together.
- Hold up your copy of the book so students can see it. Read the title, pointing to each word.
- Reread the title and have students chorally read it with you.
- Point to and read the author's name. Explain that the author is the name of the person who wrote the book.
- Point to and read the illustrator's name and explain that this is the person who drew the pictures in the book.
- Give students an opportunity to browse through the book, commenting on what they see in the pictures and making predictions about what the story will tell them.
- **First Read:** Read the book aloud **all** the way through without stopping. As you read, move your hand beneath the words to show the progression of print.
- Pause at each rebus as you say the word it represents, pointing first to the rebus, then to the word beneath it.
- Encourage students to move their hands from left to right across the text as you read together.
- **Second Read:** Reread the book. This time after you read each page stop and have the students chorally read the page with you.
- **Third Read:** Read the title aloud then lead a choral reading of the book with the students.

**Responding:**

- After reading answer any questions the students might have about the book. Encourage them to discuss the illustrations to tell what they liked best about the story.

**Rereading:**

- Provide many opportunities for students to partner-read.
- During Workshop, encourage partners to take turns rereading pages in the book.

## Pre-Decodable Routine Card

- Introduce the new High Frequency words.
- Review previously introduced High Frequency words.
- Show and say the title, author, and illustrator of the Pre-Decodable
  Discuss what the author and illustrator do.
- Show/repeat rebus pictures before handing the book to students.
- Pass books out, browse, predict, and look at pictures (1-2 minutes)
- Reading decodable as follows:
  1. **First read – Read the book all the way through without stopping.**
  2. **Second read – Teacher reads a page, students chorally read the page with the teacher.**
  3. **Third read – Students (lead by the teacher) CHORALLY read together page by page.**
- Find/Locate High Frequency words in the text.

Check for understanding – Reading and Responding (see the directions in the TE)

# Pre-Decodable (1st)

## Purpose:

- To provide students with a meaningful "reading" experience before they are actually reading on their own.
- To expand their awareness and knowledge of letter names, shapes, and sounds and uses of print.
- To become familiar with high-frequency words.

## Procedure:

- **Students should be seated on the rug.**
- Teach new non-decodable, high-frequency words. The following is the procedure for each new word:

  Teacher writes the word on the board.
  Teacher reads the word.
  Teacher uses the word in a complete sentence.
  Teacher reads the word again.
  Students are asked to chorally read the word.
  Students are lead by the teacher to chorally spell the word.

- Review previously introduced words by leading students to chorally read each word. Take every opportunity to focus students' attention to these words in the context of daily Big Book reading and in classroom print.
- Go over the rebus pictures before distributing the book to students.
- Give each student a copy of the pre-decodable book. Explain that you will read the book together.
- Hold up your copy of the book so students can see it. Read the title, pointing to each word.
- Reread the title and have students chorally read it with you.
- Point to and read the author's name. Explain that the author is the name of the person who wrote the book.
- Point to and read the illustrator's name and explain that this is the person who drew the pictures in the book.
- Give students an opportunity to browse through the book, commenting on what they see in the pictures and making predictions about what the story will tell them.
- **First Read:** Read the book aloud. As you read, move your hand beneath the words to show the progression of print.
- Pause at each rebus as you say the word it represents, pointing first to the rebus, then to the word beneath it.
- Encourage students to move their hands from left to right across the text as you read together.
- **Second Read:** Reread the book. This time after you read each page stop and have the students chorally read the page with you.
- **Third Read:** Read the title aloud then lead a choral reading of the book with the students.

**Responding:**

- After reading answer any questions the students might have about the book. Encourage them to discuss the illustrations to tell what they liked best about the story.

**Rereading:**

- Provide many opportunities for students to partner-read.
- During Workshop, encourage partners to take turns rereading pages in the book.

## Pre-Decodable Routine Card

- Introduce the new High Frequency words.
- Review previously introduced High Frequency words.
- Show and say the title, author, and illustrator of the Pre-Decodable
  Discuss what the author and illustrator do.
- Show/repeat rebus pictures before handing the book to students.
- Pass books out, browse, predict, and look at pictures (1-2 minutes)
- Reading decodable as follows:
  1. **First read – Read the book all the way through without stopping.**
  2. **Second read – Teacher reads a page, students chorally read the page with the teacher.**
  3. **Third read – Students (lead by the teacher) CHORALLY read together page by page.**
- Find/Locate High Frequency words in the text.

Check for understanding – Reading and Responding (see the directions in the TE)

# Decodable Books (Kindergarten)

**Purpose:**

- To provide students with the opportunity to practice applying their expanding knowledge of the sound/spelling correspondences they are learning.
- To develop automaticity with the code, high-frequency words, and reading fluency.

**Procedure:**

- **Students should be seated on the rug.**
- Review high-frequency words.
- Blend any new words using the blending procedure.
- Discuss the Title, Author and Illustrator of the book.
- Distribute copies of the book.
- Have the students read the title and browse the book.
- Provide the students an opportunity to orally comment on whatever they notice in the text or illustrations to the total group or to a partner.
- Lead a short discussion focusing on what the students predict the story is about.
- Read the Decodable book as follows:

  **First Read** - Teacher reads the book page by page and the children follow using their pointer finger.

  **Second Read** - Teacher reads one page and students read the same page chorally. Continue reading procedure for the entire book.

  **Third Read** - Students chorally read the entire book with the teacher.

  1. Words the students have difficulty with can be blended.
  2. If students have difficulty with high-frequency words, pronounce the words for the students.

- After the third read select different groups of students to read each individual page.
- Responding section (See TE)

## Decodable Book Routine Card (K)

- Review high-frequency sight words.
- Blend new words
- Title, Author, Illustrator
- Pass out the decodable books and browse.
- Read the Decodable book as follows:
  - First Read – Teacher reads page by page and the students follow.
  - Second Read: Teacher reads a page and the students chorally read the page.
  - Third Read: Students chorally read the entire book.
- Select different groups of students to read each individual page.
- Find high frequency words in the text.
- Responding section (see TE)

Reread Decodable book (partner reading or choral read) to build fluency.

# Decodable Books (grades 1-3)

## Purpose:

- To provide students with the opportunity to practice applying their expanding knowledge of the sound/spelling correspondences they are learning.
- To develop automaticity with the code, high-frequency words, and reading fluency.

**Procedure:**

- **Students should be seated on the rug.**
- Teach new non-decodable, high-frequency words.

**Beginning First Grade**

Teacher writes the word on the board.
Ask students to say the word.
Pronounce the word and have students repeat the word.
Teacher and students spell the word together.
A student (volunteer or someone the teacher selects) uses the word in a complete sentence.
Repeat the procedure for all additional HF words

**Grades Unit 7 first grade, 2nd & 3rd grades**

Teacher writes the word on the board.
Students read the word.
Students spell the word.
A student (volunteer or someone the teacher selects) uses the word in a complete sentence.
Repeat the procedure for all new HF words.

- Review Sound/Spelling Card(s) (name, sound, spelling) related to the phonics focus of the decodable text.
- Distribute copies of the book.
- Have the students read the title and browse the book.
- Provide the students an opportunity to orally comment on what they predict or notice in the text or illustrations to the total group or to a partner.
- Lead a short discussion focusing on what the students predict the story is about. Encourage students to use academic language. "I predict _____."
- Have students read the Decodable book as follows:
    1. Have students read the first page to themselves silently. If early first grade, have the students mumble read (first grade progresses to fish read then silent read) the page.
    2. Have the students chorally read the page.
    3. Words the students have difficulty with can be blended together, reminding students to check the Sound/Spelling Cards for help.
    4. Blend the word on the board if needed.

5. If students have difficulty with non-decodable words, pronounce the words for the students.
6. Repeat the procedure for each page.
7. Have students **reread** the decodable chorally.

**Responding:**

- Prompt students to respond in complete sentences.
- Ask students to discuss any hard words they found in the story, and how they figured out these words.
- Call on students to retell the story in their own words.
- Ask questions about the story as they are presented in the TE .
- Have student(s) respond by pointing to the words in the text that answer the questions and then reading aloud the words.
- **Have students reread the Decodable book with a partner.**

## Decodable Book Routine Card

- Teach the non-decodable, high-frequency sight words.
- Have the students read the title, browse, and then predict and/or discuss what the story is about.
- Read the Decodable book.
  Students:
  - Read a page silently, then read the page chorally
  - Blend decodable words and refer to the Sound/Spelling Cards as necessary.
  - Continue with the remaining pages

Respond to the story. Students:

- Discuss hard words.
- Retell the story.
- Respond to the questions by pointing to the answers.

Reread Decodable book (partner reading or choral read) to build fluency.

# Clues, Problems, and Wonderings

## Purpose:

- To encourage students to set their own goals and expectations about the selection.
- To increase student engagement with the text.

## Procedure:

- Students should be seated at their desks with their anthologies open to the selection.
- The Clues, Problems, and Wonderings Chart should be posted on the front board so every student can see the information that is charted.
- Teacher should have students define and give examples of clues, problems and wonderings.
- Students should browse the entire selection if it is expository text **but only the first few pages if it is not expository text.**
- Students identify and share clues, problems and wonderings as they find them **in** the selection. They do not have to report them in **any particular order.**

  **Possible sources for clues: title, content, author, illustrator, specific genre, illustrations (charts, graphs, etc.)**

  **Possible problems: words with unknown meaning, long or difficult sentences, confusing illustrations (charts, graphs, etc.) unfamiliar content, unusual format, unfamiliar style of writing, etc.**

  **Possible wonderings: content of pictures, unusual author techniques (for example, flashback) connection to the theme, connection to other books written by the same author, etc. Wonderings help determine the purposes for reading.**

  **CPW charts should be posted where students can see them even after they've been completed.**

- Students should be directed to return to clues, problems and wonderings after reading the selection to:

  discuss clues and whether or not they were helpful.

  discuss problems and how the strategies helped solve them.

  discuss wonderings.
  (Were wonderings addressed? Were they important? How can I find our more? These questions can be addressed during the **Handing-Off Discussion.)**

## Clues Problems and Wonderings Routine Card

- **Students browse the selection before reading.**
- **Students identify and share clues, problems and wonderings as they find them in the selection.**
- **Students return to clues, problems and wonderings after reading.**
- **Students return to clues, problems and wonderings as needed during Handing-Off Discussions.**
- **CPW charts should always be posted where students can see them even after they've been completed.**

# Selection Vocabulary Procedure

## Purpose:

- To provide students with strategies for figuring out the meanings of words, which prepare them for the demands of independent reading.
- Students are encouraged to use both selection vocabulary words and interesting words they have identified during reading in discussion and writing.

## Procedure:

- Review the purpose of selection vocabulary.
- Have students review strategies by giving definitions.
- Have students **chorally** read words in the word box with teacher stopping to guide the blending of any words students have trouble reading.
- Have students read sentences **chorally** making note of any words (other than the underlined word) they don't know.
- Provide quick definitions for unknown words.
- Ask students for definitions/synonyms for the underlined words using the vocabulary strategies of context clues, word structure or apposition to figure out meanings of the words.
- Insert definition/synonym into one/both of the sentences and have students read the sentence with the substitution. Ask students if the definition/synonym is correct. If it is incorrect, prompt student to correct definition or call on another student. When the definition is correct, ask student for the strategy applied and the rationale/evidence for doing so. Write the strategy used to help define the word and underline any clues or word structures the helped define the word on the transparency.
- If after three students the desired response isn't acquired, be ready with a method of scaffolding.
- Have a volunteer create a new sentence using the underlined word.

## Clarifications:

- Both sentences should be read before attempting a definition.
- **Chorally** does not mean the whole class all of the time. You may ask groups of students to read. For example, boys, girls, row 1 etc.
- The strategy, **Think-Pair-Share**, can be used with students for discussion of word definitions. The strategy of Think-Pair-Share may not be needed for every word although it is a strategy that can be used to maximize student participation.
- The **instructional dialogue** between the teacher and students prompts students toward a correct definition.
- Scaffolding may include inserting words to clarify a definition or providing a new sentence with more clues. Some definitions may be difficult because they may not insert easily into sentences and will need minor modifications.

- Students do not have to get the **exact words** in the definition as stated in the TE, but they do have to convey the **exact meaning** (Example: gored means stabbed by horns, not just stabbed).
- Selection Vocabulary is not a writing lesson.

## Routine Card

- **Teacher review purpose.**
- **Students review strategies.**
- **Students chorally read words in word box.**
- **Students read sentences chorally making note of any words other than the underlined words they need clarified.**
- **Teacher provides quick definitions for words that need clarification.**
- **Students give definitions/synonyms for the underlines words using vocabulary strategies.**
- **Students insert the definition/synonym into the sentence and students read the sentence with the substitution.**
- **When definition is correct, students tell the strategy applied and the rationale/evidence for their definition.**
- **Students create a new sentence using the underlined vocabulary word using sentence stretching technique where applicable.**

# Reading the Selection/Strategies

## Purpose:

- To identify and practice the use of reading strategies that help students comprehend written text.
- To encourage the use of strategies in all reading.

## Procedures:

- The following lessons should precede the strategy read of the selection on Day 1 during Reading and Responding:
  - Build Background (Activate Prior Knowledge, Background Information)
  - Preview and Prepare (Browse, Clues, Problems and Wonderings, Set Purposes)
  - Selection Vocabulary
- Students should be seated at their seats or on the rug (possibility for lower grade students) with anthologies open to the selection.
- Target strategies should be highlighted by posting them on the board, clipping them (indicating they are the focus of today's lesson) etc.
- Target strategies should be defined by the students. If students are unable to define the strategies, the teacher should define them handing off to the students as they become able to state the definitions.
- The focus question(s) should be reread reminding students to think about the question(s) as they read the selection.
- Students should chorally read the title, author and illustrator.
- Students should chorally read as a whole group, or smaller groups as designated by the teacher. Smaller groups might be students in group 1, students with blue pants on, students with tennis shoes, boys, girls, etc.
- Students not chorally reading should be directed to read silently along with the readers focusing on applying the focus comprehension strategy or strategies.
- Teacher should stop at the designated number in the teachers' edition and model the use of the strategy as it appears on the left side, Comprehension Strategies, of the teachers' edition.
- Teacher should guide the students through designated pages of the selection as indicated in the Lesson Planner.
- Discuss Strategy Use after the Comprehension Strategy read.

## Clarification:

- Students can use strategies not specific to the lesson during the reading of the anthology. For example if the focus strategy is making connections and the students want to ask a question or predict, they are allow to use those additional strategies making sure to maintain the instructional focus.

# Discussion/Handing-Off

## Purpose:

- To provide a consistent sequence for discussion.
- To expose students to points of view different from their own.
- To help students learn how to express their thoughts and opinions coherently.
- To allow students to take primary responsibility for controlling the discussion.

## Procedures:

- Students are seated so they can see each other engage in a discussion. This means in a circle on the rug or student chairs positioned in a circle.
- The teacher takes a seat as a participant in the circle and as a part of the group.
- Students have their anthologies to reference throughout the discussion.
- Teacher posts the Clues, Problems, and Wonderings Chart for reference.
- Teacher sets up the procedures for handing-off discussions
- Examples:
    1. I hand off to.....
    2. Thank you _____.
- Teacher prompts the students to ask questions, answer questions and/or comment on what they have read and want to react to from the text.
- .Getting Started:
    1. Model handing-off by offering comments on the text, asking questions about the selection, the style of the writing or the connection to the unit them.
    2. Use discussion starters such as "I didn't know that..." or "This piece made me think..." or "I disagree with ____because..."
    3. Participate in the discussion by raising your hand.
    4. Seed new ideas as you participate in the discussion, for example, "As I read this selection, I was reminded of _____. What did that part remind you of?" Or, "This piece opened up a whole new way of thinking about the unit.
    5. Wait for students to respond to each other. Don't feel the need to jump in when there are a few moments of silence.
    6. Sentence frames such as, "I agree/disagree with _____because_____.", and "I also would like to say/add_____.", should be posted for student reference and use.

- Handing-off can be used periodically to check understanding of the text and concepts. This can be done at the end of the reading each day.
- Build the idea of handing-off into other classroom discussions.

## Discussion/ Handing-Off

- Students are seated so they can see each other engage in a discussion.
- Teacher takes a seat as a participant in the circle and as a part of the group.
- Students have their books and are free to refer back to any selection to make a point.
- Teacher sets expectations for handing-off discussions.
- Students take responsibility for the discussion.
- Students ask questions, comment on what they have read, and /or react to the text.
- Students choose and hand the discussion off to other students/teacher in the class.
- Getting Started:
  - Teacher models handing-off
  - Use discussion starters
  - Teacher participates in the discussion and seeds new ideas as needed
  - Wait time for student responses
- Teacher builds the idea of handing-off into classroom discussions.

# Reading the Selection/Skills

## Purpose:

- To identify and practice the use of reading skills to help students comprehend written text.
- To identify and practice the use of reading skills and apply these organizational skills to their written work.

## Procedures:

- The following lessons should precede the skills read of the selection on Day 2 or 3 during Reading and Responding:
  - Build Background (Activate Prior Knowledge, Background Information)
  - Preview and Prepare (Browse, Clues, Problems and Wonderings, Set Purposes)
  - Selection Vocabulary
  - Comprehension Strategy Read
- Teacher should prepare any charts, graphs, etc. needed for the lesson before the lesson begins.
- Students should be seated at their seats or on the rug (possibility for lower grade students) with anthologies open to the selection.
- Target skill(s) should be highlighted by posting them on the board, clipping them (indicating they are the focus of today's lesson) etc.
- Target skill(s) should be defined by the students. If students are unable to define the skill(s), the teacher should define them handing off to the students as they become able to state the definitions.
- Students should review the title, author and illustrator.
- Students should chorally read assigned portions of the selection as a whole group, or smaller groups as designated by the teacher. Smaller groups might be students in group 1, students with blue pants on, students with tennis shoes, boys, girls, etc.
- Students not chorally reading should be directed to read silently along with the readers with the same purpose or directions in mind as the assigned readers.
- Teacher should direct students to examine the text, answer questions per the Comprehension Skills directions on the right side of the page in the teachers' edition.
- Teacher should guide the students through designated pages of the selection as indicated in the Lesson Planner.
- Checking Comprehension Questions should be discussed at the conclusion of the Comprehension Skills lesson.

## Clarification:

- If students have difficulty answering questions or identifying a focus concept, students may be encouraged to reread portions of the text silently for clarity.

## Reading the Selection/Skills

- **Students should be seated at their seats or on the rug with anthologies open to the selection.**
- **Target skill(s) should be highlighted.**
- **Target skill(s) should be defined by the students.**
- **Students should review by reading the title, author and illustrator.**
- **Students should chorally read designated portions of the selection as directed by the teacher.**
- **Students not reading should be directed to read silently along with the readers with the same purpose or directions in mind.**
- **Teacher should direct students to examine the text, answer questions per the Comprehension Skills directions on the right side of the page in the teachers' edition.**
- **Teacher should guide the students through designated pages of the selection as indicated in the Lesson Planner.**
- **Checking Comprehension Questions should be discussed at the conclusion of the Skills lesson.**

# EFC Staff Survey

**(Staff members complete this document online in the Fall and Spring. There are some questions about Professional Development that change in order to provide data such as summer printing needs, response to changes during a particular cycle of inquiry, etc.)**

## 1. Default Section

### 1. Home Office tries to be receptive to teachers in order to retain the best teachers for the organization.

| | Totally disagree | Somewhat disagree | Neither agree or disagree | Somewhat agree | Totally agree |
|---|---|---|---|---|---|
| 1. I feel that the EFC salary and benefits package is competitive. | ◯ | ◯ | ◯ | ◯ | ◯ |
| 2. I feel that the Home Office is generally receptive to staff needs. | ◯ | ◯ | ◯ | ◯ | ◯ |
| 3. Home Office Communication is timely and informative. | ◯ | ◯ | ◯ | ◯ | ◯ |
| 4. Using the internet for attendance and communication is effective. | ◯ | ◯ | ◯ | ◯ | ◯ |

### 2. Please comment:

### 3. The school site administrators work diligently to maintain a well oiled machine at the sites.

| | Totally disagree | Somewhat disagree | Neither agree or disagree | Somewhat agree | Totally agree |
|---|---|---|---|---|---|
| 1. I feel that the principal is generally responsive to staff needs. | ◯ | ◯ | ◯ | ◯ | ◯ |
| 2. I feel that student supervision and discipline are effective. | ◯ | ◯ | ◯ | ◯ | ◯ |
| 3. Site communication is timely and informative. | ◯ | ◯ | ◯ | ◯ | ◯ |
| 4. There is a high degree of follow through on commitments and promises made by my administrator(s). | ◯ | ◯ | ◯ | ◯ | ◯ |
| 5. The system for getting supplies and materials functions well. | ◯ | ◯ | ◯ | ◯ | ◯ |

**4. Please comment:**

**5. EFC takes pride in its professional development and facilities maintenance.**

| | Totally disagree | Somewhat disagree | Neither agree or disagree | Somewhat agree | Totally agree |
|---|---|---|---|---|---|
| 1. I feel that the professional development continuously helps me improve my practice as a teacher. | ○ | ○ | ○ | ○ | ○ |
| 2. Coaches work effectively to support my development/performance as a teacher. | ○ | ○ | ○ | ○ | ○ |
| 3. I feel that the EFC facilities are well maintained. | ○ | ○ | ○ | ○ | ○ |

**6. PLease comment: After this comment, classified staff may skip the next two questions.**

**7. Teachers, what support do you need in implementing the EFC Fluency Action Plan (core instruction, small group instruction, practice and assessment)?**

**8. Teachers,which instructional needs in fluency do you find the most challenging to address? PLease give as much detail as possible.**

**9. I work at the following site:**

- ○ Achieve Academy
- ○ Cox Academy
- ○ World Acdemy

**10. I am a_____employee.**

- ○ Certificated (Teacher, coach,administrator,reading specialist, CEP sub, Prep Teacher)
- ○ Classified (Office staff, custodian,cafeteria worker,school service assistant, library etc)

## 2. Please tell us

Copying needs

**1. Please list items you and your grade level feel should be mass produced. We will use your input to copy what is in most demand.**

Cox Academy
Parent Survey
12-07-09
Encuesta para padres

---

Please indicate the degree to which you agree with the following
Statements about the school environment.

Por favor indique su grado de aceptación de las siguientes afirmaciones Sobre el ambiente escolar.
Circle one:
Circule uno:

| 5 | 4 | 3 | 2 | 1 |
|---|---|---|---|---|
| Strongly Agree (Muy de acuerdo) | Agree (De acuerdo) | Neutral (Neutral) | Disagree (Desacuerdo) | Strongly Disagree (Muy en desacuerdo) |

---

The school is doing a good job of teaching my child.
La escuela está haciendo un buen trabajo enseñando a mi hijo/a

**5** 4 3 2 1

The school is safe.
La escuela es segura.

5 4 3 2 1

The school is a caring and nurturing place.
La escuela es un lagar que cuida y protege a los estudiantes.

**5** 4 3 2 1

As a parent/guardian, I feel welcomed and respected at the school.
Como padre o tutor me siento respetado y bienvenido en la escuela.

**5** 4 3 2 1

The school office is well organized.
La oficina de la escuela tiene buena organización.

**5** 4 3 2 1

The school report cards provide me with useful information about what my child knows and can do.
Las tarjetas del boletín escolar me proporcionan con información útil acerca de lo que mi niño sabe y puede hacer.

**5** 4 3 2 1

Overall, what grade would you give the principal?
En general ¿que nota o calificación le daría usted a la directora de la escuela?

| A | B | C | D | F |
|---|---|---|---|---|

Comment:
Comentario:

Overall, what grade would you give the school?
En general ¿que nota o calificación le daría usted a la escuela?

| A | B | C | D | F |
|---|---|---|---|---|

Comment:
Comentario:

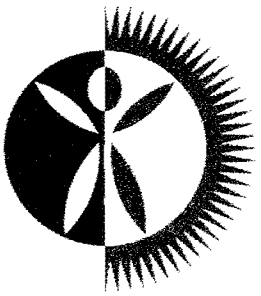
Would you recommend this school to other families?
¿Usted recomendaría esta escuela a otras familias?

| Yes/Si | No |
|---|---|

If no, why not?
¿Si no, porque no?

What do you like about your school?
¿Que le gusta de la escuela?

**Please return by Friday, December 11, 2009.**
**Haga el favor de devolver para el viernes 11 de Diciembre de 2009.**



Education *for* Change

# Text Analysis Documents

- Overview: Stages of Text Analysis
- "A Review Of What It Takes To Effectively Use the Systems of Instruction in Open Court Reading to Improve Student Comprehension and Academic Achievement: Text Analysis" by Betsy Eaves

*A Review Of What It Takes To Effectively Use The Systems Of Instruction In Open Court Reading To Improve Student Comprehension and Academic Achievement: Text Analysis*
*By Betsy Eaves*

**Two very important ideas to begin this review:**

- If students are to improve in accurately reading and understanding grade level, new and unfamiliar text, all students will need to develop the habit of reading accurately for meaning. This means that we are always working to help students to develop the ability to simultaneously decode, follow the meaning of the words and process the logic in what they are reading.
- If students are to learn to use written material as a tool for learning, then they will need to be engaged in what they perceive as important work related to reading. This needs to be work that helps them to develop skills in analysis of text, in understanding literary elements and in how reading for information and for understanding the world leads to new insights and experiences.

**About teaching and following the teacher's guide (TE):**
First, the sequence of instruction and the suggested procedures in OCR need to be followed. This means that the questions in the TE are purposeful and placed in important junctures in reading the selection. The flow of reading needs to continue until the marked places.

Second, the teacher needs to be careful to help the students to build the knowledge as they read, but the teacher needs to not overly explain at every turn. The goal is that the students will begin to read for meaning while they are accurately decoding. If the teacher is taking all the time talking about the text, then the cognitive load is taken off the student and becomes the responsibility of the teacher. However, if the teacher just has the students read with no expression (prosody) then meaning is lost. The teacher is the one who models reading for meaning by thinking aloud, checking for understanding, and explicitly teaching oral fluent reading process.

Finally, the teacher needs to personally pre-read the selection and the questions related to the strategies and the skills before the lesson. This will help guide the process as each question helps the student to get deeper into the anthology and to begin to develop ideas. If during the first read everyone is pretty much getting the meaning then the strategy questions can be quick sessions of modeling and student responding. The skills questions are bigger ideas about meaning and structure and are good examples of " blooming it up". It is not necessary to devise more questions as these are designed to begin to move from recognizing and understanding explicit writing techniques that help the reader to follow the logic of a written selection into how to use the ideas contained in the text to arrive at insights and deeper understanding of the theme connections.

In order to get to this place, where every student is a reader who can read, reflect, gain in knowledge and insight, then all of the above needs to be explicitly taught and monitored through the following actions:

***Unit Theme/ Concept Question Board***
The entire unit is a whole class inquiry into the theme. Every selection builds the class' knowledge about that theme and generates new questions.

- The Unit Opener should be used to generate interest and excitement into the theme that they will be studying for the rest of the 6-8 weeks.
    - Many of the science and social studies related themes may need specific background knowledge built during the unit opener
- Resources for the teacher:
    - Aqua Overview pages (Exploring the Theme Introduction, Investigation Goals, Learning Goals, grid with the Link to the Theme)

- These are resources for you as the teacher. This helps you know where you want to guide your students. This is the learning you want them to get from the inquiry into this theme and/or what they should learn about the theme from each selection. Do not tell them what the learnings are, guide them to those learnings.

Connect one selection to the other. Help the student to importantly connect insights gained in one selection to another so that they learn how to use specific information from their reading to develop important insights and ideas. This is the way that comprehending anthology becomes important to the reader. It is also why a student, as a learner, gains power from reading and studying a text. They gain a deeper understanding of the theme with each selection.

- The discussion on the selection and the theme needs to be ongoing, focused and it needs to begin to move the whole class into a set of shared insights (Investigation Goals, Learning Goals, Links to the Theme are your guide) based on reading the selections.
- The insights and emerging questions need to be captured on the Concept/ Question board much like you would capture the ideas and questions in an investigation.
- The Concept/Question Board is a living document of student learning. Make sure the key postings are large enough for everyone to read.
- During the Building Background section, the teacher needs to ask students about the previously read selections and what they have learned so far about the theme. The teacher should refer to the C/Q Board for any questions that might be answered in the reading of the current selection.
- Each day right before the reading/ rereading of the selection, teachers should refer to the C/Q board and previously read selections. What have we learned so far? What are our questions? Let's see what we learn today about our theme.
- The Concept/ Question board needs to be a living tool of this learning. Students need to have a part in the learning process, as their ideas need to begin to drive the discussion.
- There needs to be a record of learning that sequences the insights connected to the selections.
- Posting on the Concept/ Question Board could come as a result of a whole class discussion, small group discussion (Theme Connections) or individual responses. The postings should be about the theme or how the selection relates to the theme rather than random unrelated details about a particular selection. Refer to the TE and to the Program Appendix.

- Provide multiple scaffolds before, during, and after reading to ensure that all students are able to connect to the meaning of the text and connect meaning to the unit theme (pre-reading, vocabulary, discussions, etc.)
- Teacher modeling and thinking out loud with interest and enthusiasm is key to engaging students' interest and attention.

***Building Background***

- Use the information in the Activate Prior Knowledge and Background Information to teach students information they need to know to access the selection
- Be sure to follow the prompts in the TE to ask students what background knowledge they have. We often assume they do not know, but some might and this gives them the opportunity to share that information as part of this process as the class learns together about the theme.
    - Teachers should review the questions in the TE and the Link to the Theme (in the aqua pages) and identify the key questions in the TE that will link student learning to the theme. Teachers should plan collaboratively about how to get students to that expected understanding. The students must derive the meaning rather than the teacher giving it to them.
- Each selection needs to be approached from the idea of it adding to the student learning and insights into the theme. The Concept/ Question board needs to be the center of the initial introduction to the selection. Students need to be engaged in developing important questions before reading. Classroom

discussion needs to center on focusing student attention on how this selection might connect with previous selections.

***Preview and Prepare/ Clues, Problems and Wonderings***

- CPW should be a quick activity (approximately 7 minutes) to get students interested in
- Students can give Clues, Problems and Wonderings in any order
- Point out any interesting questions from the Concept/ Question Board that will be answered in this selection as an additional way to set purposes for the read
    - The teacher has to have read the C/Q Board ahead of time and identified any relevant questions

***Vocabulary***

- Quick and interesting vocabulary instruction using the design in OCR, is a scaffold that ensures that students are able to connect to the meaning of the text. This occurs in the Selection Vocabulary and in the suggested notes to the teacher related to the underlined words in the text.
    - The teacher should continually refer students to the sentences and the strategies as they develop their definition.
- The vocabulary needs to be used in multiple settings and illustrations of the meaning need to be provided using realia, cognates and other effective scaffolds as appropriate.
- In your grade level planning, decide if you are going to split the word list over two days or not. If you are, be sure that the words are split based on when they appear in the text and what will be read that day.

***Setting the Standard for Choral Reading***

- Students need to know:
    - We can all read each word already. However, reading sentences, paragraphs and pages is more difficult. This is because we need to understand the meaning at the same time as we read the words.
    - When we read new selections, we start by reading the text together so that we all are able to understand exactly what all of it is about.
    - We use our out loud voices to help our minds keep exact track of the meaning of what we are reading. Those voices should be as though we are reading to the book, not so loud that you can't hear anyone else and not so soft that you can't hear yourself.
    - We read like we speak.

- Tell the students your expectations and be consistent with those expectations:
    - We all read together aloud in normal voices
    - We read at the same rate that we speak
    - We read with expression
    - We use the punctuation for added meaning
    - We keep together so our voices blend into one voice
    - We read all the words on the page
    - We ask to stop when we get confused

- When you read the Read Aloud in the Unit Opener, model reading with prosody and be explicit with the students that that is how you expect them to read.

- When your voice interjects into the choral read, be sure you are modeling reading with prosody.

***Read Aloud Together with Prosody and Automaticity***

- All initial reading of the selection needs to be oral by the students in a whole group. The teacher needs to conduct multiple oral reading sessions that focus on fluent reading and rereading of the text.

- ✓ The selection needs to be read and reread orally so that students begin to be able to read the anthology themselves with fluency and expression.
- ✓ The teacher needs to direct the class to reread passages together so that meaning shows in the way the word are read.
- ✓ The teacher needs to monitor the choral read carefully so that all the students are actually reading the anthology and not mumbling or skipping words.
- ✓ The pacing of the reading sessions needs to be right on the edge of the students' skill to read and process for meaning. If the session drags, then students loose the flow of the meaning. Students should read at the pace with which they speak.
- ✓ The teacher needs to actively model fluent reading and also the thinking that is needed to figure out the text.

- Students who are low non-fluent should pre-read the text with the teacher during workshop right before the read
  - ✓ Low non-fluent students need to have a session with the teacher in pre-reading important passages to ensure that these students are able to stay connected during the whole class reading of the selection.
- Teacher modeling and thinking out loud with interest and enthusiasm is key to engaging students' interest and attention.

***Connecting the Read to the Theme***

- Use the oral reading sessions to create questions and investigations into the meaning of the text.
  - The teacher needs to help guide the students to these ideas as they are detailed in the theme connections. This guiding includes the teacher thinking aloud about connections to the theme, explicitly asking questions to promote thinking, and in marking student ideas that can become part of the follow up discussion.
  - The discussion following each day's read needs to briefly go back to key concepts and questions that were raised previously especially the ones generated by students during reading. The teacher needs to work with the students to model how the reading is adding to the thinking about the theme and what specific ideas may be better understood or reframed given the learning so far.
  - Using the handing off model to engage students in important reflection on their own learning and new thinking about the theme. Again, teacher modeling and enthusiasm is key to getting students thinking importantly as they read.

***Strategy Read***

- Read the whole selection
- Stop at numbered points in the marginalia
  - If students do not give the depth of response expected, the teacher should be prepared to guide students to that response. In grade level teams, teachers should pre-plan what the quality response should look/ sound like (refer to TE) and then discuss how you would get students there, if they do not initially respond at the agreed upon expected level. Refer to Link to the Theme (in the aqua pages) to know toward what learning you are guiding them.
- The long term goal is to have students stop when they are confused and use the strategies to help them comprehend. As readers, we ask questions and keep reading to find out the answer.
  - The teacher should not pre-digest the information for the students and interpret the text for the students.
- Emphasis on understanding what is happening in the selection
- During reading, the comprehension strategies need to engage the readers in figuring out the meaning. Emphasis needs to be on thinking as we read.
- Re-read if students are not reading accurately or with prosody
  - In collaborative planning, identify any key portions of text, then discuss how those critical portions of the text should be read (correct intonation) by students to get the meaning. If

students do not read it correctly when you read the selection, go back and re-read it as a class with the correct intonation.

***Skills Read***

- Re-read specific portions of selection based on the TE directions and anywhere where you noticed students struggling or confused during the strategy read
- Stop at the points designated in the marginalia
- Read with emphasis on writer's style and organization- how it is written
- Make explicit connection that when they are writing they can use similar style or organization.
- The teacher will need to actively work with students to ensure that all of them understand the sequence of the selection, the main ideas and the important insights related to the theme.
- If students do not give the depth of response expected, the teacher should be prepared to guide students to that response. In grade level teams, teachers should pre-plan what the quality response should look/ sound like (refer to TE) and then discuss how you would get students there, if they do not initially respond at the agreed upon expected level.

- Use repeated oral-reading sessions to examine the text for key elements of comprehension related to how the anthology uses specific words and structures to convey meaning (Skills read).
  - The pattern of subsequent reads need to follow the idea of "reading with a writer's eye" to help students to more deeply understand the text.
  - Each session needs to engage student in finding specific examples of written structure within the text.
  - The discussion needs to capture the concepts in a "T" chart where the structures in written works are explored using examples from the text.
  - The ultimate focus of this work is on understanding literary terms and structures and on using this understanding to gain farther insights into the text; the theme and ones own writing.
  - It is at this stage that important connections are made to the student's own writing and how the reader can learn skills in writing from other writers.

***Re-read selection***

- At the beginning, re-read the selection as a class on Day 5 and have a culminating discussion. You may want to chart what they have learned about the theme after reading this selection on a chart that includes all the selections.
- Once the students are successful in reading with prosody and automaticity, you can have a variable re-read which might look like:
  - Teacher re-reading with the lowest students. While others read in small groups or pairs. They would not necessarily re-read the whole selection.
  - Re-reading portions of text with a specific discussion or task to complete as a result of reading that particular portion. These always should be linked to theme.
  - Re-reading with the lowest students, while fluent students are conducting Reading Roundtable about theme related texts.
  - During Fluency Practice for specific students (see fluency action plan) and not have a Day 5 re-read. Use that time for inquiry.

***Discussions (including Handing-off, Theme Connections)***

- Classroom discussion needs to center on focusing student attention on how this selection might connect with previous selections and how what they learned connects to the theme.
  - What have we learned about the theme from this selection that we did not know before?

- Using the handing off model to engage students in important reflection on their own learning and new thinking about the theme. Again, teacher modeling and enthusiasm is key to getting students thinking importantly as they read.

***Review Concept/ Question Board for:***

- Discussions
- Inquiry Journal

***Remember!!!***

Develop an atmosphere of excitement and involvement in learning about the world from reading, discussion, analysis and the communication of important ideas.

- The purpose of the theme is to build a scaffold for the emerging scholar to delve deeper into learning from reading.
- If the theme is not embraced as interesting, alive, exciting, engaging and important, then the reader and the teacher are just going through the motions of reading and talking.
- Kids need to get excited about reading to learn something!
- This whole unit is a class inquiry into the theme

In conclusion, remember that oral reading of instructional level text (selections)* is the bridge between decoding (being able to read almost every word on the page) and comprehension (understanding in our head while we read). The oral reading sessions that the teacher conducts are critical for the emerging reader. This model is not usually what we think of when we say, " let's all read together." It is complex, and very purposeful. If the students in the class are not expected to fully participate, if the sessions are not organized to be engaging and lead to new learning then the whole idea just becomes round robin reading and all of the work of teacher and the students is lost. These sessions are in the best sense Text Study/ Inquiry sessions.

** The decodable reading sessions (grades 1-3) are not the same as the text (anthology) selection sessions. These decodable sessions are in controlled text where the student is given repeated practice in reading new words using the explicit sounds and spellings taught or reviewed in that lesson. The decodable are much more predictable and the cognitive load is much lower to allow the learner time to practice reading new spellings/ sounds within words fluently without having a complex text to master as well. However, if we mistakenly use the model for teaching a decodable text with the selection we will not be teaching student to read (decode and understand) new less predictable text. And the opposite is true. If we use the model for reading the anthology selection as the model for reading a decodable then the students will not be practicing fluent reading as they need to.*

Stages of Text Analysis

**Reading Roundtable**

Students reading leveled text in small groups, independent application of the strategies and skills

**Inquiry**

Students engaged in meaningful inquiry projects about the theme.

**Multiple Discussions**

Whole group- handing off  Small group- Theme Connections

| **Inquiry about the Theme** (p3 #5, p3-4 #7, p4 #8) | **Building Background** (p2 #4) | **Rigorous Reading** (p2 #3, 4) | **Using Data/ Preteaching** *(p2 #1,2,p3 #4)* | **Use the prompts** (p1, p3 #4, p3 #6) | **Cite the Text** (p3 #5, #6) |
|---|---|---|---|---|---|
| *What connections do you want the kids to make to the theme?<br>* How are you conveying that this theme is interesting and exciting on a daily basis?<br>* How are you charting/ recording the connections to the theme on the Concept/Question Board after each selection? How are you reviewing what they have learned about the theme before reading each selection?<br>* What questions on the CQ Board do you want to highlight at the beginning of the selection that you want students to be able to answer at the end of this selection?<br>*What questions might you need on the CQ Board to lead into the next selection? How can you lead the discussion to those questions?<br>*What are the learning goals. . . how can you manipulate the discussion to ensure that students come to those understandings?<br>*Look at Handing Off and Theme Connections questions. . . how are you going to set students up for success in those discussions?<br>*Make sure students see each selection as another source of information to help in their inquiry into the theme. | * How can Unit Openers be used to build background knowledge and key vocabulary?<br>*What information do students need to know to be able to analyze the text?<br>*How can students share prior knowledge they might already have?<br>*Are there any words that are critical to understanding the selection that need to be pre-taught?. . these should only be words that are absolutely critical to understanding the text. . . very few<br>resources: underlined words, ELSG) | What does it look like?<br>*EVERY student reading- every one<br>*Chorally reading so it sounds like one voice<br>*Prosodic reading- reading with expression, paying attention to punctuation<br>*Re-read if any of the above are problematic<br><br>Key points<br>*Listen to the reading to hear where students are struggling or confused<br>*Read a minimum of 20 minutes a day during the anthology read, including Day 5<br>*Re-read particular paragraphs that are key to understanding the selection<br>* The re-read of these selections might be followed by a short discussion. . . prompt<br><br>How can you re-read to maintain the level of interest or to create more clarity in the reading?<br>• Using different groups to read aloud (i.e., boys, girls, Team A, etc.)<br>• Read as a play (assign characters to different groups of students)<br>• Voice, intonation | *Formal Data*<br>Which students have low comprehension scores? What are their fluency scores?<br>*Informal data*<br>Who is actually reading during the choral read (vs. mumbling, mimicking the person next to them, not reading at all)?<br>Who does not participate in the strategy and skill discussions?<br><br>**Pre-teaching**<br>**Based on your data,** who needs to be pre-taught so they can access the anthology read? When? How?<br>Pre-reading, pre-teach strategies, skills, ELSG<br>If they are non-decoders, refer to non-decoder decision tree and p2 #1.<br>If they are low in fluency, refer to p2 #2 and *<br>**In Class**<br>How will you get every student reading?<br>How will you get every student participating in discussions? | Key: thinking as we read<br><br>What is the instructional sequence of the prompts for this selection?<br>What is the reasoning behind the prompts?<br>Use the prompts as they are designed.<br>*How would you use the prompt?<br>*Are you going to prompt the students first? Are you going to model first and then ask them?<br>* How would you clarify without overly explaining/ predigesting the information for the students?<br><br>When you are teaching the Skills read, use T charts or suggestions from Supporting the Reading to capture the learning (p3 #6). | Make sure the students always cite the text when they are responding.<br><br>Citing the text should not just be reading the sentence from the text, but also an explanation of why it answers the question. Have them put it in their own words. |

## Routines and Procedures

# Covering The Standards

This document Identifies the connections between the California State Content Standards and the Open Court Reading Program to ensure appropriate coverage of the Standards in the areas of Social Science and Science.

This project is being worked on by grade level committees of teachers and coaches, as well as EFC Home Office Staff

Education for Change

# Science

Key:

[redacted]

**Good Connection**

[redacted]

☆ **Taught at an earlier or later grade level (k-5)**

# Kindergarten

| Standard | Unit/Story | Corresponding Science/Social Studies Card |
|---|---|---|
| **Physical Sciences**<br>**1. Properties of materials can be observed, measured, and predicted.** | | |
| a. Students know objects can be described in terms of the materials they are made of and their physical properties. | [redacted]- S-Actual Size by Jenkins<br>S-A Star is My Orange Rau<br>**The Ocean** | [redacted] |
| b. Students know water can be a liquid or a solid and can be made to change back and forth from one form to the other. | S-The Blizzard by Wright<br>S-Hello Snow by Vestergard | [redacted] |
| c. Students know water left in an open container evaporates, but water in a closed container does not. | S-Round the Garden by Abrahms | [redacted] |
| **Life Sciences**<br>**2. Different types of plants and animals inhabit the earth.** | | |
| a. Students know how to observe and describe similarities and differences in the appearance and behavior of plants and of animals. | **A Walk by the Seashore**<br>**Humphrey the Whale**<br>[redacted] | [redacted] |
| b. Students know stories sometimes give plants and animals attributes they do not really have. | [redacted] | [redacted] |
| c. Students know how to identify major structures of common plants and animals. | **The Ocean** | [redacted] |
| **Earth Sciences**<br>**3. Earth is composed of land, air, and water.** | | |
| a. Students know characteristics of mountains, fivers, oceans, valleys, deserts, and local landforms. | [redacted] | [redacted] |

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| b. Students know changes in weather occur from day to day and over seasons, affecting Earth and its inhabitants. | **Can You See the Wind?** [redacted] | [redacted] |
| c. Students know how to identify resources from Earth that are used in everyday life, and that many resources can be conserved. | [redacted] | [redacted] |
| **Investigation and Experimentation**<br>**4. Scientific progress is made by asking meaningful questions and conducting careful investigations.** | | |
| a. Observe common objects using the five senses. | [redacted] | [redacted] |
| b. Describe the properties of common objects. | **Tillie and the Wall** | |
| c. Describe the relative position of objects using one reference. | [redacted] | [redacted] |
| d. Compare and sort common objects based on one physical attribute. | **Annabelle Swift, Kindergartner**<br>**Shadows**<br>**Bear Shadows**<br>**A Walk by the Seashore** | [redacted] |
| e. Communicate observations orally and in drawings. ☆ | | |

# Grade 1

| Standard | Selection | Corresponding Science/Social Studies Card |
|---|---|---|
| **Physical Sciences**<br>**1. Materials come in different forms including solids, liquids, and gases.** | | |
| a. Students know solids, liquids, and gases have different properties. | **Clouds, Rain, Snow, and Ice**<br>**When a Storm Comes Up** | [redacted] |
| b. Students know the properties of substances can charge when the substances are mixed, cooled, or heated. | [redacted] | [redacted] |
| **Life Sciences**<br>**2. Plants and animals meet their needs in different ways.** | | |
| a. Students know different plants and animals inhabit different kinds of environments and have external features that help them thrive in different kinds of places. | [redacted]<br>**Baby Animals**<br>**Raccoons** | [redacted] |
| b. Students know both plants and animals need water, animals need food, and plants need light. | **Spiders**<br>**Munch Crunch: The Foods That Animals Eat**<br>**Baby Animals** | [redacted] |
| c. Students know animals eat plants or other animals for food and may also use plants or even other animals for shelter and nesting. | **Spiders**<br>**Munch Crunch: The Foods That Animals Eat**<br>**Baby Animals**<br>**Raccoons** | [redacted] |
| d. Students know how to infer what animals eat from shapes of their teeth (e.g., sharp teeth: eats meat; flat teeth: eats plants). | | [redacted] |
| e. Students know roots are associated with the intake of water and soil nutrients and green leaves are associated with making food from sunlight. | S-Amazing Apples by Whitman<br>S-Leaves! By Cavendish | [redacted] |
| **Earth Sciences**<br>**3. Weather can be observed, measured, and described.** | | |
| a. Students know how to use simple tools (e.g., thermometer, wind vane) to measure weather conditions and record changes from day to day and across the seasons. | [redacted]<br>S- I Face The Wind by Cobb<br>S- Wind by Bauer | [redacted] |
| b. Students know that the weather changes from day to day but that trends in temperature or of rain (or | [redacted] | [redacted] |

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| snow) tend to be predictable during a season. | S- **And Then It Rained** by **Dragonwagon**<br>S-All **About the Weather** by Ruiz | [redacted] |
| c. Students know the sun warms the land, air, and water. | **I Call It Sky** | [redacted] |
| **Investigation and Experimentation**<br>**4. Scientific progress is made by asking meaningful questions and conducting careful investigations.** | | |
| a. Draw pictures that portray some features of the thing being described. | | [redacted] |
| b. Record observations and data with pictures, numbers, and/or written statements. | **Captain Bill Pinkney's Journey** | |
| c. Record observations on a bar graph. | Experi**ential** | [redacted] |
| d. Describe the relative position of objects by using two references. | **Experiential** | |
| e. Make new observations when discrepancies exist between two descriptions of the same object or phenomenon. ☆ | | |

# Grade 2

| Standard | Story | Corresponding Science/Social Studies Card |
|---|---|---|
| **Physical Sciences**<br>**1. The motion of objects can be observed and measured.** | | |
| a. Students know the position of an object can be described by locating it in relation to another object or to the background. | [redacted]<br>**How to Hide an Octopus and Other See Creatures** | [redacted] |
| b. Students know an object's motion can be described by recording the change in position of the object over time. ☆ | | [redacted] |
| c. Students know the way to change how something is moving is by giving it a push or a pull. The size of the change is related to the strength, or the amount of force, of the push or pull. | TBD | [redacted] |
| d. Students know tools and machines are used to apply pushes and pulls to make things move. ☆ | S-**CARS** by Levison<br>S-**Henry's** Amazing Machines by Dobbs | [redacted] |
| e. Students know objects fall to the ground unless something holds them up. | S-**On The Day You Were** Born by **Fraiser** | [redacted] |
| f. Students know magnets can be used to make objects move without being touched. | S-What Makes a Magnet by Branley | [redacted] |
| g. Students know sound is made by vibrating objects and can be described by its pitch and volume. | S-**Sound Off** by Mason | [redacted] |
| **Life Sciences**<br>**2. Plants and animals have predictable life cycles.** | | |
| a. Students know that organisms reproduce offspring of their own kind and that the offspring resemble their parents and one another. ☆ | S-**Animal Babies in Grass**lands by **Kingfisher**<br>S-**Someday a Tree** by Bunting | [redacted] |
| b. Students know the sequential stages of life cycles are different for different animals, such as butterflies, frogs, and mice. | **Butterfly House** | [redacted] |
| c. Students know many characteristics of an organism are inherited from the parents. Some characteristics are caused or influenced by the environment. | [redacted] | [redacted] |
| d. Students know there is a variation among individuals of one kind within | | [redacted] |

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| a population. | S-Two Eggs Please by Weeks<br>**The First Americans** | [redacted] |
| e. Students know light, gravity, touch, or environmental stress can affect the germination, growth, and development of plants. | **Why Did the Dinosaurs Disappear?** | |
| f. Students know flowers and fruits are associated with reproduction in plants. | [redacted]<br>S-How Do You Raise A Raisin? By Ryan | |
| **Earth Sciences**<br>**3. Earth is made of materials that have distinct properties and provide resources for human resources.** | [redacted] | |
| a. Students know how to compare the physical properties of different kinds of rocks and how that rock is composed of different combination of minerals. | **Let's Go Dinosaur Tracking?** | [redacted] |
| b. Students know smaller rocks come from the breakage and weathering of larger rocks. | **Fossils Tell of Long Ago** | [redacted] |
| c. Students know that soil is made partly from weathered rock and partly from organic materials and that soils differ in their color, texture, capacity to retain water, and ability to support the growth of many kinds of plants. | **Fossils Tell of Long Ago** | [redacted] |
| d. Students know that fossils provide evidence about the plants and animals that lived their long ago and that scientists learn about the past history of Earth by studying fossils. | [redacted]<br>**Monster Tracks** | [redacted] |
| e. Students know rock, water, plants, and soil provide many resources, including food, fuel, and building materials, that humans use. | **New Hope**<br>**The First Americans** | [redacted] |
| **Investigation and Experimentation**<br>**4. Scientific progress is made by asking meaningful questions and conducting careful investigations.** | | |
| a. Make predictions based on observed patterns and not random guessing. | **Let's Go Dinosaur Tracking!**<br>**Dinosaur Fossils**<br>**Fossils Tell of Long Ago** | [redacted] |
| b. Measure length, weight, temperature, and liquid volume with appropriate tools and express those measurements in standard metric system units. | **Let's Go Dinosaur Tracking!** | [redacted] |
| c. Compare and sort common objects according to two or more physical attributes. | **Let's Go Dinosaur Tracking!**<br>**Dinosaur Fossils**<br>**Fossils Tell of Long Ago** | [redacted] |
| d. Write or draw descriptions of a sequence of steps, events, and observations. | Experiential | [redacted] |

| ☆ | | |
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| e. Construct bar graphs to record data, using appropriately labeled areas. | | [redacted] |
| f. Use magnifiers or microscopes to observe and draw descriptions of small objects or small features of objects. | [redacted] Experiential | [redacted] |
| g. Follow oral instructions for a scientific investigation. | [redacted] Experiential | [redacted] |

| Standard | Selection | Corresponding Science/Social Studies Card |
|---|---|---|
| **Physical Science**<br>**1. Energy and matter have multiples forms and can be changed from one form to another.** | | |
| a. Students know energy comes from the Sun to Earth in the form of light. | S- Day Light, Night Light,: Where Light Come From by Branley | [redacted] |
| b. Students know sources of stored energy take many forms, such as food, fuel, and batteries. | **Kids Did It! In Business** | [redacted] |
| c. Students know machines and living things convert stored energy to motion and heat. | **Cows in the Parlor: A Visit to a Dairy Farm** | [redacted] |
| d. Students know energy can be carried from one place to another by waves, such as water waves and sound waves, by electric current, and by moving objects. | **Storm in the Night** | [redacted] |
| e. Students know matter has three forms: solid, liquid, and gas. ☆ | | [redacted] |
| f. Students know evaporation and melting are changes that occur when the objects are heated. ☆ | | [redacted] |
| g. Students know that when two or more substances are combined, a new substance may be formed with properties that are different from those of the original materials. | **Cows in the Parlor: A Visit to a Dairy Farm** | [redacted] |
| h. Students know all matter is made of small particles called atoms, too small to see with the naked eye. | | [redacted] |
| i. Students know people once thought that earth, wind, fire, and water were the basic elements that made up all matter. Science experiments show that there are more than 100 different types of atoms, which are presented on the periodic table of the elements. | **If You're Not from the Prairie** | [redacted] |
| **2. Light has a source and travels in a direction.** | | |
| a. Students know sunlight can be blocked to create shadows. | **Through Grandpa's Eyes** | [redacted] |
| b. Students know light is reflected from mirrors and other surfaces. | **Through Grandpa's Eyes** | [redacted] |
| c. Students know the color of light striking an object affects the way the object is seen. | **Through Grandpa's Eyes** | [redacted] |
| d. Students know an object is seen when light traveling from the object | **Through Grandpa's Eyes** | [redacted] |

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| enters the eye. | | |
| **Life Sciences**<br>**3. Adaptations in physical structure or behavior may improve an organism's chance for survival.** | | |
| a. Students know plants and animals have structures that serve different functions in growth, survival, and reproduction. | [redacted] | [redacted] |
| b. Students know examples of diverse life forms in different environments, such as oceans, deserts, tundra, forests, grasslands, and wetlands. ☆ | | [redacted] |
| c. Students know living things cause changes in the environment in which they live: some of these changes are detrimental to the organism or other organisms, and some are beneficial. | [redacted]<br>S-**Judy Moody Saves The World** by McDonald | [redacted] |
| d. Students know when the environment changes, some plants and animals survive and reproduce; others die or move to new locations. | [redacted] | [redacted] |
| e. Students know that some kinds of organisms that once lived on Earth have completely disappeared and that some of those resembled others that are alive today. | [redacted]<br>S-**Fossil Fish Found Alive** by Walker | [redacted] |
| **Earth Sciences**<br>**4. Objects in the sky move in regular and predictable patterns.** | | |
| a. Students know the patterns of stars stay the same, although they appear to move across the sky nightly, and different stars can be seen in different seasons. | [redacted]<br>S-Stars by Love and Drake | [redacted] |
| b. Students know the way in which the Moon's appearance changes during the four-week lunar cycle. ☆ | S-**Hello Harvest Moon** by Fletcher | [redacted] |
| c. Students know telescopes magnify the appearance of some distant objects in the sky, including the Moon and the planets. The number of stars that can be seen through telescopes is dramatically greater than the number that can be seen by the unaided eye. ☆ | **Galileo's Treasure** by Brighton | [redacted] |
| d. Students know that the Earth is one of several planets that orbit the Sun and that the Moon orbits Earth. ☆ | **Next Stop Neptune: Experiencing the Solar System** by Jenkins | [redacted] |
| e. Students know the position of the Sun in the sky changes during the | [redacted]<br>S-Sun by **Tomecek** | [redacted] |

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| course of the day and from season to season. | | |
| **Investigation and Experimentation**<br>**5. Scientific progress is made by asking meaningful questions and conducting careful investigations.** | | |
| a. Repeat observations to improve accuracy and know that the results of similar scientific investigations seldom turn out exactly the same because of differences in the things being investigated, methods being used, or uncertainty in the observation. | [redacted]<br>Experiential | [redacted] |
| b. Differentiate evidence from opinion and know that scientists do not rely on claims or conclusions unless they are backed by observations that can be confirmed. | [redacted]<br>Experiential | [redacted] |
| c. Use numerical data in describing and comparing objects, events, and measurements. | [redacted]<br>Experiential | [redacted] |
| d. Predict the outcome of a simple investigation and compare the result with the prediction. | [redacted]<br>Experiential | [redacted] |
| e. Collect data in an investigation and analyze those data to develop a logical conclusion. | [redacted]<br>Experiential | [redacted] |

# Grade 4

Students **in Grade 4 will be instructed by** Science Specialist to cover Standards **and Teachers will reinforce through the use of the OCR Social Studies Cards**

| Standard | Unit/Story | Corresponding Science/Social Studies Card |
|---|---|---|
| **Physical Sciences**<br>**1. Electricity and magnetism are related effects that have many useful applications in everyday life.** | | |
| a. Students know how to design and build simple series and parallel circuits components such as wires, batteries, and bulbs. | | [redacted] |
| b. Students know how to build a simple compass and use it to detect magnetic effects, including Earth's magnetic field. | | [redacted] |
| c. Students know electric currents produce magnetic fields and how to build a simple electromagnet. | | [redacted] |
| d. Students know the role of electromagnets in the construction of electric motors, electric generators, and simple devices such as doorbells and earphones. | | [redacted] |
| e. Students know electrically charged objects attract or repel each other. | | [redacted] |
| f. Students know magnets have two poles, labeled north and south, and like poles repel each other while unlike poles attract each other. | | [redacted] |
| g. Students know electrical energy can be converted to heat, light, and motion. ☆ | | [redacted] |
| **Life Sciences**<br>**2. All organisms need energy and matter to live and grow.** | | |
| a. Students know plants are the primary source of matter and energy entering most food chains. | | [redacted] |
| b. Students know producers and consumers (herbivores, carnivores, omnivores, and decomposers) are related in food chains and food webs, and may compete with each other for resources in an ecosystem. | [redacted]<br>**Toto** | [redacted] |
| c. Students know decomposers; including many fungi, insects, and microorganisms, recycle matter from dead plants and animals. | | [redacted] |
| **3. Living organisms depend on one another and on their** | | |

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| **environment for survival.** | | |
| a. Students know ecosystems can be characterized by their living and nonliving components. | | [redacted] |
| b. Students know that in any particular environment, some kinds of plants and animals survive well, some survive less well, and some cannot survive at all. | **Food from the 'Hood: A Garden of Hope**<br>**Arctic Explorer: The Story of Matthew Henson**<br>**McBroom and the Big Wind** | [redacted] |
| c. Students know many plants depend on animals for pollination and seed dispersal, while animals depend on plants for food and shelter. | [redacted]<br>S- **Each Living Thing by Ryder** | [redacted] |
| d. Students know most microorganisms do not cause disease and many are beneficial. | **Medicine: Past and Present**<br>**The Microscope**<br>[redacted] | [redacted] |
| **Earth Sciences**<br>**4. The properties of rocks and minerals reflect the processes that formed them.** | | |
| a. Students know how to differentiate among igneous, sedimentary, and metamorphic rocks by their properties and methods of formation (the rock cycle). | | [redacted] |
| b. Students know how to identify common rock-forming minerals and ore minerals and ore minerals by using a table of diagnostic properties. | | [redacted] |
| **5. Waves, wind, water, and ice shape and reshape the Earth's land surface.** | | |
| a. Students know some changes in the earth are due to slow processes, such as erosion, and some changes are due to rapid processes, such as landslides, volcanic eruptions, and earthquakes. ☆ | [redacted] | [redacted] |
| b. Students know natural processes, including freezing/thawing and growth of roots, cause rocks to break down into smaller pieces. ☆ | | [redacted] |
| c. Students know moving water erodes landforms, reshaping the land by taking it away from some places and depositing it as pebbles, sand, silt, and mud in other places. | [redacted] | [redacted] |
| **Investigation and Experimentation**<br>**6. Scientific progress is made by** | | |

| | | |
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| **asking meaningful questions and conducting careful investigations.** | | |
| a. Differentiate observation from inference and know that scientists' explanations come partly from how they interpret their observations. | **Mae Jemison: Space Scientist**<br>**Sewed Up His Heart**<br>**Medicine Past and Present** | [redacted] |
| b. Measure and estimate weight, length, or volume of objects. | [redacted] | [redacted] |
| c. Formulate predictions and justify predictions based on cause and effect relationships. | **Sewed Up His Heart** | [redacted] |
| d. Conduct multiple trials to test a prediction and draw conclusions about the relationships between results and predictions. | **Emily's Hands-On Science Experiment** | [redacted] |
| e. Construct and interpret graphs from measurements. | [redacted] | [redacted] |
| f. Follow a set of written instructions for a scientific investigation. | [redacted] | [redacted] |

# Grade 5

Students in Grade 5 will be instructed by Science Specialist to cover Standards and Teachers will reinforce through the use of the OCR Social Studies Cards

| Standard | Story | Corresponding Science/Social Studies Card |
|---|---|---|
| **Physical Science**<br>**1. Elements and their combinations account for all the varied types of matter in the world.** | | |
| a. Students know that during chemical reactions, the atoms in the reactants rearrange to form products with different properties. | | [redacted] |
| b. Students know all matter is made of atoms, which may combine to form molecules. | | [redacted] |
| c. Students know metals have properties in common, such as electrical and thermal conductivity. Some metals, such as aluminum, iron, nickel, copper, silver, gold, are pure elements; others, such as steel and brass, are composed of a combination of elemental metals. | | [redacted] |
| d. Students know that each element is made of one kind of atom and that the elements are organized in the periodic table by their chemical properties. | | [redacted] |
| e. Students know scientists have developed instruments that can create discrete images of atoms and molecules that show that the atoms and molecules often occur in well-ordered arrays. | | [redacted] |
| f. Students know differences in chemical and physical properties of substances are used to separate mixtures and identify compounds. | | [redacted] |
| g. Students know properties of solid, liquid, and gaseous substances, such as sugar, water, helium, oxygen, nitrogen, and carbon dioxide. | | [redacted] |
| h. Students know living organisms and most materials are composed of just a few elements. | | [redacted] |
| i. Students know the common properties of salts, such as sodium chloride. | | [redacted] |
| **Life Sciences** | | |

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| **2. Plants and animals have structures for respiration, digestion, waste disposal, and transport of materials.** | | |
| a. Students know many multicellular organisms have specialized structures to support the transport of materials. | [redacted] | [redacted] |
| b. Students know how blood circulates through the heart chambers, lungs, and body and how carbon dioxide and oxygen are exchanged in the lungs and tissues. | **Medicine: Past and Present** | [redacted] |
| c. Students know the sequential steps of digestion and the roles of teeth and the mouth, esophagus, stomach, small intestine, large intestine, and colon in the function of the digestive system. | | [redacted] |
| d. Students know the role of the kidney in removing cellular waste from blood and converting it into urine, which is stored in the bladder. | | [redacted] |
| e. Students know how sugar, water, and minerals are transported in a vascular plant. | | [redacted] |
| f. Students know plants use carbon dioxide and energy from sunlight to build molecules of sugar and release oxygen. | | [redacted] |
| g. Students know plant and animal cells break down sugar to obtain energy, a process resulting in carbon dioxide and water. | | [redacted] |
| **Earth Sciences**<br>**3. Water on Earth moves between the oceans and land through the processes of evaporation and condensation.** | | |
| a. Students know most of Earth's water is present as salt water in the oceans, which cover most of Earth's surface. | [redacted] | [redacted] |
| b. Students know when liquid water evaporates, it turns into water vapor in the air and can reappear as a liquid when cooled or as a solid if cooled below the freezing point of water. | [redacted] | [redacted] |
| c. Students know water vapor in the air moves from one place to another and can form fog or clouds, which are tiny droplets of water or ice, and can fall to the Earth as rain, hail, sleet, or snow. | [redacted] | [redacted] |
| d. Students know the amount of fresh water located in rivers, lakes, underground sources, and glaciers is limited and that its availability can | [redacted] | [redacted] |

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| be extended by recycling and decreasing the use of water. | | |
| e. Students know the origin of water used by their local communities. | [redacted] | [redacted] |
| **4.Energy from the Sun heats Earth unevenly, causing air movements that result in changing weather patterns.** | | |
| a. Students know uneven heating of Earth causes air movements (convection currents). | [redacted] | [redacted] |
| b. Students know the influence that the ocean has on the weather and the role that the water cycle plays in weather patterns. | [redacted] | [redacted] |
| c. Students know the causes and effects of different types of severe weather. | [redacted] | [redacted] |
| d. Students know how to use weather maps and data to predict local weather and know that weather forecasts depend on many variables. | [redacted] | [redacted] |
| e. Students know that the Earth's atmosphere exerts a pressure that decreases with distance above Earth's surface and that at any point it exerts this pressure equally in all directions. | [redacted] | [redacted] |
| **5. The solar system consists of planets and other bodies that orbit the Sun in predictable paths. As a basis for understanding this concept:** | | |
| a. Students know the Sun, an average star, is the central and largest body in the solar system and is composed primarily of hydrogen and helium. | [redacted] | [redacted] |
| b. Students know the solar system includes the planet Earth, the Moon, the Sun, eight other planets and their satellites, and smaller objects, such as asteroids and comets. | **Galileo** | [redacted] |
| c. Students know the path of a planet around the Sun is due to the gravitational attraction between the Sun and the planet. | **Galileo** | [redacted] |
| **Investigation and Experimentation**<br>**6. Scientific progress is made by asking meaningful questions and conducting careful investigations. As a basis for understanding this concept and addressing the content in the other three strands, students should develop their own questions and perform investigations. Students will:** | | |
| a. Classify objects (e.g., rocks, plants, leaves) in accordance with appropriate criteria. | [redacted] | [redacted] |

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| b. Develop a testable question. ☆ | | [redacted] |
| c. Plan and conduct a simple investigation based on a student-developed question and write instructions others can follow to carry out the procedure. | | [redacted] |
| d. Identify the dependent and controlled variables in an investigation. | [redacted] | [redacted] |
| e. Identify a single independent variable in a scientific investigation and explain how this variable can be used to collect information to answer a question about the results of the experiment. | | [redacted] |
| f. Select appropriate tools (e.g., thermometers, meter sticks, balances, and graduated cylinders) and make quantitative observations. | | [redacted] |
| g. Record data by using appropriate graphic representations (including charts, graphs, and labeled diagrams) and make inferences based on those data. | [redacted] | [redacted] |
| h. Draw conclusions from scientific evidence and indicate whether further information is needed to support a specific conclusion. ☆ | | [redacted] |
| i. Write a report of an investigation that includes conducting tests, collecting data or examining evidence, and drawing conclusions. ☆ | | [redacted] |

# Social Studies

Key:

[redacted]

**Good Connection**

[redacted]

☆ Taught at an earlier or later grade level (k-5)

## Grade: K

| Standard | Story | Corresponding Science/Social Studies Card |
|---|---|---|
| **Learning and Working Now and Long Ago**<br>**K.1 Students understand that being a good citizen involves acting in certain ways.** | | |
| 1. Follow rules, such as sharing and taking turns, and know the consequences of breaking them. | [redacted] | [redacted] |
| 2. Learn examples of honesty, courage, determination, individual responsibility, and patriotism in American and world history from stories and folklore. | **A Flag for Our Country**<br>**Patriotism**<br>**Hats Off for the Fourth of July**<br>**The American Wei** | [redacted] |
| 3. Know beliefs and related behaviors of characters in stories from times past and understand the consequences of the characters' actions. ☆ | | [redacted] |
| **K. 2 Students recognize national and state symbols and icons such as the national and state flags, the bald eagle, and the Statue of Liberty.** | [redacted] | [redacted] |
| **K.3 Students match simple descriptions of work that people do and the names of related jobs at the school, in the local community, and from historical accounts.** | **Chrysanthemum**<br>**Boomer Goes the School** | [redacted] |
| **K. 4 Students compare and contrast the locations of people, places, and environments and describe their characteristics.** | | |
| 1. Determine the relative locations of objects using the terms near/far, left/right, and behind/in front. | | [redacted] |

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| 2. Distinguish between land and water on maps and globes and locate general areas referenced in historical legends and stories. | **A Walk by the Seashore**<br>**The Ocean** | [redacted] |
| 3. Identify traffic symbols and map symbols (e.g., those for land, water, roads, cities). | | [redacted] |
| 4. Construct maps and models of neighborhoods, incorporating such structures as police and fire stations, airports, banks, hospitals, supermarkets, harbors, schools, homes, places of worship, and transportation lines. | | [redacted] |
| 5. Demonstrate familiarity with the school's layout, environs, and the jobs people do there. | **Annabelle Swift, Kindergartner**<br>**Boomer goes to School** | [redacted] |
| **K. 5 Students put events in temporal order using a calendar, placing days, weeks, and months in proper order.** | [redacted]<br>S-Calendar during math meeting | [redacted] |
| **K.6 Students understand that history relates to events, people, and places of other times.** | **A Flag for Our Country**<br>**Patriotism**<br>**Hats Off for the Fourth of July** | |
| 1. Identify the purposes of, and the people and events honored in, commemorative holidays, including the human struggles that were the basis for the events (e.g., Thanksgiving, Independence Day, Washington's and Lincoln's Birthdays, Martin Luther King Jr. Day, Memorial Day, Labor Day, Columbus Day, Veterans Day). | [redacted] | [redacted] |
| 2. Know the triumphs in American legends and historical accounts through the stories of such people as Pocahontas, George Washington, Booker T. Washington, Daniel Boone, and Benjamin Franklin. | [redacted] | [redacted] |
| 3. Understand how people lived in earlier times and how their lives would be different today (e.g., getting water from a well, growing food, making clothing, having fun, forming organizations, living by rules and laws). | **Mr. McGill Goes to Town** | [redacted] |

# Grade: 1

| Standard | Story | Corresponding Science/Social Studies Card |
|---|---|---|
| **A Child's Place in Time and Space**<br>**1.11.1 Students describe the rights and individual responsibilities of citizenship.** | | |
| 1. Understand the rule-making process in a direct democracy (everyone votes on the rules) and in a representative democracy (an elected group of people makes the rules), giving examples of both systems in their classroom, school, and community. | | [redacted] |
| 2. Understand the elements of fair play and good sportsmanship, respect for the rights and opinions of others, and respect for rules by which we live, including the meaning of the "Golden Rule." | **Matthew and Tilly**<br>**The Big Team Relay Race** | [redacted] |
| **1.2 Students compare and contrast the absolute and relative locations of places and people and describe the physical and/ or human characteristics of places.** | | |
| 1. Locate on maps and globes their local community, California, the United States, the seven continents, and the four oceans. | | [redacted] |
| 2. Compare the information that can be derived from a three-dimensional model to the information that can be derived from a picture of the same location. | | [redacted] |
| 3. Construct a simple map, using cardinal directions and map symbols. | **Me On the Map** | [redacted] |
| 4. Describe how location, weather, and physical environment affect the way people live, including the effects on their food, clothing, shelter, transportation, and recreation. | [redacted]<br>**When a Storm Comes Up**<br>**How's The Weather**<br>**A Good Day For Kites**<br>**Snow is Good** | [redacted] |
| **1.3 Students know and understand the symbols, icons, and traditions of the United States that provide continuity and a sense of community across time.** | | |

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| 1. Recite the Pledge of Allegiance and sing songs that express American ideals (e.g., "America"). ☆ | | [redacted] |
| 2. Understand the significance of our national holidays and the heroism and achievements of the people associated with them. | **The Special Day** | [redacted] |
| 3. Identify American symbols, landmarks, and essential documents, such as the flag, bald eagle, Statue of Liberty, U.S. Constitution, and Declaration of Independence, and know the people and events associated with them. | [redacted]<br>**Our Class Trip** | [redacted] |
| **1.4 Students compare and contrast everyday life in different times and places around the world and recognize that some aspects of people, places, and things change over time while others stay the same.** | | |
| 1. Examine the structure of schools and communities in the past. | [redacted] | [redacted] |
| 2. Study transportation methods of earlier days. | **Song of the Train**<br>[redacted] | [redacted] |
| 3. Recognize similarities and differences of earlier generations in such areas as work (inside and outside the home), dress, manners, stories, games, and festivals, drawing from biographies, oral histories, and folklore. | | |
| **1.5 Students describe the human characteristics of familiar places and the varied backgrounds of American citizens and residents in those places.** | | |
| 1. Recognize the ways in which they are all part of the same community, sharing principles, goals, and traditions despite their varied ancestry; the forms of diversity in their school and community; and the benefits and challenges of a diverse population. | [redacted] | [redacted] |
| 2. Understand the ways in which American Indians and immigrants have helped define Californian and American culture. | [redacted] | [redacted] |
| 3. Compare the beliefs, customs, ceremonies, traditions, and social practices of the varied cultures, drawing from folklore. | [redacted] | [redacted] |
| **1.6 Students understand basic economic concepts and the role of individual choice in a free-market economy.** | | |

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| 1. Understand the concept of exchange and the use of money to purchase goods and services. ☆ | | [redacted] |
| 2. Identify the specialized work that people do to manufacture, transport, and market goods and services and the contributions of those who work in the home. | [redacted] | [redacted] |

# Grade: 2

| Standard | Story | Corresponding Science/Social Studies Card |
|---|---|---|
| **People Who Make a Difference**<br>**2.1 Students differentiate between things that happened long ago and things that happened yesterday.** | | |
| 1. Trace the history of a family through the use of primary and secondary sources, including artifacts, photographs, interviews, and documents. ☆ | | [redacted] |
| 2. Compare and contrast their daily lives with those of their parents, grandparents, and/or guardians. | [redacted] | [redacted] |
| 3. Place important events in their lives in the order in which they occurred (e.g., on a time line or storyboard). ☆ | | |
| **2.2 Students demonstrate map skills by describing the absolute and relative locations of people, places, and environments.** | | |
| 1. Locate on a simple letter-number grid system the specific locations and geographic features in their neighborhood or community (e.g., map of the classroom, the school). | | [redacted] |
| 2. Label from memory a simple map of the North American continent, including the countries, oceans, Great Lakes, major rivers, and mountain ranges. Identify the essential map elements: title, legend, directional indicator, scale, and date. | | [redacted] |
| 3. Locate on a map where their ancestors live(d), telling when the family moved to the local community and how and why they made the trip. | | [redacted] |
| 4. Compare and contrast basic land use in urban, suburban, and rural environments in California. | | [redacted] |
| **2.3 Students explain governmental institutions and practices in the United States and other countries.** | | |

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| 1. Explain how the United States and other countries make laws, carry out laws, determine whether laws have been violated, and punish wrongdoers. | **A Picture Book of Martin Luther King, Jr.** | [redacted] |
| 2. Describe the ways in which groups and nations interact with one another to try to resolve problems in such areas as trade, cultural contacts, treaties, diplomacy, and military force. | **A Picture Book of Martin Luther King, Jr.**<br>**A Place Called Freedom** | [redacted] |
| **2.4 Students understand basic economic concepts and their individual roles in the economy and demonstrate basic economic reasoning skills.** | | |
| 1. Describe food production and consumption long ago and today, including the roles of farmers, processors, distributors, weather, and land and water resources. | **The First Americans**<br>**New Hope** | [redacted] |
| 2. Understand the role and interdependence of buyers (consumers) and sellers (producers) of goods and services. | | [redacted] |
| 3. Understand how limits on resources affect production and consumption (what to produce and what to consume). | [redacted] | [redacted] |
| **2.5 Students understand the importance of individual action and character and explain how heroes from long ago and the recent past have made a difference in others' lives (e.g., from biographies of Abraham Lincoln, Louis Pasteur, Sitting Bull, George Washington Carver, Marie Curie, Albert Einstein, Golda Meir, Jackie Robinson, Sally Ride).** | [redacted] | [redacted] |

# Grade: 3

| Standard | Story | Corresponding Science/Social Studies Card |
|---|---|---|
| **Continuity and Change**<br>**3.1 Students describe the physical and human geography and use maps, tables, graphs, photographs, and charts to organize information about people, places, and environments in a spatial context.** | | |
| 1. Identify geographical features in their local region (e.g., deserts, mountains, valleys, hills, coastal areas, oceans, lakes). | [redacted] | [redacted] |
| 2. Trace the ways in which people have used the resources of the local region and modified the physical environment (e.g., a dam constructed upstream changed a river or coastline). | **Century Farm: One Hundred Years on a Family Farm** | [redacted] |
| **3.2 Students describe the American Indian nations in their local region long ago and in the recent past.** | | |
| 1. Describe national identities, religious beliefs, customs, and various folklore traditions. | [redacted] | [redacted] |
| 2. Discuss the ways in which physical geography, including climate, influenced how the local Indian nations adapted to their natural environment (e.g., how they obtained food, clothing, tools). | **Carving the Pole** | [redacted] |
| 3. Describe the economy and systems of government, particularly those with tribal constitutions, and their relationship to federal and state governments. | [redacted] | [redacted] |
| 4. Discuss the interaction of new settlers with the already established Indians of the region. | [redacted] | [redacted] |
| **3.3 Students draw from historical and community resources to organize the sequence of local historical events and describe how each period of settlement left its mark on the land.** | | |
| 1. Research the explorers who visited here, the newcomers who | **Johnny Appleseed** | [redacted] |

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| settled here, and the people who continue to come to the region, including their cultural and religious traditions and contributions. | | |
| 2. Describe the economies established by settlers and their influence on the present-day economy, with emphasis on the importance of private property and entrepreneurship. | **Uncle Jed's Barbershop** | [redacted] |
| 3. Trace why their community was established, how individuals and families contributed to its founding and development, and how the community has changed over time, drawing on maps, photographs, oral histories, letters, newspapers, and other primary sources. | [redacted] | [redacted] |
| **3.4 Students understand the role of rules and laws in our daily lives and the basic structure of the U.S. government.** | | |
| 1. Determine the reasons for rules, laws, and the U.S. Constitution; the role of citizenship in the promotion of rules and laws; and the consequences for people who violate rules and laws. | [redacted] | [redacted] |
| 2. Discuss the importance of public virtue and the role of citizens, including how to participate in a classroom, in the community, and in civic life. | **Angel Child, Dragon Child** | [redacted] |
| 3. Know the histories of important local and national landmarks, symbols, and essential documents that create a sense of community among citizens and exemplify cherished ideals (e.g., the U.S. flag, the bald eagle, the Statue of Liberty, the U.S. Constitution, the Declaration of Independence, the U.S. Capitol). | **The Go-Around Dollar** | [redacted] |
| 4. Understand the three branches of government, with an emphasis on local government. | [redacted] | [redacted] |
| 5. Describe the ways in which California, the other states, and sovereign American Indian tribes contribute to the making of our nation and participate in the federal system of government. | [redacted] | [redacted] |
| 6. Describe the lives of American heroes who took risks to secure our freedoms (e.g., Anne Hutchinson, Benjamin Franklin, Thomas Jefferson, Abraham Lincoln, Frederick Douglass, Harriet Tubman, Martin Luther King, Jr.). | | [redacted] |

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| **3.5 Students demonstrate basic economic reasoning skills and an understanding of the economy of the local region.** | | |
| 1. Describe the ways in which local producers have used and are using natural resources, human resources, and capital resources to produce goods and services in the past and the present. ☆ | | [redacted] |
| 2. Understand that some goods are made locally, some elsewhere in the United States, and some abroad. | [redacted] | [redacted] |
| 3. Understand that individual economic choices involve trade-offs and the evaluation of benefits and costs. | [redacted] | [redacted] |
| 4. Discuss the relationship of students' "work" in school and their personal human capital. | [redacted] | [redacted] |

# Grade: 4

| Standard | Story | Corresponding Science/Social Studies Card |
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| **4.1 Students demonstrate an understanding of the physical and human geographic features that define places and regions in California.** | | |
| 1. Explain and use the coordinate grid system of latitude and longitude to determine the absolute locations of places in California and on Earth. | | [redacted] |
| 2. Distinguish between the North and South Poles; the equator and the prime meridian; the tropics; and the hemispheres, using coordinates to plot locations. | | [redacted] |
| 3. Identify the state capital and describe the various regions of California, including how their characteristics and physical environments (e.g., water, landforms, vegetation, climate) affect human activity. | | [redacted] |
| 4. Identify the locations of the Pacific Ocean, rivers, valleys, and mountain passes and explain their effects on the growth of towns. | **Going West** | [redacted] |
| 5. Use maps, charts, and pictures to describe how communities in California vary in land use, vegetation, wildlife, climate, population density, architecture, services, and transportation. | | [redacted] |
| **4.2 Students describe the social, political, cultural, and economic life and interactions among people of California from the pre-Columbian societies to the Spanish mission and Mexican rancho periods.** | | |
| 1. Discuss the major nations of California Indians, including their geographic distribution, economic activities, legends, and religious beliefs; and describe how they depended on, adapted to, and modified the physical environment by cultivation of land and use of sea resources. | | [redacted] |
| 2. Identify the early land and sea routes to, and European settlements in, California with a focus on the exploration of the North Pacific (e.g., by Captain James Cook, Vitus Bering, Juan Cabrillo), noting especially the | [redacted] | [redacted] |

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| importance of mountains, deserts, ocean currents, and wind patterns. | | |
| 3. Describe the Spanish exploration and colonization of California, including the relationships among soldiers, missionaries, and Indians (e.g., Juan Crespi, Junipero Serra, Gaspar de Portola). | | [redacted] |
| 4. Describe the mapping of, geographic basis of, and economic factors in the placement and function of the Spanish missions; and understand how the mission system expanded the influence of Spain and Catholicism throughout New Spain and Latin America. | | [redacted] |
| 5. Describe the daily lives of the people, native and nonnative, who occupied the presidios, missions, ranchos, and pueblos. | | [redacted] |
| 6. Discuss the role of the Franciscans in changing the economy of California from a hunter-gatherer economy to an agricultural economy. | | [redacted] |
| 7. Describe the effects of the Mexican War for Independence on Alta California, including its effects on the territorial boundaries of North America. | | [redacted] |
| 8. Discuss the period of Mexican rule in California and its attributes, including land grants, secularization of the missions, and the rise of the rancho economy. | | [redacted] |
| **4.3 Students explain the economic, social, and political life in California from the establishment of the Bear Flag Republic through the Mexican-American War, the Gold Rush, and the granting of statehood.** | | |
| 1. Identify the locations of Mexican settlements in California and those of other settlements, including Fort Ross and Sutter's Fort. | | [redacted] |
| 2. Compare how and why people traveled to California and the routes they traveled (e.g., James Beckwourth, John Bidwell, John C. Fremont, Pio Pico). | [redacted]<br>**Going West**<br>**The California Gold Rush** | [redacted] |
| 3. Analyze the effects of the Gold Rush on settlements, daily life, politics, and the physical environment (e.g., using biographies of John Sutter, Mariano Guadalupe Vallejo, Louise Clapp). | [redacted] | [redacted] |

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| 4. Study the lives of women who helped build early California (e.g., Biddy Mason). | | |
| 5. Discuss how California became a state and how its new government differed from those during the Spanish and Mexican periods. | | |
| **4.4 Students explain how California became an agricultural and industrial power, tracing the transformation of the California economy and its political and cultural development since the 1850s.** | | |
| 1. Understand the story and lasting influence of the Pony Express, Overland Mail Service, Western Union, and the building of the transcontinental railroad, including the contributions of Chinese workers to its construction. | | |
| 2. Explain how the Gold Rush transformed the economy of California, including the types of products produced and consumed, changes in towns (e.g., Sacramento, San Francisco), and economic conflicts between diverse groups of people. | | |
| 3. Discuss immigration and migration to California between 1850 and 1900, including the diverse composition of those who came; the countries of origin and their relative locations; and conflicts and accords among the diverse groups (e.g., the 1882 Chinese Exclusion Act). | **The Golden Spike** | |
| 4. Describe rapid American immigration, internal migration, settlement, and the growth of towns and cities (e.g., Los Angeles). | **The Golden Spike** | |
| 5. Discuss the effects of the Great Depression, the Dust Bowl, and World War II on California. | | |
| 6. Describe the development and locations of new industries since the nineteenth century, such as the aerospace industry, electronics industry, large-scale commercial agriculture and irrigation projects, the oil and automobile industries, communications and defense | | |

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| industries, and important trade links with the Pacific Basin. | | |
| 7. Trace the evolution of California's water system into a network of dams, aqueducts, and reservoirs. | | [redacted] |
| 8. Describe the history and development of California's public education system, including universities and community colleges. | | [redacted] |
| 9. Analyze the impact of twentieth-century Californians on the nation's artistic and cultural development, including the rise of the entertainment industry (e.g., Louis B. Meyer, Walt Disney, John Steinbeck, Ansel Adams, Dorothea Lange, John Wayne). | | [redacted] |
| **4.5 Students understand the structures, functions, and powers of the local, state, and federal governments as described in the U.S. Constitution.** | | |
| 1. Discuss what the U.S. Constitution is and why it is important (i.e., a written document that defines the structure and purpose of the U.S. government and describes the shared powers of federal, state, and local governments). ☆ | | [redacted] |
| 2. Understand the purpose of the California Constitution, its key principles, and its relationship to the U.S. Constitution. | | [redacted] |
| 3. Describe the similarities (e.g., written documents, rule of law, consent of the governed, three separate branches) and differences (e.g., scope of jurisdiction, limits on government powers, use of the military) among federal, state, and local governments. ☆ | | [redacted] |
| 4. Explain the structures and functions of state governments, including the roles and responsibilities of their elected officials. | | [redacted] |
| 5. Describe the components of California's governance structure (e.g., cities and towns, Indian rancherias and reservations, counties, school districts). | | [redacted] |

# Grade: 5

| Standard | Story | Corresponding Science/Social Studies Card |
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| **5.1 Students describe the major pre-Columbian settlements, including the cliff dwellers and pueblo people of the desert southwest, the American Indians of the Pacific Northwest, the nomadic nations of the Great Plains, and the woodland peoples east of the Mississippi River.** | | |
| 1. Describe how geography and climate influenced the way various nations lived and adjusted to the natural environment, including locations of villages, the distinct structures | **Circles, Squares, and Daggers** [redacted] | [redacted] |
| 2. Describe their varied customs and folklore traditions. | [redacted] **Circles, Squares, and Daggers** [redacted] | [redacted] |
| 3.Explain their varied economies and systems of government. | | [redacted] |
| **5.2 Students trace the routes of early explorers and describe the early explorations of the Americas.** | | |
| 1. Describe the entrepreneurial characteristics of early explorers (e.g., Christopher Columbus, Francisco Vásquez de Coronado) and the technological developments that made sea exploration by latitude and longitude possible (e.g., compass, sextant, astrolabe, seaworthy ships, chronometers, gunpowder). | | [redacted] |
| 2. Explain the aims, obstacles, and accomplishments of the explorers, sponsors, and leaders of key European expeditions and the reasons Europeans chose to explore and colonize the world (e.g., the Spanish Reconquista, the Protestant Reformation, the Counter Reformation). | [redacted] | [redacted] |
| 3. Trace the routes of the major land explorers of the United States, the distances traveled by explorers, and the Atlantic trade routes that linked Africa, the West Indies, the British | | [redacted] |

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| colonies, and Europe. | | |
| 4. Locate on maps of North and South America land claimed by Spain, France, England, Portugal, the Netherlands, Sweden, and Russia. | [redacted] | [redacted] |
| **5.3Students describe the cooperation and conflict that existed among the American Indians and between the Indian nations and the new settlers.** | | |
| 1. Describe the competition among the English, French, Spanish, Dutch, and Indian nations for control of North America. | | [redacted] |
| 2. Describe the cooperation that existed between the colonists and Indians during the 1600s and 1700s (e.g., in agriculture, the fur trade, military alliances, treaties, cultural interchanges). | [redacted] | [redacted] |
| 3. Examine the conflicts before the Revolutionary War (e.g., the Pequot and King Philip's Wars in New England, the Powhatan Wars in Virginia, the French and Indian War). | **...If You Lived at the Time of the American Revolution** [redacted] | [redacted] |
| 4. Discuss the role of broken treaties and massacres and the factors that led to the Indians defeat, including the resistance of Indian nations to encroachments and assimilation (e.g., the story of the Trail of Tears). | [redacted] **The Coming of the Long Knives** | [redacted] |
| 5. Describe the internecine Indian conflicts, including the competing claims for control of lands (e.g., actions of the Iroquois, Huron, Lakota [Sioux]). | | [redacted] |
| 6. Explain the influence and achievements of significant leaders of the time (e.g., John Marshall, Andrew Jackson, Chief Tecumseh, Chief Logan, Chief John Ross, and Sequoyah). | [redacted] **...If You Lived at the Time of The Revolution** | [redacted] |
| **5.4 Students understand the political, religious, social, and economic institutions that evolved in the colonial era.** | | |
| 1. Understand the influence of location and physical setting on the founding of the original 13 colonies, and identify on a map the locations of the colonies and of the American Indian nations already inhabiting these areas. | **...If You Lived at the Time of the American Revolution** | [redacted] |

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| 2.Identify the major individuals and groups responsible for the founding of the various colonies and the reasons for their founding (e.g., John Smith, Virginia; Roger Williams, Rhode Island; William Penn, Pennsylvania; Lord Baltimore, Maryland; William Bradford, Plymouth; John Winthrop, Massachusetts). | **...If You Lived at the Time of the American Revolution** | [redacted] |
| 3. Describe the religious aspects of the earliest colonies (e.g., Puritanism in Massachusetts, Anglicanism in Virginia, Catholicism in Maryland, Quakerism in Pennsylvania). | | [redacted] |
| 4. Identify the significance and leaders of the First Great Awakening, which marked a shift in religious ideas, practices, and allegiances in the colonial period, the growth of religious toleration, and free exercise of religion. | | [redacted] |
| 5. Understand how the British colonial period created the basis for the development of political self-government and a free-market economic system and the differences between the British, Spanish, and French colonial systems. | **...If You Lived at the Time of the American Revolution**<br>**Shh! We're Writing the Constitution** | [redacted] |
| 6. Describe the introduction of slavery into America, the responses of slave families to their condition, the ongoing struggle between proponents and opponents of slavery, and the gradual institutionalization of slavery in the South. | **The Declaration of Independence** | [redacted] |
| 7. Explain the early democratic ideas and practices that emerged during the colonial period, including the significance of representative assemblies and town meetings. | [redacted]<br>**...If You Lived at the Time of the American Revolution** | [redacted] |
| **5.5 Students explain the causes of the American Revolution** | | |
| 1. Understand how political, religious, and economic ideas and interests brought about the Revolution (e.g., resistance to imperial policy, the Stamp Act, the Townsend Acts, taxes on tea, | **...If You Lived at the Time of the American Revolution**<br>[redacted] | [redacted] |

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| Coercive Acts). | | |
| 2. Know the significance of the first and second Continental Congresses and of the Committees of Correspondence. | **Shh! We're Writing the Constitution** | [redacted] |
| 3. Understand the people and events associated with the drafting and signing of the Declaration of Independence and the document's significance, including the key political concepts it embodies, the origins of those concepts, and its role in severing ties with Great Britain. | [redacted] | [redacted] |
| 4. Describe the views, lives, and impact of key individuals during this period (e.g., King George III, Patrick Henry, Thomas Jefferson, George Washington, Benjamin Franklin, John Adams). | [redacted] | [redacted] |
| **5.6 Students understand the course and consequences of the American Revolution.** | | |
| 1. Identify and map the major military battles, campaigns, and turning points of the Revolutionary War, the roles of the American and British leaders, and the Indian leaders' alliances on both sides. | **The Master Spy of Yorktown** [redacted] | [redacted] |
| 2.Describe the contributions of France and other nations and of individuals to the outcome of the Revolution (e.g., Benjamin Franklin's negotiations with the French, the French navy, the Treaty of Paris, The Netherlands, Russia, the Marquis Marie Joseph de Lafayette, Tadeusz Ko´sciuszko, Baron Friedrich Wilhelm von Steuben). | **The Master Spy of Yorktown** | [redacted] |
| 3. Identify the different roles women played during the Revolution (e.g., Abigail Adams, Martha Washington, Molly Pitcher, Phillis Wheatley, Mercy Otis Warren). | **...If You Lived at the Time of the American Revolution** | [redacted] |
| 4. Understand the personal impact and economic hardship of the war on families, problems of financing the war, wartime inflation, and laws against hoarding goods and materials and profiteering. | **...If You Lived at the Time of the American Revolution** | [redacted] |

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| 5. Explain how state constitutions that were established after 1776 embodied the ideals of the American Revolution and helped serve as models for the U.S. Constitution. | **Shh! We're Writing the Constitution** | [redacted] |
| 6. Demonstrate knowledge of the significance of land policies developed under the Continental Congress (e.g., sale of western lands, the Northwest Ordinance of 1787) and those policies' impact on American Indians' land. | **Shh! We're Writing the Constitution** | [redacted] |
| 7. Understand how the ideals set forth in the Declaration of Independence changed the way people viewed slavery. | [redacted] | [redacted] |
| **5.7Students describe the people and events associated with the development of the U.S. Constitution and analyze the Constitution's significance as the foundation of the American republic.** | | |
| 1. List the shortcomings of the Articles of Confederation as set forth by their critics. | **Shh! We're Writing the Constitution** | [redacted] |
| 2. Explain the significance of the new Constitution of 1787, including the struggles over its ratification and the reasons for the addition of the Bill of Rights. | [redacted] | [redacted] |

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| 3. Understand the fundamental principles of American constitutional democracy, including how the government derives its power from the people and the primacy of individual liberty. | **Shh! We're Writing the Constitution We, the People of the United States** | [redacted] |
| 4. Understand how the Constitution is designed to secure our liberty by both empowering and limiting central government and compare the powers granted to citizens, Congress, the president, and the Supreme Court with those reserved to the states. | **Shh! We're Writing the Constitution We, the People of the United States** | [redacted] |
| 5. Discuss the meaning of the American creed that calls on citizens to safeguard the liberty of individual Americans within a unified nation, to respect the rule of law, and to preserve the Constitution. | [redacted] | [redacted] |
| 6. Know the songs that express American ideals (e.g., "America the | | [redacted] |

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| Beautiful," "The Star Spangled Banner"). ☆ | | |
| **5.8 Students trace the colonization, immigration, and settlement patterns of the American people from 1789 to the mid-1800s, with emphasis on the role of economic incentives, effects of the physical and political geography, and transportation systems.** | | |
| 1. Discuss the waves of immigrants from Europe between 1789 and 1850 and their modes of transportation into the Ohio and Mississippi Valleys and through the Cumberland Gap (e.g., overland wagons, canals, flatboats, steamboats). | [redacted] | [redacted] |
| 2. Name the states and territories that existed in 1850 and identify their locations and major geographical features (e.g., mountain ranges, principal rivers, dominant plant regions). | [redacted] | [redacted] |
| 3. Demonstrate knowledge of the explorations of the trans-Mississippi West following the Louisiana Purchase (e.g., Meriwether Lewis and William Clark, Zebulon Pike, John Fremont). | [redacted] | [redacted] |
| 4. Discuss the experiences of settlers on the overland trails to the West (e.g., location of the routes; purpose of the journeys; the influence of the terrain, rivers, vegetation, and climate; life in the territories at the end of these trails). ☆ | | [redacted] |
| 5. Describe the continued migration of Mexican settlers into Mexican territories of the West and Southwest. | | [redacted] |
| 6 .Relate how and when California, Texas, Oregon, and other western lands became part of the United States, including the significance of the Texas War for Independence and the Mexican-American War. | | [redacted] |
| **5.9 Students know the location of the current 50 states and the names of their capitals.** | | |
| 1. Students know the location of the current 50 states and the names of their capitals. | | [redacted] |

*Unit 1- School*

***Unit 1 Lesson 2-**
**Objective-** Discuss school supplies and reinforce school vocabulary.
**Materials-** Additional worksheet titled "School Tools"
**Page number/connection-**

- Page T61
- Provides pictures connecting with Vocabulary and Writing Process Strategies in the blue section to give background knowledge.

**Time of Use-** Workshop

***Unit 1 Lesson 8-**
**Objective-.** Getting ideas for writing, creating background knowledge by thinking of their experiences in sports
**Materials-** Additional worksheet titled "Sports" to be used in conjunction with Writing Process Strategies in the blue section
**Page number/connection- Page** T157
**Time of Use-** During the Blue section "Writing Process Strategies, Getting Ideas"

***Unit 1 Lesson 10-**
**California State Social Science Standard-** K.4 #3 Identify traffic symbols and map symbols.
**Objective-** The student will begin to think about rules in connection with traffic symbols.
**Materials-** Additional worksheet titled "Traffic symbols"
**Page number/connection-** Page T175, Science/ Social Studies Connection
**Time of Use- Integration**

***Unit 1 Lesson 15 –**
**California State Social Science Standard-** K.4 #4 Construct maps and models of neighborhoods…
**Objective-** The student makes a connection of what tools a person needs for their job.
**Materials-** Additional worksheet titled "Find Where they go"
**Page number/connection-** This pages bridges the gap from jobs within the school to jobs within the community.

**Time of Use-** Integration

***Unit 1 Lesson 20 –**
**California State Social Science Standard-** K.4 #2 Distinguish between land and water on maps and globes…
**Objective-** The student's will think about maps and complete a map, learning the difference between land and water.
**Materials- Additional** worksheet titled "Land and Water- Looking for Home" and "Maps and Globe"
**Page number/connection-** Page 331, connection to Science/ Social Studies Connection in the Inquiry section
**Time of Use-** Integration

## *Unit 2- Shadows*

*** Unit 2 Lesson 1**

**Objective** – This activity is a pre-teach to shadows, since it is our first day of shadows this is an extra activity to get the students excited and for them to gain information about shadows.

**Vocabulary**- Shadow

**Materials** – For this lesson you will need the worksheet provided, Shadow Shapes.

**Page Number/Connection- The** connection to OCR is having the students have a better understanding to Shadows.

**Time of use-** This lesson should be used during workshop or during integration.

***Unit 2 Lesson 10**

**Objective** – For this activity you can use the attached worksheet for this lesson for the Science/Social Studies Connection in the OCR book. This worksheet is used to help us describe in front of and behind with a picture of a bear and a tree.

**Vocabulary**- In front of, behind, over, under, beside, near, far, above, below.

**Materials** – For this lesson you will need the worksheet provided, the picture of the bear and the tree. .

**Page Number/Connection- The** connection to OCR is on page T151 and it is under the Science/Social Studies Connection.

**Time of use-** This lesson should be done during the red section.

***Unit 2 Lesson 20 Closer**

**California State Science Standard-** 3 #C Students know how to identify resources from Earth that are used in everyday life…

**Objective** – This activity is a science experiment that involves the sun. This activity should be done on a hot sunny day to ensure that the objects melt. The time it takes for each thing to melt will vary.

**Vocabulary**- Solar heat

**Materials** – For this lesson you will need the worksheet, Melting Pots to explain the lesson, also you will need chocolate chips, muffin tin, butter and ice.

**Page Number/Connection-** This lesson connects to shadows unit and will be a great activity to show the students about the sun.

**Time of use-** This lesson should be used during a closer activity with the other kindergarten teachers.

## *Unit 3- Finding Friends*

***Unit 3 Lesson 5 –**

**California State Science Standard-** 2 #a students know how to observe and describe similarities and differences…plants and animals.

**Objective- the** students learn the difference between living and non-living things.

**Materials- Additional** worksheet titled " Earth's Environments"

**Page number/connection- This** is a pre-teach for upcoming lesson 20, to vocabulary, terms and ideas of Living and non-living things.
**Time of Use- Integration**

***Unit 3 Lesson 10 –**
**California State Science Standard-** 3 #a Students know characteristics of mountains, rivers, oceans, valleys and deserts and local landforms.
**California State Social Science Standard-** K.4 #2 Distinguish between land and water on maps and globes… & K.4 #3
**Objective-** The student's create a map of the playground
**Materials- 3*5** index card, poster paper
**Page number/connection- Page** T161
**Time of Use- During** Inquiry- Science/Social Studies Connection

***Unit 3 Lesson 15-**
**California State Science Standard-** 2 #a students know how to observe and describe similarities and differences…plants and animals.
**Objective-** The students think about living things and how they grow
**Materials- Additional** worksheet titled " Living Things Grow, scissors, glue
**Page number/connection- Pre**-teach for upcoming lesson 20, experiment poster and Inquiry
**Time of Use- Integration**

***Unit 3 Lesson 20-**
**California State Science Standard-** 2 #a students know how to observe and describe similarities and differences…plants and animals.
**Objective-** Students will discuss and sort living and non-living things and show knowledge by pasting on chart paper under the appropriate heading.
**Materials- Pictures** of living and nonliving things (provided), cut them out, Chart paper and headings (provided) cut them out, glue, crayons
**Page number/connection-** Page T287 Science/Social Studies connection
**Time of Use- Integration**

***Unit 4-The Wind Unit***

***Unit 4 Lesson 3**
**California State Science Standard-** 4 #a Observe common objects by using the five senses
**Objective** – This activity is to reinforce the five senses. We work on the five senses almost all year and this activity helps the students have a greater understanding.
**Vocabulary-** Sight, Sound, Taste and Smell
**Materials** – For this lesson you will need the worksheet provided, Taste and Smells, Sights and Sounds.
**Page Number/Connection- The** connection to OCR is in the blue section GUMS section page T77.
**Time of use-** This activity should be done during the blue section GUMS section.

***Unit 4 Lesson 15**
**California State Science Standard-** 4 #a Observe common objects by using the five senses
**Objective** – This activity is to be used with the Science/Social Studies Connection it is an additional activity to reinforce about the five senses through life science examples.
**Vocabulary**- Senses, living things, organism, Nonliving things.
**Materials** – For this lesson you will need the worksheet provided, Characteristics of Organisms.
**Page Number/Connection- The** connection to OCR is using this fun activity after you do the Science/Social Studies Connection. It pulls together because it uses fun poems about the five senses. The Science/Social Studies Connection is on page T229.
**Time of use-** This lesson should be used during the red section in the OCR book.

***Unit 4 Lesson 20**
**California State Science Standard-** 3 #b students know changes in weather occur from day to day…
**Objective** – This activity is gathering, recording and Interpreting Data by observing the weather and tying this into the story, "Wind Says Goodnight"
******This lesson we all need to do the week prior to lesson 20
**Vocabulary**- weather
**Materials** – For this lesson you will need the worksheet provided, Gather, Record and Interpret Data.
**Page Number/Connection- The** connection to OCR is using the worksheet with T313 Science and Social Studies connection.
**Time of use-** This lesson should be done during the red section.

***Unit 4 Lesson Closer**
**California State Science Standard-** 3 #b students know changes in weather occur from day to day
**Objective** – This activity is a wrap up on the weather and wind that we have learned through out this unit.
**Vocabulary**- Weather Forecaster
**Materials** – For this lesson you will need the worksheet provided, Weather Forecaster.
**Page Number/Connection- The** connection to OCR is we learned about weather and the wind and this is one last activity to wrap up the unit.
**Time of use-** This lesson should be done during the closer.

***Unit 5 -Stick To It***

***Unit 5 Lesson Opener –**
**California State Science Standard-** 2 #c Students know how to identify major structures of common plants and animals

**Objective**- The student will plant a bean and watch it grow, we will discuss "Sticking" to it when watering and taking care of our plants.
**Materials**-

1. Small cup (20)
2. Bean (20)
3. Soil
4. Watering can
5. Room near a window/tray

**Page number/connection**- **Science** Standard #2c
**Time of Use**- **During** the opener and the following weeks as we water our plants. We will call each student back to water his or her own plant every other day.

***Unit 5 Lesson 5 –**
**California State Science Standard**- 2 #c Students know how to identify major structures of common plants and animals

**Objective**- We will discuss how plants grow, how we use plants for food and how plants grow on a farm, to the store to our homes.
**Materials**- **Additional** worksheets titled "Plants" and "From Farm to You", scissors and glue
**Page number/connection**- **T81** Science/Social studies connection
**Time of Use**- During Inquiry/Science/Social Studies connection, finish during integration

**Unit 5 Lesson 15 -**
**Objective**- The students will think about Animal Habitats and draw the habitats for a fish, lion and bear
**Materials**- **Additional** worksheets titled" Animal Behaviorist", and Winter Habits
**Page number/connection**- **T207**- Students will think about Animal habitats
**Time of Use**- **Inquiry**, Science/Social Studies Connection...finish during integration

***Unit 5 Lesson 20 -**
**California State Science Standard**- 2 #c Students know how to identify major structures of common plants and animals

**Objective**- The students will compare different plants, and discuss their appearance.
**Materials**- Additional worksheet titled "Compare"
**Page number/connection**- Page T287
**Time of Use**- Science/Social Studies connection/Inquiry

***Unit 5 Lesson 20 –**
**California State Science Standard**- 3 #C Students know how to identify resources from Earth that are used in everyday life…

**Objective**- Students will discuss the importance of Recycling and why we recycle. Students will think back to our selection; Wanda's Roses
**Materials**- Additional Worksheet titled "Recycle, Recycle"

**Page number/connection- Science** Connection #3c
**Time of Use-** Integration

***Unit 5 Lesson Closer –**
**California State Social Science Standard-** K.6 #3 Understand how people lived in earlier times and how their lives would be different today.
**Objective-** Students will make butter with the "Stick to It" attitude!

**Materials-**

1. Half-pint or 250mL of whipping cream or heavy cream
2. 2-cup (500 mL) plastic jar with a lid that seals to be watertight
3. Whisk or fork
4. Crackers
5. Butter knife

**Page number/connection-** Social Science Standard K.6 #3
**Time of Use-** Sometime during the Closer

***Unit 6- Red, White, and Blue***

***Unit 6 Lesson Opener**
**California State Social Science Standard-** K.6 #2 knows the triumphs in American Legends and historical accounts
**Objective** – This activity should be used with the opener. It allows the students to see a picture of a famous baseball player and learn how baseball relates to Red, White and Blue.
**Vocabulary-** Jackie Robinson
**Materials** – For this lesson you will need the worksheets provided, Jackie Robinson and the coloring page of Jackie Robinson.
**Page Number/Connection- The** connection to OCR is having the students see how baseball relates to Red, White and Blue.
**Time of use-** This lesson should be done during the opener of Red, White and Blue.

***Unit 6 Lesson 5**
**California State Social Science Standard-** K.2 Students recognize national and state symbols and icons…
**Objective** – This lesson goes with the Science/Social Studies Connection because it has the students look at pictures of the American Flag and then draw their own picture of the American Flag.
**Vocabulary-** Symbols of the United States, The American Flag
**Materials** – For this lesson you will need the worksheet provided, Symbols of the United States.
**Page Number/Connection- The** connection to OCR is the Science/Social Studies Connection on page T87.

**Time of use-** This lesson should be incorporated with the Science/Social Studies Connection.

***Unit 6 Lesson 10**
**California State Social Science Standard-** K.6 #1 Identify the purposes of and the people and events honored, in commemorative holidays & K.6 #2
**Objective** – This activity goes with the Science/Social Studies Connection when we learn about, "Hats off for the Forth of July." In this section we learn about the influence of people in our past.
**Vocabulary**- Martin Luther King Jr. and Robert Fulton
**Materials** – For this lesson you will need the worksheet provided, Martin Luther King Jr. and Robert Fulton.
**Page Number/Connection- The** connection to OCR is using the Science Social Studies Connection and using the provided worksheets to help the students see a visual picture of these heroes. This is on page number T165.
**Time of use-** This lesson should be incorporated with the Science/Social Studies Connection.

***Unit 6 Lesson 15**
**California State Social Science Standard-** K.1 #2 Learn examples of honesty, courage, determination, individual responsibility and patriotism in American and world history from stories and folklore.
**Objective** – This activity is to reinforce what the students have learned from the poem, "America the Beautiful."
**Vocabulary**- America the Beautiful
**Materials** – For this lesson you will need the worksheet provided, Our Land.
**Page Number/Connection- We** have just learned about the poem, "America the Beautiful," and in the TE and on page T223 the Science/Social Studies Connection wants the students to be able to locate where the mountains are the plains... Give gives the students the ability to see and work on there own paper.
**Time of use-** This lesson should be incorporated with the red section during the Science/Social Studies Connection.

***Unit 6 Lesson 20**
**California State Social Science Standard-** K.4 #2 Distinguish between land and water on maps and globes…
**Objective** – This activity is a map of the word in connection with, "The American Wei." In this lesson it calls for a map of the world and allows the students to see their own picture of a map and locate where the other countries are located.
**Vocabulary**- Map of the World
**Materials** – For this lesson you will need the worksheet provided, The World.
**Page Number/Connection- The** connection to OCR is on page T309 and it is with connection to the Science/Social Studies Connection.
**Time of use-** This lesson should be done with the red section during the Science/Social Studies Connection.

***Unit 6 Integration**
**California State Science Standard-** 2 #a students know how to observe and describe similarities and differences…plants and animals.
**Objective** – These worksheets are extra activities to do during integration about different learning environments.
**Vocabulary**- Forest, Rain Forest, Desert, Ocean
**Materials** – For this lesson you will need the worksheets provided, What Would You Do.
**Page Number/Connection-**
**Time of use-** This lesson should be used during integration.

*Unit 7- Teamwork*

***Unit 7 Lesson 5-**
**California State Social Science Standard-** K.6 #3 Understand how people lived in earlier times and how their lives would be different today.
**Objective-** The student's will make the connection of Past/Present.
**Materials-** Additional Worksheet titled "Today and Long Ago"
**Page number/connection- Page** T91
**Time of Use- During** Inquiry/Science/Social Studies connection

***Lesson 10 –**
**California State Science Standard-** 2 #a students know how to observe and describe similarities and differences…plants and animals.
**Objective-** Students compare and contrast different animals, sorting by color, shape, size, texture and weight.
**Materials-** Additional Worksheet titled "Sort"
**Page number/connection-** Page T175
**Time of Use-** Integration

***Unit 7 Lesson 15 -**
**California State Science Standard-** 3 #C Students know how to identify resources from Earth that are used in everyday life…
**Objective-** The student's will learn about natural resources and continue talking about the importance of recycling.
**Materials-** Additional worksheet titled "Earth's Resources"
**Page number/connection-** Supplement pre-teach to Science/Social Studies Connection
**Time of Use-** ****Pre-teach before Science/Social Studies connection

*Unit 8-By the Sea*

***Unit 8 Lesson Opener**
**California State Science Standard-** 3 #C Students know how to identify resources from Earth that are used in everyday life…

**Objective** – This activity is an introduction about water. What we can do with water, swimming, bathing, drinking, and watering.
**Vocabulary**- Water
**Materials** – For this lesson you will need the worksheet provided, Water.
**Page Number/Connection- The** connection to OCR is that this unit is all about water and it is a pre-teach about water.
**Time of use-** This lesson should be done during the opener.

***Unit 8 Lesson 10**
**California State Science Standard-** 3 #a Students know characteristics of mountains, rivers, oceans, valleys and deserts and local landforms.
**Objective** – This activity is a worksheet that goes with the Science/Social Studies Connections about objects that can float or sink in water. This reinforces what the red section goes over.
**Vocabulary**- Sink, Float
**Materials** – For this lesson you will need the worksheet provided, sink or Float
**Page Number/Connection- The** connection to OCR is on page T177 the Science/Social Studies Connection. This worksheet helps continue the knowledge about water and sinking and floating.

**Time of use-** This lesson should be used during the red section Science/Social Studies Connection.

***Unit 8 Lesson 20**
**California State Science Standard-** 1 #b Students know water can be a liquid or a solid and can be made to change back and forth from one form to another.
**Objective** – This activity is a pre-teach activity to the closer activity. It shows the students the differences between solids and liquids. The closer activity we will give the students popsicles and have them look how it is a solid and a liquid.
**Vocabulary**- Forms of water
**Materials** – For this lesson you will need the worksheet provided, Forms of Water.
**Page Number/Connection- The** connection is having the students see the difference between solid forms of water and liquid.
**Time of use-** This lesson should be used during workshop or during integration.

***Unit 8 Closer-**
**California State Science Standard-** 1 #b Students know water can be a liquid or a solid and can be made to change back and forth from one form to another.
**Objective-** Students will be given their own popsicles and realize that it is solid. Then the students will lick their popsicles and see how it turns into a liquid.
**Page Number/Connection-** Science Standard 1 #b
**Time of use-** Sometime during the Closer

| | A | B | C | D | | |
|---|---|---|---|---|---|---|
| 1 | **Trade Books and Resources** | **OCR Unit Theme** | **Lesson #** | **Key Learning** | 1 | |
| 2 | My School Day by Lee Scott *NG | School | 2 | School Tools | 2 | |
| 3 | Going to School By Leroy Taylor *NG | School | 10 | Traffic Symbols | 3 | |
| 4 | Rules Help By Marvin Buckley * NG | School | 15 | Find Where they Go | 4 | |
| 5 | | School | 20 | Looking for home | 5 | |
| 6 | | School | 20 | Land and Water/Maps and Globes | 6 | |
| 7 | Shadow Play by Helen Mammides *NG | Shadows | 1 | Shadows and Shapes | 7 | |
| 8 | | Shadows | 20 | Melting Pot experiment | 8 | 3. #C Students |
| 9 | Best Friends By Marvin Buckley *NG | Finding Friends | 5 | Earth's Environment | 9 | 2. #a students l |
| 10 | My Friend and I By Sharon Street *NG | Finding Friends | 10 | Playground Map | 10 | 3. #a Students |
| 11 | On a Map By Louis Capra *NG | Finding friends | 15 | Living Things grow | 11 | 2. #a students l |
| 12 | Feelings By Jan Pritchett *NG | Finding Friends | 20 | Living or nonliving Experiment | 12 | 2. #a students l |
| 13 | Fall Colors By Santina Bruni *NG | The Wind | 5 | Wind Sock | 13 | 3. #b students |
| 14 | Spring, Summer, Fall, Winter By David Tunkin *NG | The Wind | 10 | Around the world | 14 | |
| 15 | Look at the Leaves by Rachel Griffiths *NG | The Wind | 10 | Weather changes | 15 | 3. #b students |
| 16 | Numbers in our World By Rachel Giffiths and Margaet Clyne *NG | The Wind | 15 | Characteristics of Organisms Story/Sights and Soun | 16 | 4.#a Observe c |
| 17 | | The Wind | 20 | Gather, Record and Interpret Data | 17 | 3. #b students |
| 18 | In the Garden By Rose Lorenzo *NG | Stick to it | Opener | Planting a bean experiment | 18 | 2. #c Students |
| 19 | My Bean Plant By Joseph Ciciano *NG | Stick To It | 5 | Plants & From Farm to You | 19 | 2. #c Students |
| 20 | When the Rain Comes By Marilyn Woolley *NG | Stick to it | 15 | Animal Behaiorist & Winter Habits | 20 | |
| 21 | | Stick To It | 20 | Compare | 21 | 2. #c Students |
| 22 | | Stick to it | 20 | Recycle, Recycle | 22 | 3. #C Students |
| 23 | | Stick to it | Closer | Butter Churning Experiment | 23 | |
| 24 | The Olympics By Anita Garmon *NG | Red, White, Blue | Opener | Jackie Robinson page/Sport pages | 24 | |
| 25 | Symbols of Freedom By Jeanne and Bradley Weaver *NG | Red, White, Blue | 5 | Symbols of United States | 25 | |
| 26 | Flags By Jan Pritchett *NG | Red, White, Blue | 10 | Our Heroes, MLK Jr. and Robert Fulton | 26 | |
| 27 | The Fourth of July By Nick Bruce *NG | Red, White, Blue | 15 | Our Land | 27 | |
| 28 | | Red, White, Blue | 20 | Map of the World | 28 | |
| 29 | | Red, White, Blue | | Organisms and Environments & What would you d | 29 | 2. #a students l |
| 30 | Now and Then By Faridah Yusof *NG | Teamwork | 5 | Today and Long Ago | 30 | |
| 31 | New and Old By David Tunkin *NG | Teamwork | 10 | Sort | 31 | 2. #a students l |
| 32 | Who Works at the Zoo By Sarah Russell *NG | Teamwork | 15 | Earth's Resources | 32 | 3. #C Students |
| 33 | Sharks By Pamela Rushby *NG | By The Sea | 10 | Sink and Float | 33 | 3. #a Students |
| 34 | Life in the Ocean By George Huxley *NG | By The Sea | 20 | Forms of Water & Water | 34 | 1. #b Students |
| 35 | See the Boats Go! By Leilani Matai *NG | By The Sea | Closer | Popsicle Experiment | 35 | 1. #b Students |
| 36 | | | | | 36 | |
| 37 | Feeding Time By Dominic Loughrey *NG | Teamwork- Continued | | | 37 | |
| 38 | Taking Care of Farm Animals By Dimi Stanos *NG | Teamwork- Continued | | | 38 | |
| 39 | The Baby Shark By Sharon Street *NG | By the Sea- Continued | | | 39 | |
| 40 | What Can a Diver See? By Jacob Fink *NG | By the Sea- Continued | | | 40 | |
| 41 | | | | | 41 | |
| 42 | *NG= National Geographic Windows on Literacy Book | | | | 42 | |

| | E | | F |
|---|---|---|---|
| 1 | **Connection to Science Standard** | 1 | **Connection to Social Scienc** |
| 2 | | 2 | |
| 3 | | 3 | K.4 #3 Identify traffic symbols and map symbols. |
| 4 | | 4 | K.4 #4 Construct maps and models of neighborhoods… |
| 5 | | 5 | K.4 #2 Distinguish between land and water on maps and globes… |
| 6 | | 6 | K.4 #2 Distinguish between land and water on maps and globes… |
| 7 | | 7 | |
| 8 | 3. #C Students know how to identify resources from Earth that are used in everyday life… | 8 | |
| 9 | 2. #a students know how to observe and describe similarities and differences…plants and animals. | 9 | |
| .0 | 3. #a Students know characteristics of mountains, rivers, oceans, valleys and deserts and local landforms. | 10 | K.4 #2 Distinguish between land and water on maps and globes… & K.4 #3 |
| .1 | 2. #a students know how to observe and describe similarities and differences…plants and animals. | 11 | |
| .2 | 2. #a students know how to observe and describe similarities and differences…plants and animals. | 12 | |
| .3 | 3. #b students know changes in weather occur from day to day… | 13 | |
| .4 | | 14 | K.4 #2 Distinguish between land and water on maps and globes… |
| .5 | 3. #b students know changes in weather occur from day to day… | 15 | |
| .6 | 4.#a Observe common objects by using the five senses | 16 | |
| .7 | 3. #b students know changes in weather occur from day to day… | 17 | |
| .8 | 2. #c Students know how to identify major structures of common plants and animals | 18 | |
| .9 | 2. #c Students know how to identify major structures of common plants and animals | 19 | |
| 20 | | 20 | |
| 21 | 2. #c Students know how to identify major structures of common plants and animals | 21 | |
| 22 | 3. #C Students know how to identify resources from Earth that are used in everyday life… | 22 | |
| 23 | | 23 | K.6 #3 Understand how people lived in earlier times and how their lives would be di |
| 24 | | 24 | K.6 #2 Knows the triumphs in American Legends and historical accounts |
| 25 | | 25 | K.2 Students recognize national and state symbols and icons… |
| 26 | | 26 | K.6 #1 Identify the purposes of and the people and events honored, in commemorati |
| 27 | | 27 | K.1 #2 Learn examples of honesty, courage, determination, individual responibility a |
| 28 | | 28 | K.4 #2 Distinguish between land and water on maps and globes… |
| 29 | 2. #a students know how to observe and describe similarities and differences…plants and animals. | 29 | |
| 30 | | 30 | K.6 #3 Understand how people lived in earlier times and how their lives would be di |
| 31 | 2. #a students know how to observe and describe similarities and differences…plants and animals. | 31 | |
| 32 | 3. #C Students know how to identify resources from Earth that are used in everyday life… | 32 | |
| 33 | 3. #a Students know characteristics of mountains, rivers, oceans, valleys and deserts and local landforms. | 33 | |
| 34 | 1. #b Students know water can be a liquid or a solid and can be made to change back and forth from one form to an | 34 | other. |
| 35 | 1. #b Students know water can be a liquid or a solid and can be made to change back and forth from one form to an | 35 | other. |
| 36 | | 36 | |
| 37 | | 37 | |
| 38 | | 38 | |
| 39 | | 39 | |
| 40 | | 40 | |
| 41 | | 41 | |
| 42 | | 42 | |

| | F | G |
|---|---|---|
| 1 | **Connection to Social Science Standard** | **Gaps** |
| 2 | | Support inquiry Sci/SS connection |
| 3 | K.4 #3 Identify traffic symbols and map symbols. | |
| 4 | K.4 #4 Construct maps and models of neighborhoods… | |
| 5 | K.4 #2 Distinguish between land and water on maps and globes… | |
| 6 | K.4 #2 Distinguish between land and water on maps and globes… | Integration time |
| 7 | | Supporting background knowledge |
| 8 | | Integration |
| 9 | | Support inquiry Sci/SS connection |
| 10 | K.4 #2 Distinguish between land and water on maps and globes… & K.4 #3 | |
| 11 | | |
| 12 | | Integration |
| 13 | | |
| 14 | K.4 #2 Distinguish between land and water on maps and globes… | |
| 15 | | Integration |
| 16 | | Finish during integration |
| 17 | | Inquiry |
| 18 | | |
| 19 | | Inquiry |
| 20 | | Inquiry |
| 21 | | |
| 22 | | |
| 23 | K.6 #3 Understand how people lived in earlier times and how their lives would be different today. | |
| 24 | K.6 #2 Knows the triumphs in American Legends and historical accounts | |
| 25 | K.2 Students recognize national and state symbols and icons… | Inquiry |
| 26 | K.6 #1 Identify the purposes of and the people and events honored, in commemorative holidays & K.6 #2 | |
| 27 | K.1 #2 Learn examples of honesty, courage, determination, individual responibility and patriotism in American and world history fromm stories and fol | Inquiry |
| 28 | K.4 #2 Distinguish between land and water on maps and globes… | |
| 29 | | Integration |
| 30 | K.6 #3 Understand how people lived in earlier times and how their lives would be different today. | |
| 31 | | |
| 32 | | |
| 33 | | |
| 34 | )ther. | |
| 35 | )ther. | |
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| 37 | | |
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| 41 | | |
| 42 | | |

| | E |
|---|---|
| 1 | **Connection to Science Standard** |
| 2 | |
| 3 | |
| 4 | |
| 5 | |
| 6 | |
| 7 | |
| 8 | 3. #C Students know how to identify resources from Earth that are used in everyday life… |
| 9 | 2. #a students know how to observe and describe similarities and differences…plants and animals. |
| 10 | 3. #a Students know characteristics of mountains, rivers, oceans, valleys and deserts and local landforms. |
| 11 | 2. #a students know how to observe and describe similarities and differences…plants and animals. |
| 12 | 2. #a students know how to observe and describe similarities and differences…plants and animals. |
| 13 | 3. #b students know changes in weather occur from day to day… |
| 14 | |
| 15 | 3. #b students know changes in weather occur from day to day… |
| 16 | 4.#a Observe common objects by using the five senses |
| 17 | 3. #b students know changes in weather occur from day to day… |
| 18 | 2. #c Students know how to identify major structures of common plants and animals |
| 19 | 2. #c Students know how to identify major structures of common plants and animals |
| 20 | |
| 21 | 2. #c Students know how to identify major structures of common plants and animals |
| 22 | 3. #C Students know how to identify resources from Earth that are used in everyday life… |
| 23 | |
| 24 | |
| 25 | |
| 26 | |
| 27 | |
| 28 | |
| 29 | 2. #a students know how to observe and describe similarities and differences…plants and animals. |
| 30 | |
| 31 | 2. #a students know how to observe and describe similarities and differences…plants and animals. |
| 32 | 3. #C Students know how to identify resources from Earth that are used in everyday life… |
| 33 | 3. #a Students know characteristics of mountains, rivers, oceans, valleys and deserts and local landforms. |
| 34 | 1. #b Students know water can be a liquid or a solid and can be made to change back and forth from one form to an |
| 35 | 1. #b Students know water can be a liquid or a solid and can be made to change back and forth from one form to an |
| 36 | |
| 37 | |
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| 39 | |
| 40 | |
| 41 | |
| 42 | |

# Four Point Rubric - Conventions

| Conventions | 1 Point | 2 Points | 3 Points | 4 Points |
|---|---|---|---|---|
| Mechanics: Capitalization | Uses capitalization correctly at the beginning of sentences and with proper nouns, for the pronoun *I*, greetings, months, days of the week, and titles and initials of people. | Uses capitalization correctly for previously mentioned forms and with geographical names, holidays, historical periods, and special events. | Uses capitalization correctly for previously mentioned forms and with names of magazines, newspapers, works of art, musical compositions, organizations, and the first word in quotations when appropriate. | Consistently uses correct capitalization. |
| Mechanics: Punctuation | Uses end punctuation correctly. Inconsistently uses commas and quotation marks. Punctuates dates, cities and states, and titles of books incorrectly. | Uses correct punctuation for previously mentioned forms. Inconsistently punctuates greetings and items in a series correctly. | Consistently uses punctuation of previously mentioned forms correctly. Punctuates parentheses, commas in direct quotations, and apostrophes correctly. | Consistently uses correct punctuation for previously mentioned forms. Uses a colon to separate hours and minutes and to introduce a list. Correctly punctuates titles of poems, songs, and short stories. |
| Grammar and Usage | Uses correct verb tense, singular and plural nouns, contractions, and adjectives. | Consistently demonstrates standard usage of previously mentioned items and with pronouns, compound words, articles, and subject-verb agreement. | Consistently demonstrates standard usage of previously mentioned items and with irregular verbs, adverbs, prepositions, and coordinating conjunctions. | Consistently demonstrates standard usage of previously mentioned items. Correctly uses verbs that are often misused (e.g., lie/lay, sit/set, rise/raise) and modifiers. |
| Sentence Structure | Uses a variety of simple and compound sentences. A few run-ons or sentence fragments may be present. | Consistently and effectively uses a variety of simple and compound sentences (including declarative, interrogative, imperative, and exclamatory). No run-ons or sentence fragments present. | Consistently and effectively uses all previously mentioned sentence structures. Sentence patterns and length are varied, effective, and enhance what is written. Uses appositives, participial phrases, adjectives, adverbs, and prepositional phrases. | Consistently and effectively uses all previously mentioned sentence structures. Uses independent and dependent clauses, transitions, and conjunctions to connect ideas. |
| Spelling | Spells frequently used, irregular words, basic short-vowel, long-vowel, *r*-controlled, consonant-blend patterns, and grade-appropriate sight words correctly. | Correctly spells grade-appropriate words with blends, contractions, orthographic patterns, compound words, and common homophones. | Correctly spells all previously mentioned words. Uses correct sound spelling patterns and structural patterns. Understands affixes, homophones, and meaning patterns. | Correctly spells all previously mentioned word forms along with words containing roots, inflections, affixes, and syllable constructions. |

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# Four Point Rubric - Genre

| Genre | 1 Point | 2 Points | 3 Points | 4 Points |
|---|---|---|---|---|
| Narrative Structure | Statements are related to topic. Purpose (explain, describe, etc.) apparent. Extraneous material may be present. | Statements are related to topic. Purpose apparent. Main points and supportive details can be identified. | Statements clearly on topic. Focused and organized around main points with supportive facts and assertions. Purpose obvious. | Statements clearly organized around main points with supportive facts or assertions. Supports facts with reference to prior knowledge. Use compare and contrast in developing main points. |
| Narrative Character | Describes and compares story characters with basic descriptors such as *nice* or *mean*. | Describes characters in increasing detail, including both physical and mental qualities such as *strong* or *kind*. | Describes characters with previously mentioned details along with descriptors of characters' thoughts, feelings, and desires. | Describes characters with previously mentioned details. Life-like characters' actions and speech reflect qualities that enhance plot. |
| Narrative Plot | Plot developed around a problem and its resolution. Moves logically with little elaboration or detail. | Plot developed around a problem, failed attempts, complications, and resolution. Moves logically through time with elaborate details. | Plot developed as previously described. Additionally, sequence of events move logically with elaborately detailed beginning, middle, and ending. Includes an effective conclusion. Subject and theme well developed throughout. | Plot includes all previously mentioned elements. Also includes more complicated plot lines with varied timelines, flashbacks, or dual story lines. |
| Narrative Setting | Setting includes descriptions of time, character, and place. | Setting details are distinctive and appropriate to the story type (fantasy vs. realistic settings). | Setting includes all previously mentioned details and is described in ways that contribute to mood, suspense, humor, or excitement of the story. | Setting includes all previously mentioned details and is described in a way that influences story's problems and resolutions or contributes to other story elements, such as character and plot. |
| Expository Structure | Statements are related to topic. Purpose apparent. Main points and supportive details can be identified. | Statements clearly on topic. Focused and organized around main points with supportive facts and assertions. Purpose obvious. | Statements clearly organized around main points with supportive facts or assertions. Supports facts with reference to prior knowledge. Uses compare and contrast in developing main points. | Expository statements include previously mentioned structures. Statements trace and construct a line of argument, identifying part-to-whole relations. |
| Persuasive | Statements too insufficient to show writer's purpose. No order or organization apparent. | Statements generally related to topic. Position vague or lacks clarity. Unrelated ideas or multiple positions included. | Statements related to topic. Opening identifies position. Middle paragraphs develop and support position. Includes effective closing. | Statements include previously mentioned structures. Sets scope and purpose of paper in introduction. Position focused, organized, and maintained throughout. Facts support position. Includes effective closing. |
| Formal Letter | Writing demonstrates no awareness of standard business letter form. Purpose and context not clear. | Writing demonstrates some awareness of standard business letter form. Inconsistent use and placement of date, salutation, body, closing, and signature. Lacks clarity of purpose and content. | Writing demonstrates consistent use of standard business letter form including date, salutation, body, closing, and signature. Content focused and organized. Purpose apparent. | Writing demonstrates consistent use of standard business letter form with correct punctuation. Content exceptionally clear, focused, and organized. Purpose clearly stated. |

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# Four Point Rubric - Writing Traits

| Writing Traits | 1 Point | 2 Points | 3 Points | 4 Points |
|---|---|---|---|---|
| Ideas/Content/Focus | Main ideas and purpose not clearly stated. Superficial, with minimal content. Topic overly broad, simplistic, or unclear. No position or direction evident. Extraneous material present. | Main ideas and purpose stated. Topic may be overly broad and simplistic. Position/purpose/ direction is unclear and must be inferred. Result may be ineffective. | Main ideas and content clear, focused, and interesting. Topic stated. Position/purpose introduced and maintained. Supporting details included. | Main ideas and content very clear and strongly supported with rich details. Topic/position/purpose clearly stated and maintained throughout. Topic and details tied to central theme or purpose. Focus based on purpose, audience, and format requirements. |
| Organization (how well a piece is clearly organized, logically sequenced, and appropriately paragraphed; overall effect of writing) | Organization haphazard and disjointed. Order and structure loosely planned. Sequence of events or facts not consistently logical. Transitions awkward. Beginning use of paragraphing. | Organization clear and coherent. Order and structure apparent. Sequence of events logical. Details may be a listing of facts/ideas. Transitions adequate. Beginning and conclusion lack impact. Paragraphs attempt to develop a central idea. | Organization enhances central idea and its development. Key concepts logically sequenced. Beginning grabs reader, conclusion adds impact. Transitions enhance meaning and flow. Paragraphs develop central idea. | Organization includes perviously mentioned points. A variety of transitions enhance meaning and flow. Paragraph organized around central idea and develop main idea and purpose of composition. |
| Word Choice | Vocabulary limited with frequently misused words. Language monotonous. Word usage simplistic, repetitive, inappropriate, or overused. | Vocabulary ordinary, lacks preciseness and variety. May be inappropriate to purpose of audience. Words and expressions convey general rather than specific message. | Vocabulary shows some varied and interesting words. Expressions are clear and convey intended message. Words generally appropriate for audience and purpose. Includes vivid and descriptive language. | Vocabulary is varied. Consistenly uses interesting, descriptive words and expressions appropriate to audience and purpose. Expressions chosen for impact and to convey intended message. Literary devices used. |
| Elaboration (supporting details and examples that develop the main idea) | Elaboration of ideas is sketchy or redundant. Details offer little support for key ideas. | Elaboration of ideas includes some sketchy, redundant, or general details. Support for key ideas is uneven. | Elaboration of ideas includes a mix of general statements, specific details, and examples. Support is mostly relevant, but may be uneven and lack depth. | Elaboration of ideas includes specific details and supporting examples for key points/ideas. May use compare/contrast to support statements. |
| Voice | Voice is inappropriate to topic/ content/audience. Writing provides little sense of involvement or commitment. | Voice is evident, though it wavers between appropriate/inappropriate and impersonal/personal. Commitment to topic is inconsistent. | Voice is appropriate for topic/ purpose/audience. Writing demonstrates a consistent sense of commitment to topic. | Voice is appropriate for the topic/ purpose/audience. Unique style comes through. Writing is expressive, engaging, or sincere and shows a strong sense of commitment to topic. |
| Sentence Fluency | Sentences mechanical, repetitive, and simplistic. Writing difficult to follow. Awkward, choppy, or rambling sentence construction. | Sentences mechanical and simplistic. Occasional awkward sentence construction and paragraph transitions. | Sentences varied: simple, compound, and complex, creating an effective flow and rhythm. Contributes to ease in oral reading. Transitions smooth. | Sentences show high degree of craftsmanship. Strong, varied sentence construction. Enhances content of composition. Transition between sentences and paragraphs flow making oral reading easy and enjoyable. |
| Audience | Displays little or no sense of audience. Does not engage audience. | Displays some sense of audience. | Displays a strong sense of audience. | Displays a strong sense of audience. Engages the audience. |

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**WRITING RUBRIC** **Name:** _____

**Assignment :** _____ **Date:** _____

| **Conventions** | **1** | **2** | **3** | **4** |
|---|---|---|---|---|
| *Capitalization* | ***I capitalized…***<br>_the beginning of sentences<br>_proper nouns<br>_the word "I".<br>_greetings *<br>_months *<br>_days of the week *<br>_titles/initials of people * | ***I capitalized…***<br>_geographical names *<br>_holidays *<br>_historic periods *<br>_special events *<br><br>( * if applicable… try to find opportunities to use) | ***I capitalized…***<br>_names of magazines *<br>_newspapers *<br>_works of art *<br>_musical compositions *<br>_organizations *<br>_the first word in quotations * | ***I…***<br>_consistently used correct capitalization |
| *Punctuation* | ***I correctly and consistently used…***<br>_ a variety of end punctuations (. ! ?) | ***I correctly and consistently used…***<br>_commas<br>_quotation marks*<br>_dates, cities and states*<br>_titles of books* | ***I correctly and consistently punctuated…***<br>_greetings*<br>_items in a series<br>_parentheses<br>_commas in direct<br>_quotations<br>_apostrophes | ***I correctly and consistently used….***<br>_ colons to separate hours and minutes*<br>_colons to introduce a list<br>_titles of poems, songs, and short stories |
| *Grammar Usage and Mechanics* | ***I properly used…***<br>_consistent verb tense applicable to the genre<br>_singular and plural nouns<br>_contractions<br>_adjectives | ***I correctly used…***<br>_pronouns<br>_compound words<br>_articles<br>_subject-verb agreement | ***I correctly used…***<br>_irregular verbs<br>_adverbs<br>_prepositions<br>_coordinating conjunctions | ***I correctly used…***<br>_verbs that are commonly misused<br>_modifiers |
| *Sentence Structure* | ***I correctly used…***<br>_simple sentences<br>_compound sentences | ***I used…***<br>_no run-ons<br>_no sentence fragments | ***I used…***<br>_sentence patterns that are varied, effective, and enhance writing<br>_appositives (apposition)<br>_participial phrases,<br>_adjectives, adverbs<br>_prepositional phrases | ***I used…***<br>_independent and dependent clauses<br>_transitions<br>_conjunctions to connect ideas |
| *Spelling* | ***I correctly spelled…***<br>_frequently-used words<br>_irregular words<br>_sight words<br>***sp. Patterns:***<br>_short and long-vowel<br>_r-controlled<br>_consonant blend | ***I correctly spelled…***<br>_compound words<br>_homophones<br>***words with:***<br>_blends<br>_contractions | ***I correctly spelled…***<br>_affixes<br>_orthographic patterns | ***I correctly spelled…***<br>_words containing roots, inflections, affixes, and syllable constructions |

| Genre | 1 | 2 | 3 | 4 |
|---|---|---|---|---|
| *Narrative Structure* | ***I have...***<br>_ a topic<br>_ a purpose | ***I have...***<br>_ topic sentences<br>_ supporting details | ***I have included...***<br>_ facts and/or opinions | ***I have ...***<br>_ supported my facts with prior knowledge<br>_ compared and contrasted information |
| *Narrative Character* | ***I have described...***<br>_story characters using basic adjectives (nice, mean, cool) | ***I have described...***<br>_ mental and physical qualities of characters (strong, kind, generous) | ***I have described...***<br>_ thoughts, feelings, and desires of characters | ***I have described...***<br>_characters through their own actions and speech |
| *Narrative Plot* | ***My plot includes...***<br>_ a problem<br>_ a resolution<br>_ logical sequence | ***My plot includes...***<br>_ failed attempts<br>_ complications<br>_ a resolution<br>_ elaborate details | ***My plot includes...***<br>_ a detailed beginning, middle, and end<br>_ an effective conclusion | ***My plot includes...***<br>_ varied timelines<br>_ flashbacks<br>_ a dual story line (1 included) |
| *Narrative Setting* | ***I described...***<br>_ character<br>_ setting | ***I described...***<br>- a setting appropriate to the genre (fantasy vs. realistic fiction) | ***I described...***<br>_ a setting that creates mood, humor, suspense, or excitement | ***I described...***<br>_ a setting that affects the plot |
| *Expository Structure* | ***I have...***<br>_ a topic<br>_ a purpose<br>_ main points<br>_ supporting details | ***I have...***<br>_ facts and/or opinions | ***I have...***<br>_ supported my facts with prior knowledge<br>_ compared and contrasted information | ***I have...***<br>_ restated my thesis for a effective conclusion |
| *Persuasive* | ***I have...***<br>_ a position<br>_ arguments that support my position (personal) | ***I have...***<br>_an opening that states my position<br>_ a thesis statement | ***I have...***<br>_ middle paragraphs that develop and support my position<br>_ an effective ending | ***I have...***<br>_ focus and organization<br>_ supporting facts (research) |
| Formal Letter | ***I included...***<br>_ a salutation<br>_ a body | ***I included...***<br>_ the date<br>_ a closing<br>_ signature | ***My content...***<br>_is focused and organized<br>_ I have a clear purpose. | ***I included...***<br>_ correct punctuation<br>_ format |

| **Writing Traits** | **1** | **2** | **3** | **4** |
|---|---|---|---|---|
| *Ideas/ Content/ Focus* | ***I have…***<br>_ a main idea. | ***I have…***<br>_a clear main idea.<br>_ a purpose that can be inferred, but is not obvious. | ***I have…***<br>_ a clear and interesting main idea<br>_ a clear purpose throughout the paper<br>_ details that support my main idea | ***I have…***<br>_ multiple and varied details that enhance my paper |
| *Organization (clearly organized, logically sequenced, appropriately paragraphed)* | ***I have…***<br>_ distinct paragraphs<br>_ closing sentences and topic sentences | ***I have…***<br>_ clear organization<br>_ logical sequence of events<br>_ details that list facts and ideas<br>_ an introduction and a conclusion | ***I have…***<br>_ a beginning that grabs the readers attention<br>_ a conclusion that adds impact<br>_ paragraphs that develop my central idea | ***I have…***<br>_ a variety of effective transitions between paragraphs |
| *Word Choice* | ***I used…***<br>_ words | ***I used…***<br>_ words correctly | ***I used…***<br>_ words with high levels of specificity<br>_ varied and interesting language<br>_ vivid and descriptive language<br>_ vocabulary appropriate for my genre | ***I used…***<br>_ figurative language (similes, metaphors, idioms, alliteration, sarcasm, etc.) |
| *Elaboration (supporting details and examples)* | ***I have…***<br>_ details | ***I have…***<br>_ details that support my main ideas<br>_ varied details | ***I have…***<br>_ details and examples that clearly support my main idea<br>_ elaborated on my ideas with general and specific details<br>_ examples | ***I have…***<br>_ used compare / contrast |
| | | | | |

| | | | | |
|---|---|---|---|---|
| *Voice*<br>*(How committed are you to your topic, Unique style)* | | ***I have…***<br>_ commitment to my topic. | ***I have…***<br>_ clear and consistent commitment to my topic. | ***My commitment to my topic…***<br>_ is shown through expressive and sincere writing<br>_ is shown through my unique writing style |
| *Sentence Fluency* | ***I have…***<br>_ simple sentence structures<br>_ ideas | ***I have…***<br>_ clear sentence structures<br>_ transitions<br>_ ideas that are easy to follow | ***I have…***<br>_ varied sentence structures (simple, compound, and complex)<br>_ flow and rhythm<br>_ writing that is easy to read out loud | ***I have…***<br>_ enjoyable transitions that enhance my writing |
| *Audience* | It is clear for whom I am writing. | I engage an audience. | I really engage an audience! | I really, really engage an audience!!! The style, vocabulary and sentence structure is appropriate to the audience. |

Listening and Speaking Rubric
From SRA: Imagine It!

| | 1 | 2 | 3 | 4 |
|---|---|---|---|---|
| Listening | The student looks around or stares into the distance and is obviously not listening. He or she does not take notes, ask questions, or make comments. | The student listens sporadically and does not look at the speaker. He or she does not take notes, ask questions, or make comments. | The student listens and makes some eye contact with the speaker. He or she takes limited notes (if appropriate), asks only yes/no questions, and makes no comments about the presentation. | The student listens attentively and makes eye contact with the speaker. He or she takes notes (if appropriate), asks relevant questions, and makes comments about the presentation. |
| Speaking | The student speaks in conversational language with mispronunciations of words. Run-on and incomplete sentences are common, and the student's vocabulary is marked by the frequent use of words such as *things* and *stuff* rather than academic language. The student's voice is barely audible, and his or her stance is informal. The student makes no eye contact and uses no pictures or illustrations. | The student speaks in a mixture of academic and conversational language with mispronunciations of words. Most of the student's sentences are simple or run-on sentences, and his or her vocabulary is primarily conversational with little use of academic language. Content includes irrelevant facts. The student's voice is soft and hard to hear, and his or her stance is informal. The student makes no eye contact even when pictures or illustrations are not being used. | The student speaks clearly and uses academic language with minimal mispronunciations of words. His or her sentences are complete. The student's vocabulary is appropriate for the audience and content, and he or she demonstrates understanding of the content by answering questions. The student's voice is clear and loud enough to be heard by everyone most of the time, and he or she stands straight but makes limited eye contact. The student also uses little or no pictures or illustrations to make ideas clear. | The student speaks clearly and distinctly using academic language and complete sentences. The student's vocabulary is appropriate for the grade level, audience, and content. The student also demonstrates understanding of the content by answering questions. The student's voice is clear and loud enough to be heard by everyone, and he or she stands straight and makes eye contact. The student also uses pictures or illustrations to help make ideas clear. |

# Prosody Rubric

## Figure 4
## Multidimensional Fluency Scale

Use the following scales to rate reader fluency on the dimensions of expression and volume, phrasing, smoothness, and pace. Scores range from 4 to 16. Generally, scores below 8 indicate that fluency may be a concern. Scores of 8 or above indicate that the student is making good progress in fluency.

| Dimension | 1 | 2 | 3 | 4 |
|---|---|---|---|---|
| A. Expression and Volume | Reads with little expression or enthusiasm in voice. Reads words as if simply to get them out. Little sense of trying to make text sound like natural language. Tends to read in a quiet voice. | Some expression. Begins to use voice to make text sound like natural language in some areas of the text, but not others. Focus remains largely on saying the words. Still reads in a quiet voice. | Sounds like natural language throughout the better part of the passage. Occasionally slips into expressionless reading. Voice volume is generally appropriate throughout the text. | Reads with good expression and enthusiasm throughout the text. Sounds like natural language. The reader is able to vary expression and volume to match his/her interpretation of the passage. |
| B. Phrasing | Monotonic with little sense of phrase boundaries, frequent word-by-word reading. | Frequent two- and three-word phrases giving the impression of choppy reading; improper stress and intonation that fail to mark ends of sentences and clauses. | Mixture of run-ons, mid-sentence pauses for breath, and possibly some choppiness; reasonable stress/intonation. | Generally well phrased, mostly in clause and sentence units, with adequate attention to expression. |
| C. Smoothness | Frequent extended pauses, hesitations, false starts, sound-outs, repetitions, and/or multiple attempts. | Several "rough spots" in text where extended pauses, hesitations, etc., are more frequent and disruptive. | Occasional breaks in smoothness caused by difficulties with specific words and/or structures. | Generally smooth reading with some breaks, but word and structure difficulties are resolved quickly, usually through self-correction. |
| D. Pace (during sections of minimal disruption) | Slow and laborious. | Moderately slow. | Uneven mixture of fast and slow reading. | Consistently conversational. |

*Source:* Adapted from "Training Teachers to Attend to Their Students' Oral Reading Fluency," by J. Zutell and T. V. Rasinski, 1991, *Theory Into Practice, 30,* pp. 211-217.

# Looking at Fluency – The Gestalt

| Score | Accuracy | Rate (Pace) | Expression | |
|---|---|---|---|---|
| | | | **Structural** paraphrasing, pausing, smoothness, pitch, volume | **Interpretive** mood, purpose, emotion, subtleties of meaning |
| 4 | Recognizes most words and reads them correctly without hesitation. | Consistently reads at natural, conversational pace, or as appropriate for the text. | Reads smoothly. Consistently uses meaningful phrasing and appropriate pausing. Adjusts pitch and volume to the circumstances (type of text or audience). | Recognizes different purposes for reading. Consistently conveys the appropriate mood and emotion. Distinguishes word meanings in context. |
| 3 | Recognizes pre-taught and familiar words and reads them correctly. May hesitate, but can use context and apply word-attack skills. | Sometimes reads at a conversational pace, but is inconsistent. May speed up and slow down or generally read at a slightly slower pace. | Reads smoothly in general, but with some breaks or misuse of pausing. Is aware of pitch and volume. | Reads most text with appropriate emphasis for the purpose and mood of the text. May at times slip into concentrating on pronunciation, but will usually recover and resume once past the problematic area. |
| 2 | Recognizes and reads some words correctly, but hesitates. Has some difficulty using context clues and applying word-attack skills. | Reads somewhat slower than appropriate for text. May have stops and starts or have to go back and reread. | Reads unevenly. May miss punctuation clues resulting in choppiness or run-on reading. Does not generally attend to pitch and volume. | May use natural-sounding language at times, but in general, frequently resorts to focus on word-by-word pronunciation without regard for the mood, purpose, or intended meaning. |
| 1 | Misreads words frequently. May not recognize words in different contexts. Is not adept at applying word-attack skills. | Reading is slow and laborious. Frequently hesitates, stops, or goes back to "start over." | Does not usually read in meaningful units, such as phrases or clauses. May read word-for-word with little attention to context or punctuation signals. | Reading is generally monotone and lacks an awareness of mood, purpose, or emotion. May not recognize word meanings in context. |

# Prosody Checklist

*Place a +/- next to the behaviors that are used consistently while reading the selected text. If the behavior is not applicable, write N/A. Place number of + marks over the total observed on the progress monitoring protocol.*

| Present/Absent | Observable Behavior |
|---|---|
| | Placed vocal emphasis on appropriate words |
| | Voice tone rose and fell at appropriate points in the text. |
| | Inflection reflected the punctuation in the text (e.g., voice tone rose near the end of a question. |
| | In narrative text with dialogue: Appropriate vocal tone was used to represent characters' mental states, such as excitement, sadness, fear, or confidence |
| | Punctuation was used to pause appropriately at phrase boundaries |
| | Prepositional phrases were used to pause appropriately at phrase boundaries |
| | Subject-verb divisions were used to pause appropriately at phrase boundaries |
| | Conjunctions were used to pause appropriately at phrase boundaries |

Inquiry Rubric
From SRA: Imagine It!
Grades 1, 2, 3

| | 1 | 2 | 3 | 4 |
|---|---|---|---|---|
| Generating Ideas and Questions | The student does not initiate any wonderings or questions about the unit theme | With prompting, the student initiates wonderings about the unit theme and asks yes/no questions or factual questions. | The student initiates wonderings about the unit theme and asks a how or why question when prompted. | The student initiates wonderings about the unit theme and initiates how or why questions. |
| Formulating Conjectures | The student guesses at what the answer to the research question might be. | With prompting, the student completes a conjecture related to the research question. | The student understands what a conjecture is by explaining what a possible answer to the research question might be. | The student provides multiple conjectures connected to the research question. |
| Identifying Information Needs | The student is unable to identify appropriate resources for finding the answer to the research question. | The student identifies information needs and resources that many have information that addresses the research question. | The student identifies information needs and resources that are related to the research question. | The student identifies information needs that support and are directly related to the research question. |
| Collecting Information | The student is unable to identify and collect information related to the research question. | The student collects some information related to the unit theme, but not to the research question. | The student collects information from more than one resource, and most of the information is directly related to the research question. | The student collects information from multiple and varied resources that directly relate to the research question. |
| Confirming and Revising Conjectures | The student is unable to connect new information with the conjecture. | With support, the student recognizes that the new information should be used to evaluate the conjecture. | The student recognizes that the conjecture should be revised in light of new information. | The student uses new information to revise the conjecture. |
| Sharing Knowledge | The student is unable to present any new information about the research question or unit theme. | The student presents information that others have already shared about the research question. | The student shares information that no one else in the class has shared that addresses the research question. | The student presents new information that specifically addresses the research question and explains how it connects to |

| | | | | |
|---|---|---|---|---|
| | | | | the conjecture. |
| Overall Research | The student's overall research is a collection of facts that may or may not be related to the research question or conjecture. | The student's overall research is a collection of facts loosely related to the research question or conjecture. | The student's overall research is organized and clearly connected to the research question or conjecture, with some indication of progress toward answering the question and/or revising the conjecture. | The student's overall research is well planned, clearly organized and connected to the research question or conjecture, and leads to new knowledge about the research question. |

Inquiry Rubric
From SRA: Imagine It!
Grades 4 and 5

| | 1 | 2 | 3 | 4 |
|---|---|---|---|---|
| **Generating Ideas and Questions** | With help, the student identifies an idea or asks a question related to the unit theme. | With help, the student expresses curiosity about the unit theme and generates a question based on this. | The student identifies a problem or question for research and transforms it into a researchable question. | Independently, the student identifies an interesting problem and translates it into a researchable question. |
| **Formulating Conjectures** | The student guesses at what the answer to the research question might be. | The student offers conjectures that only partially address the research question. | The student offers conjectures that address the research question. | The student offers reasonable conjectures that address the question. |
| **Identifying Information Needs** | The student does not have a plan to identify resources related to the research question or conjecture, and he or she is unable to evaluate the appropriateness of resources. | The student identifies primary and secondary resources related to the unit theme, but he or she does not have a plan for identifying resources that specifically address the research question or conjecture. | The student has a plan to identify primary and secondary resources related to the research question or conjecture, and he or she can evaluate the appropriateness of those resources. | The student has a clear plan, including criteria for identifying and evaluating primary and secondary resources directly related to the research question and conjecture. |
| **Collecting Information** | The student collects information that is not related to the research question or conjecture. | The student collects general information related to the unit theme, but not directly related to the research question or conjecture. | The student collects information related to the research question or conjecture. | The student collects useful information, reviews it critically, puts the information in his or her own words, and pays attention to the reliability of sources. |
| **Confirming and Revising Conjectures** | The student is unable to evaluate his or her conjecture. | The student recognizes when a conjecture needs to be revised based on research findings. | The student uses new information to support, refute, or revise his or her conjecture. | The student continually revises his or her conjectures using research findings, data, and feedback from classmates. |

| | | | | |
|---|---|---|---|---|
| **Sharing Knowledge** | The student presents findings that are sparse or fragmentary, and there is no new knowledge added to the class's understanding of the unit theme. | The student presents primarily lists of facts, and the information is not well organized or clearly connected to the conjecture. | The student uses new information to support original or revised conjecture. | In an organized format, the student's presentation of ideas engages the audience, provides a description of the research question and conjecture, and demonstrates how the conjecture was modified in light of new knowledge. |
| **Overall Research** | The student's overall research is a collection of facts that may or may not be related to the research question or conjecture. | The student's overall research is a collection of facts loosely related to the research question or conjecture. | The student's overall research is organized and clearly connected to the research question or conjecture, with some indication of progress toward answering the question and/or revising the conjecture. | The student's overall research is well planned, clearly organized and connected to the research question or conjecture, and leads to new knowledge about the research question. |

Education for Change Indicators of Six Principles Matrix

| | Examples in the Classrooms- All Settings | Examples in the Cafeteria | Examples in the Hallways | Examples on the Playground |
|---|---|---|---|---|
| Be Polite | Treat others with respect<br>Follow classroom procedures<br>Follow directions and classroom agreements<br>Use appropriate voice and language<br>Follow appropriate behaviors procedures<br>Respect the rights of those around you | Use 6 inch voices<br>Thank the cafeteria personnel daily<br>Use the recycling containers<br>Clean food spills off the floor<br>Clean tables for the next class | "Be polite- walk on the right!"<br>Open the doors for parents and visitors<br>Always walk in the building<br>Use 3 inch voices<br>Keep hands to yourself | Share playground equipment with others<br>Do not bother or hurt others<br>Include everyone in games<br>Resolve conflicts by talking not hitting<br>Use proper water fountain etiquette |
| Be Prompt | Arrive on time, ready to learn<br>Resolve attendance issues before instructional time begins (notes to the office, etc) | Don't delay while eating- be cognizant of the time<br>Follow systems in place in a timely fashion *(i.e. salad bar line)* | Walk with a sense of urgency in the hallway- instructional minutes are precious<br>Line up promptly when recesses are over | Report to consequence corner or to red-dot detention in a timely manner<br>"Powerwalk" to class when the bell rings |
| Be Prepared | Have all homework assignments completed<br>Listen with an open mind<br>Organize materials so that they are easy to find<br>Stay engaged and participate in classroom discussions<br>Maintain your school supplies and be prepared with ALL items<br>Always have your agenda ready<br>Be actively engaged in discussions and learning | Awareness of cafeteria rules<br>If you bring your lunch, be prepared to proceed to your assigned table upon arrival to the cafeteria<br>Pick up lunch card in a timely manner<br>Think about food selections while in line, so that the line moves smoothly<br>Sit at your assigned table with your classmates | Keep arms and legs to yourself<br>Be prepared to keep an arms length distance from the person in front of you while standing in line<br>Remember to use 3 inch voices as other classes are in session | Use equipment as it was designed<br>Be aware of Playworks systems and rules to resolve issues during games |

| | | | | |
|---|---|---|---|---|
| Be Proud | Wear your EFC uniform each and every day<br><br>Keep your learning environment organized and free of clutter<br><br>Lead by example<br><br>Enter and exit the classroom in an orderly fashion<br><br>Make choices that are best for you and the school.<br><br>Respect the other learners and their ideas | Make sure your table is clean before going outside.<br><br>Eat and drink so that you do not disturb anybody else. | Take your hat and/or hoodie off when entering the building<br><br>Walk with your chin up and a smile on your face | Report graffiti or broken equipment to playground duty personnel |
| Be Positive | Assume positive intent from your teacher and peers<br><br>Respect teacher/student relationships<br><br>Remind others to follow the rules<br><br>Remember that learning is YOUR right- enjoy every minute! | Be helpful to cafeteria staff<br><br>Have appropriate positive conversations at the table that will make your classmates feel good.<br><br>Avoid topics that could have a negative impact on others | Say hello to others and smile<br><br>Be a role model for a younger child | Encourage others<br><br>Practice good sportsmanship |
| Be Productive | Use time and school resources wisely<br><br>Stay seated in chairs and leave and return in an orderly and direct manner<br><br>Ask questions about specific items when you don't understand<br><br>Ask questions at appropriate times | Be helpful to cafeteria staff<br><br>Read a book quietly in times of inclement weather<br><br>Encourage your classmates to keep the tables and floors clean | Review your math facts or high-frequency words while walking to and from class- every minute at school is valuable | Use restroom during appropriate times- at recess and lunch<br><br>Return playground equipment in a timely manner<br><br>Participate in recess- it's good for you |

Strategy Rubric
From SRA: Imagine It!
Grade 1

| | 1 | 2 | 3 | 4 |
|---|---|---|---|---|
| Asking Questions | The student stops to ask questions-any question. | The student asks questions directly related to the text. | The student asks *who, what, why, when, where,* or *how* questions as opposed to *yes* or *no* questions. | The student asks questions that help clarify information in the text. |
| Clarifying | The student recognizes when a word or idea is not making sense. | That student uses decoding skills to read unfamiliar words. | The student uses structural elements in words to read them. | The student uses structural elements, context, and questioning to clarify the meanings of unfamiliar words. |
| Making Connections | The student makes connections between prior knowledge and information in the text. | The student makes connections between or relates personal experiences to what is read in the text (text-to-self connections). | The student makes connections across or relates information from different selections (text-to-text connections). | The student makes connections or relates information between what is happening in the text to what is happening in the world today (text-to-word connections). |
| Predicting | The student stops to make a prediction about the text. | The student identifies the clues in the text used to make a prediction. | The student uses clues in the text and prior knowledge to make a prediction. | The student recognizes when a prediction is or is not confirmed by the text. |
| Summarizing | The student retells information from the story. | The student paraphrases or puts the main ideas and details in his or her own words. | The student gives a summary that includes only the important or main ideas. | The student recognizes when the same ideas are included more than once in a summary and deletes them. |
| Visualizing | The student recognizes appropriate places in the text to stop and visualize. | The student visualizes literal ideas or scenes described by the author. | The student makes inferences while visualizing to show understanding of characters' feelings, mood, and setting. The visualization go beyond the author's literal words. | The student uses visualizing differently depending on the type of text (for example, characters, setting, and actions in narratives or process description in nonfiction). |

Strategy Rubric
From SRA: Imagine It!
Grades 2 and 3

| | 1 | 2 | 3 | 4 |
|---|---|---|---|---|
| Adjusting Reading Speed | The student knows the text is not making sense and stops to reread. | The student identifies the specific part of the text that is not making sense and rereads only that part. | The student changes reading speed in reaction to demands of the text. | The student adjusts reading rate to skim or scan for specific information. |
| Asking Questions | The student stops to ask questions-any question. | The student asks questions directly related to the text. | The student asks *who, what, why, when, where,* or *how* questions as opposed to *yes* or *no* questions. | The student asks questions that help clarify information in the text. |
| Clarifying | The student recognizes when a word or idea is not making sense. | That student uses decoding skills to read unfamiliar words. | The student uses structural elements in words to read them. | The student uses structural elements, context, and questioning to clarify the meanings of unfamiliar words. |
| Making Connections | The student makes connections between prior knowledge and information in the text. | The student makes connections between or relates personal experiences to what is read in the text (text-to-self connections). | The student makes connections across or relates information from different selections (text-to-text connections). | The student makes connections or relates information between what is happening in the text to what is happening in the world today (text-to-world connections). |
| Predicting | The student stops to make a prediction about the text. | The student identifies the clues in the text used to make a prediction. | The student uses clues in the text and prior knowledge to make a prediction. | The student recognizes when a prediction is or is not confirmed by the text. |
| Summarizing | The student retells information from the story. | The student paraphrases or puts the main ideas and details in his or her own words. | The student gives a summary that includes only the important or main ideas. | The student recognizes when the same ideas are included more than once in a summary and deletes them. |
| Visualizing | The student recognizes appropriate places in the text to stop and visualize. | The student visualizes literal ideas or scenes described by the author. | The student makes inferences while visualizing to show understanding of characters' feelings, mood, and setting. The visualizations go beyond the author's literal words. | The student uses visualizing differently depending on the type of text (for example, characters, setting, and actions in narratives or process description in nonfiction). |

Strategy Rubric
Form SRA: Imagine It!
Grade 4 & 5

| | 1 | 2 | 3 | 4 |
|---|---|---|---|---|
| **Adjusting Reading Speed** | The student knows the text is not making sense and stops to reread. | The student identifies the specific part of the text that is not making sense and rereads only that part. | The student changes reading speed in reaction to the demands of the text. | The student adjusts reading rate to skim or scan for specific information. |
| **Asking Questions** | The student asks *who, what, why, when, where,* or *how* questions as opposed to *yes* or *no* questions, and identifies when the answer is found in the text. | The student asks questions that help clarify information in the text. | The student asks questions that require drawing conclusions and making inferences. | The student asks questions that go beyond the text and connects the text to the unit theme. |
| **Clarifying** | The student uses structural elements, context, and questioning to read and clarify the meanings of unfamiliar words. | The student notes characteristics of the text such as whether it is difficult to read or whether some sections are more challenging or more important than others. | The student shows awareness of whether he or she understands the text and takes appropriate action, such as rereading, to understand the text better. | The student rereads to reconsider something presented earlier in the text. |
| **Making Connections** | The student makes connections between or relates personal experiences to what is read in the text (text-to-selfconnections). The student uses those personal experiences to explain something encountered in the text. | The student makes connections across or relates information within and across selections (text-to-text connections). | The student makes connections or relates information between what is happening in the text to what is happening in the world today (text-to-world connections). | The student notes ideas in the text that are new or conflict with what he or she previously thought. |
| **Predicting** | The student uses clues in the text and prior knowledge to make predictions. | The student recognizes when predictions are or are not confirmed by the text. | The student updates predictions during reading based on information in the text. | The student identifies why predictions were or were not confirmed. This identification includes missed clues in the text that would have helped make a better prediction. |

| | | | | |
|---|---|---|---|---|
| **Summarizing** | The student gives a summary that includes only the important or main ideas. | The student recognizes when the same ideas are included more than once in a summary and eliminates them. | The student draws conclusions from the text in the summary statement. | The student makes global interpretations of the text, such as recognizing how elements of the text fit the genre. |
| **Visualizing** | The student recognizes appropriate place in the text to stop and visualize. | The student visualizes literal ideas or scenes described by the author. | The student makes inferences while visualizing to show understanding of characters' feelings, mood, and setting. The visualizations go beyond the author's literal words. | The student uses visualizing differently depending on the type of text (for example, characters, setting, and actions in narratives or process description in nonfiction). |

Education for Change

Dear OUSD Board and members of the Oakland Community:

We the undersigned are members of the staff at Cox Academy Charter School. We want to express our support for the renewal of the Cox Academy charter petition. As the support staff members, we have seen one another's commitment to our students as well as that of the teachers and administrators at Cox Academy.

Over the past several years we have seen significant student growth and improvement in our school. Students are safe and happy. Teachers take an interest in each student, and there has been a notable improvement in academics and behavior since the first year of our charter.

We believe that it is extremely important to provide stability for our students. Most of us live in Oakland, and we all understand how important it is to have caring, consistently available adults to help support and guide the development of our children.

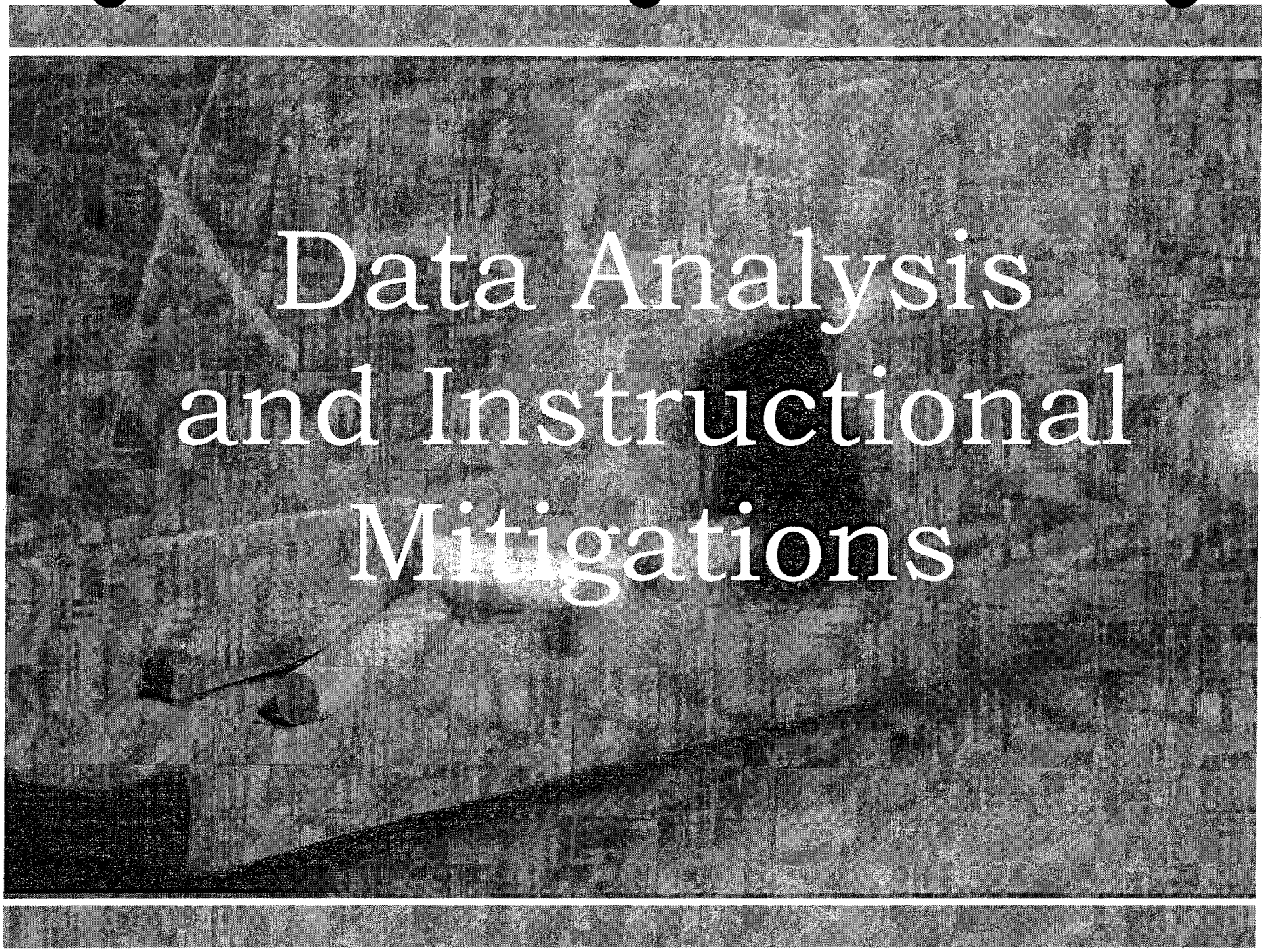
If you visit our school and talk with us, we think you will see how we all work together to make sure we keep our students safe, support their learning, and help them to achieve their potential,

We look forward to the opportunity to continue to serve our students, and to continually make gains, until each and every one of our students is successful.

We represent 100% of the Cox Academy classified staff.

Sincerely,

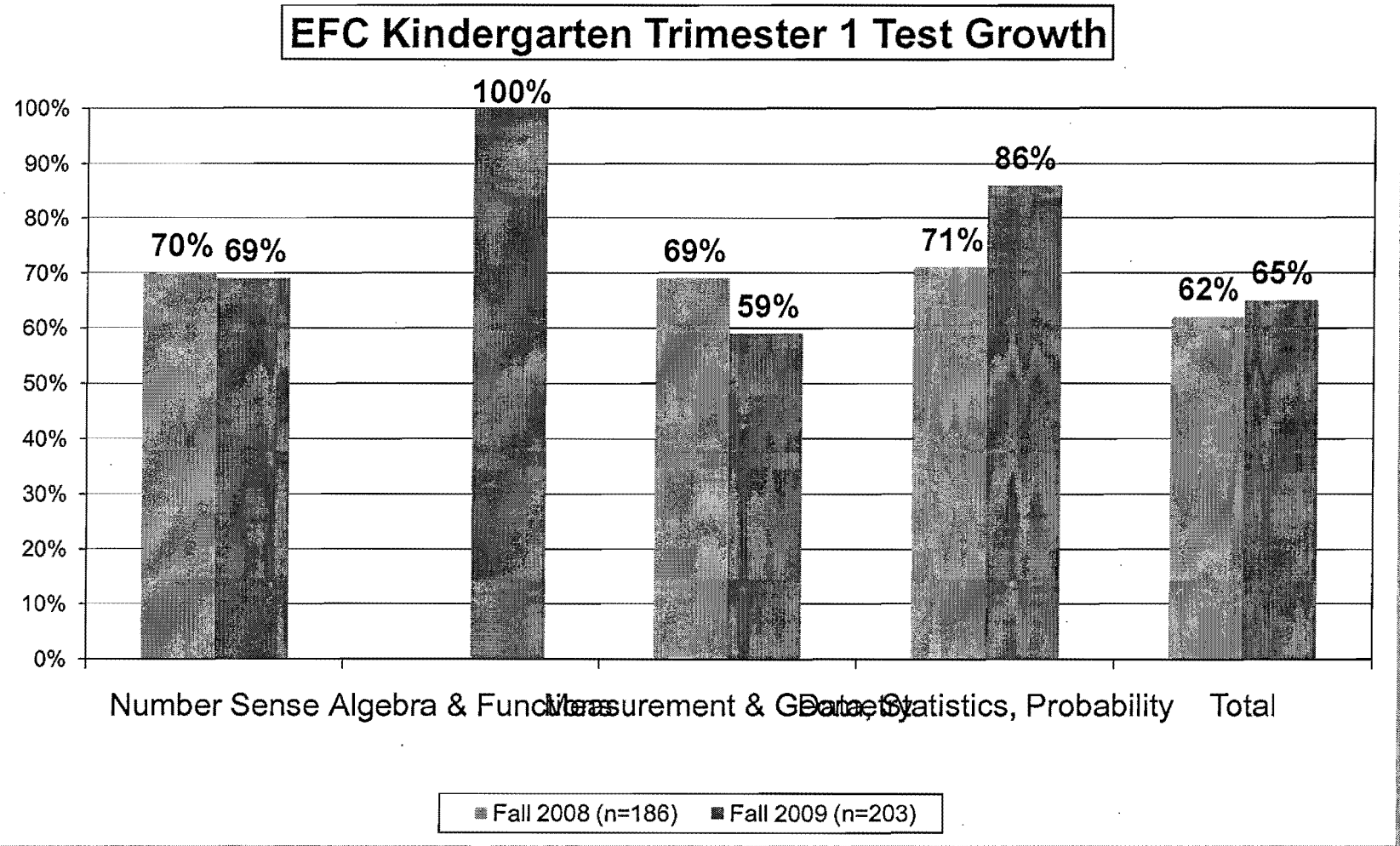
1
2 Kimberly Powell
3 Leslie Peña
4 Methy Jenkins
5 NELSON LANDAVERDE
6
7 Judy McCrary
8
9
10
11 Maricela Avalos
12 Cristen
13
14 Teresa George


Data Analysis
and Instructional
Mitigations

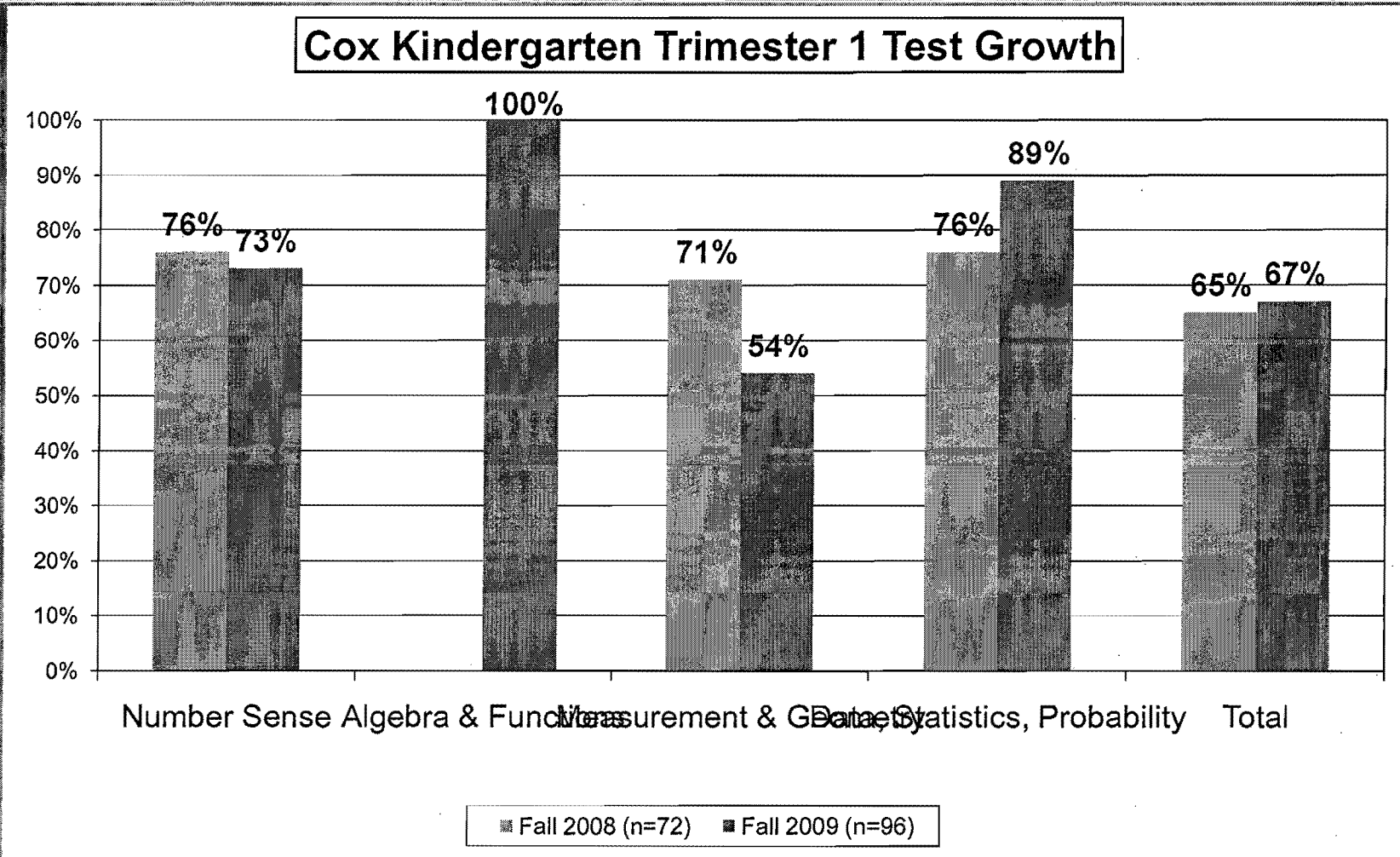
# Overview

- Data Discussion
- Choosing Focus Areas
- Planning Instructional Mitigation

# District Data – EFC Kindergarten



# District Data – Cox Kindergarten



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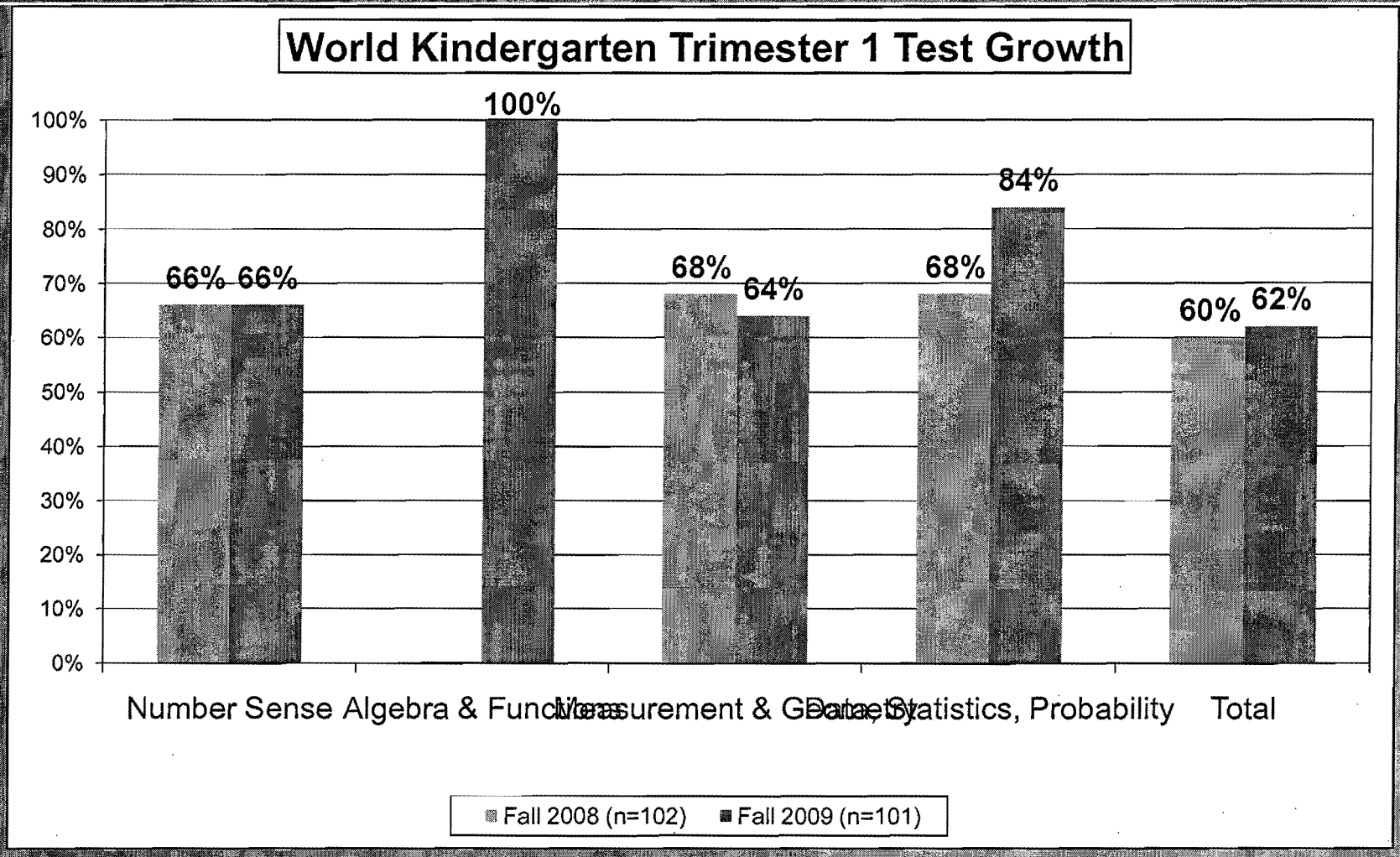
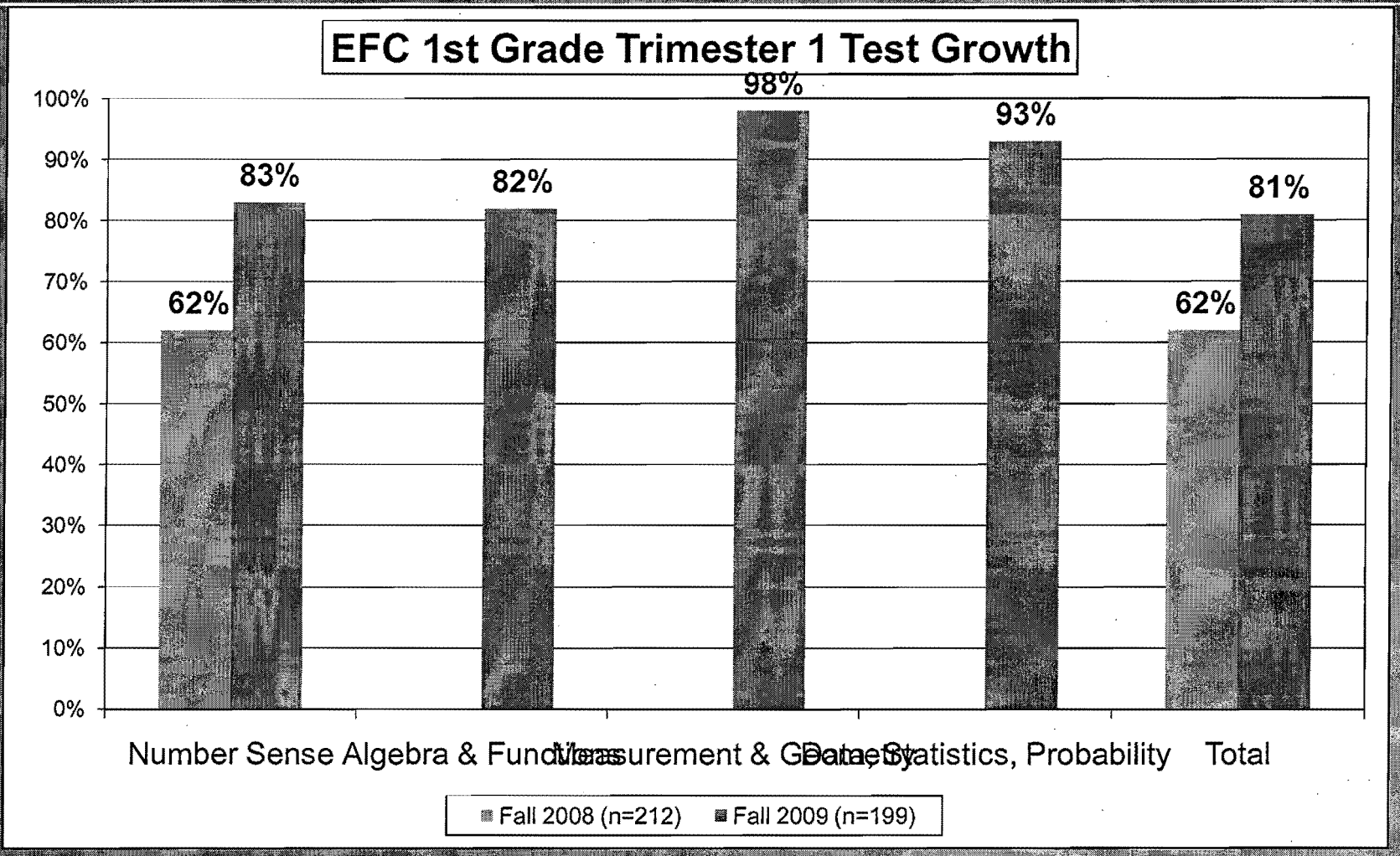


# District Data – EFC 1st Grade



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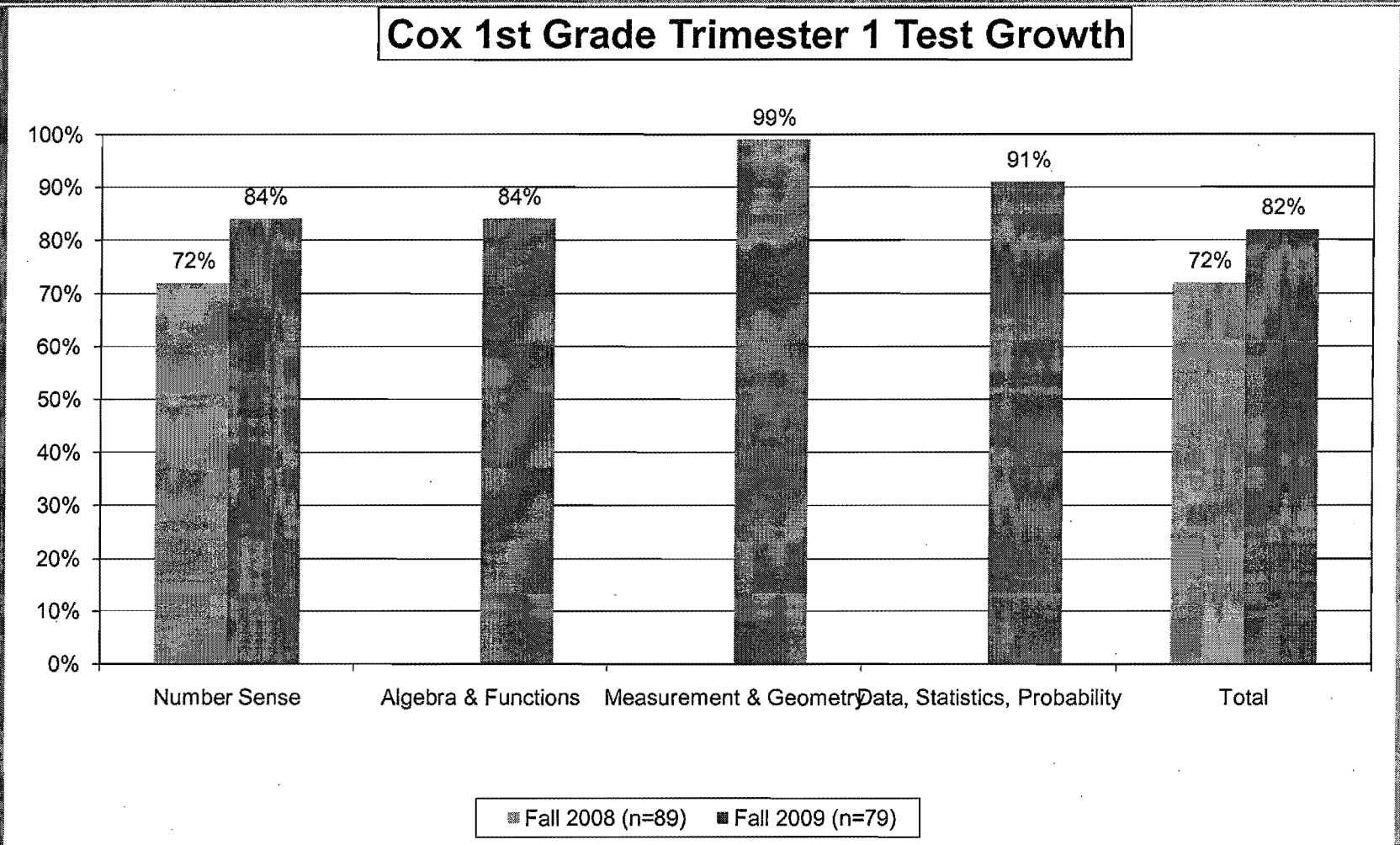

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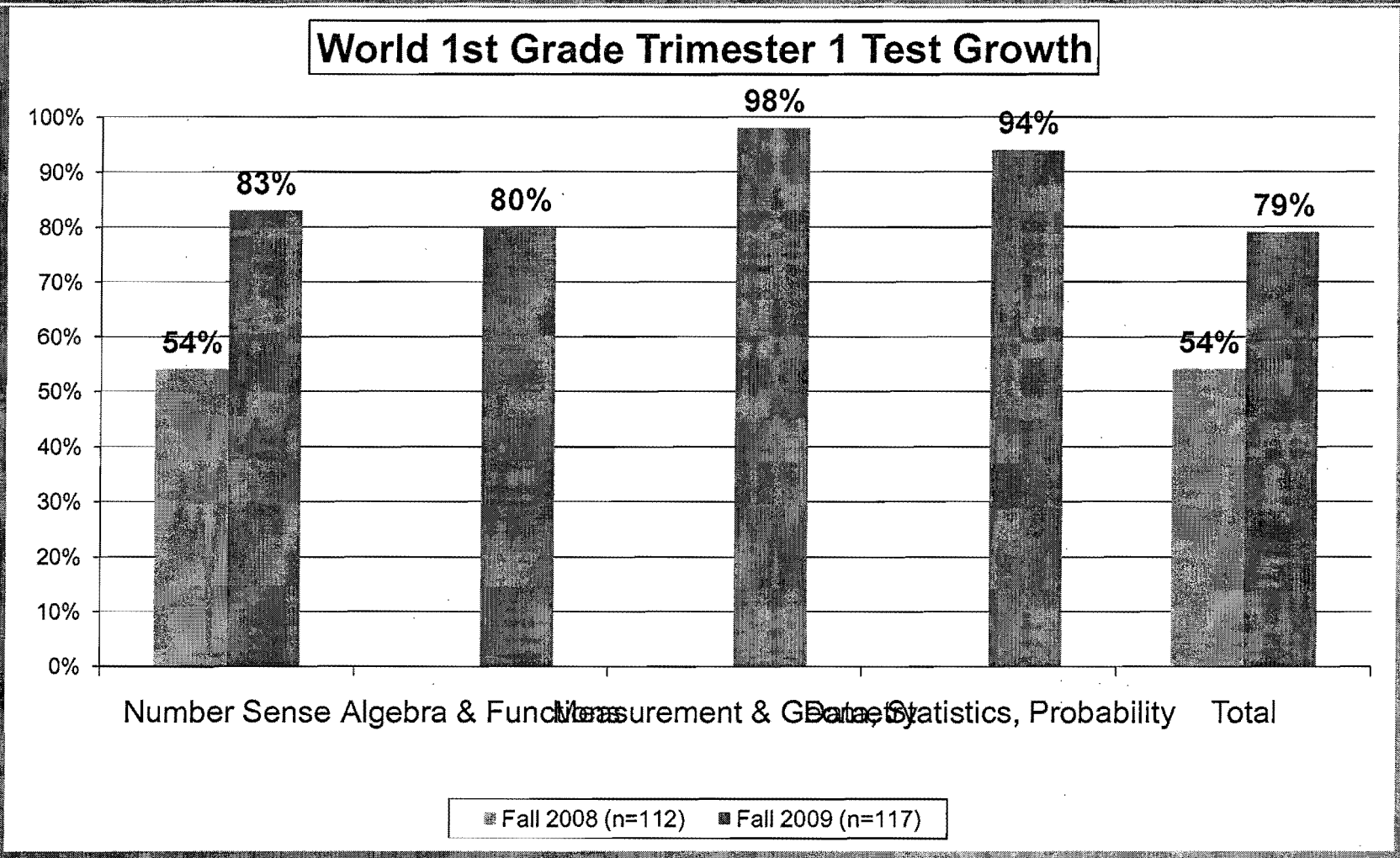

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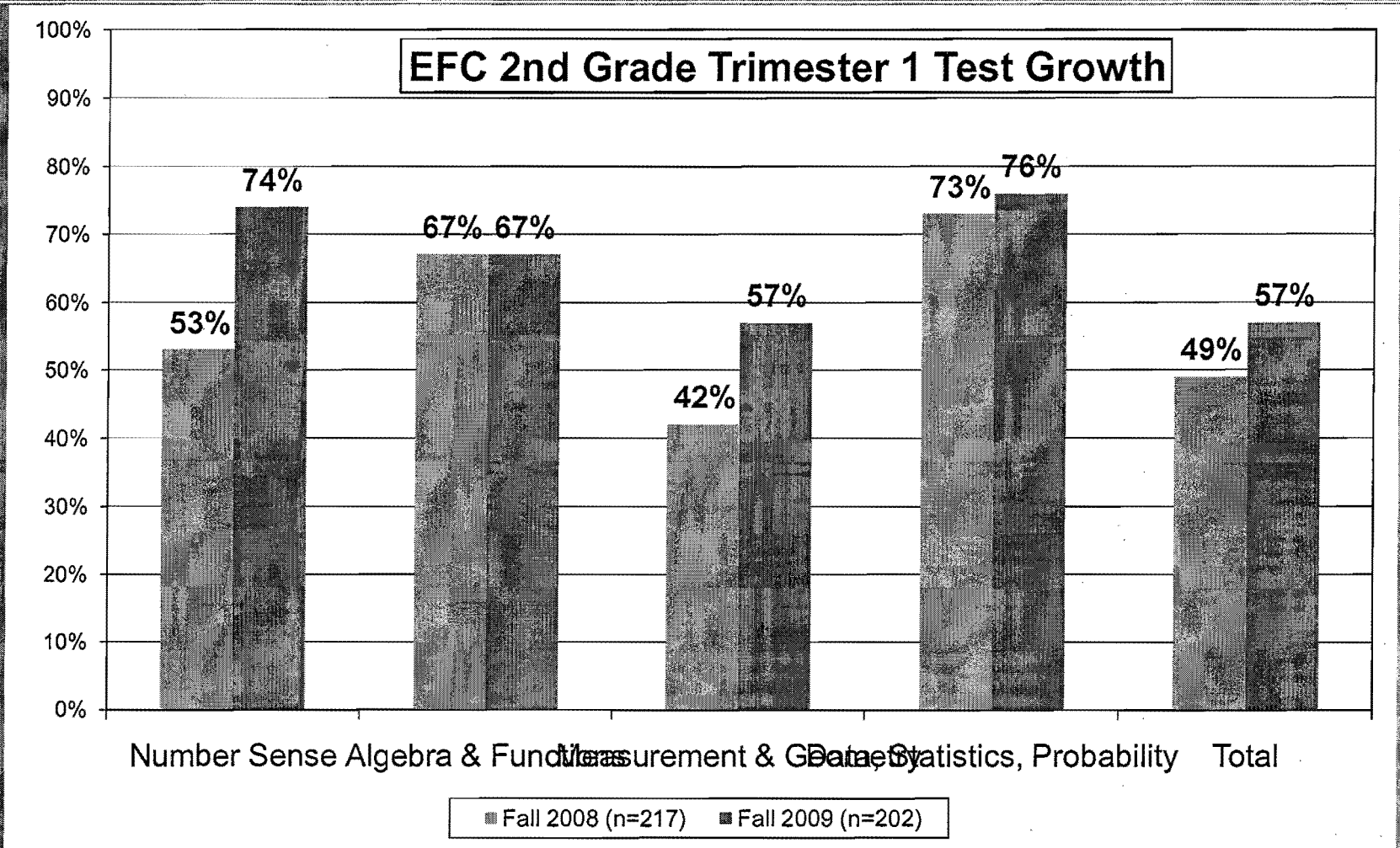

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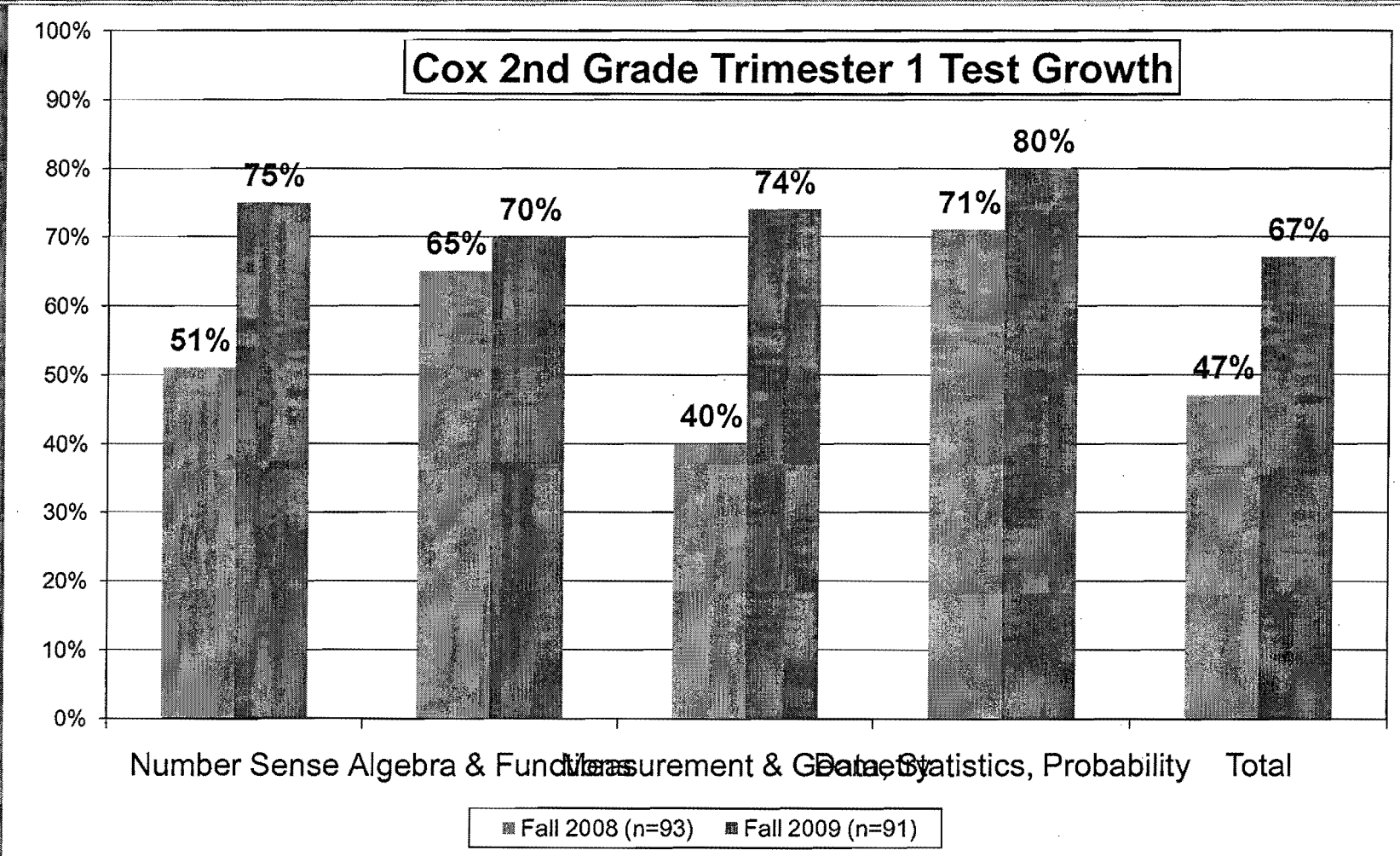

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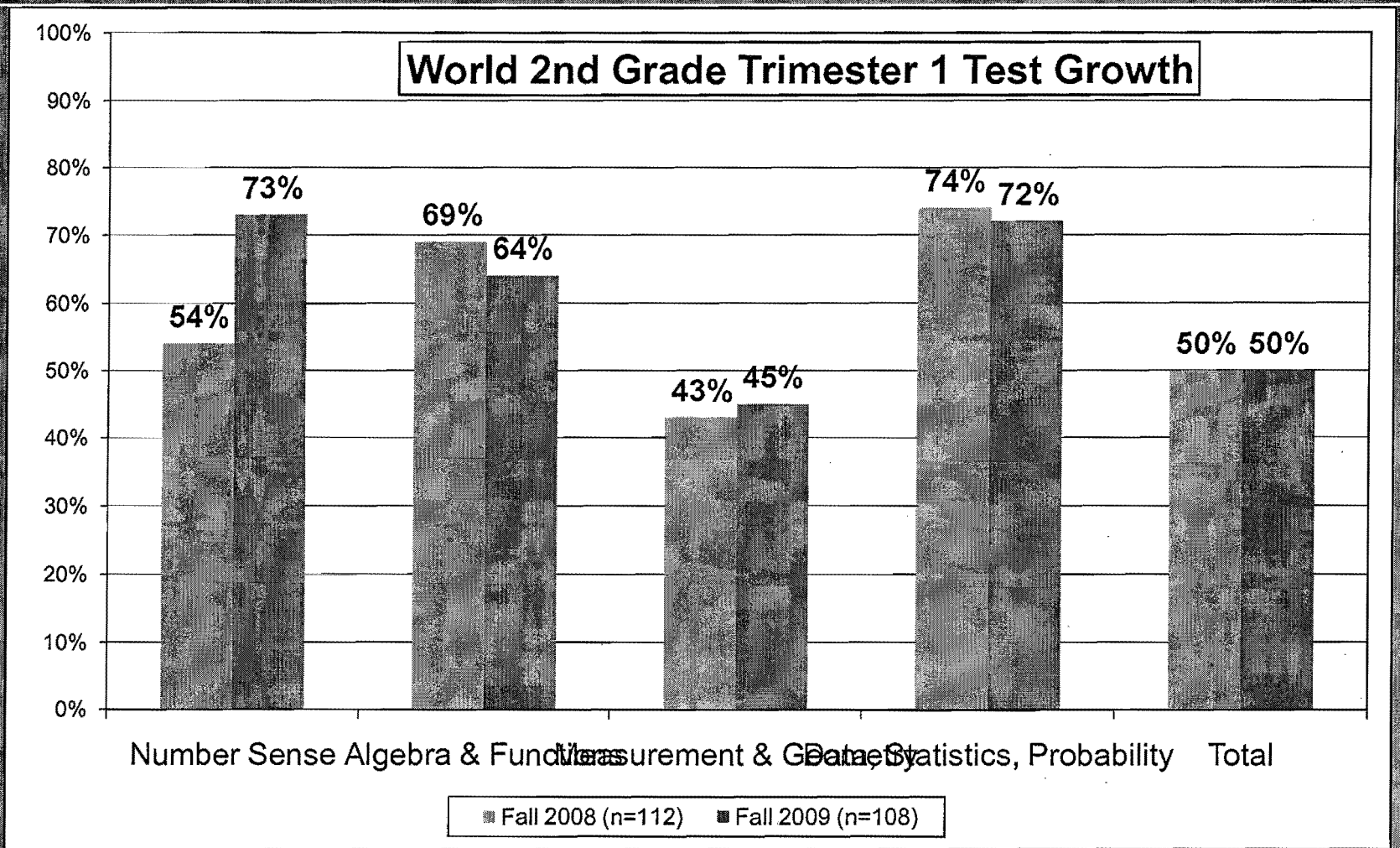

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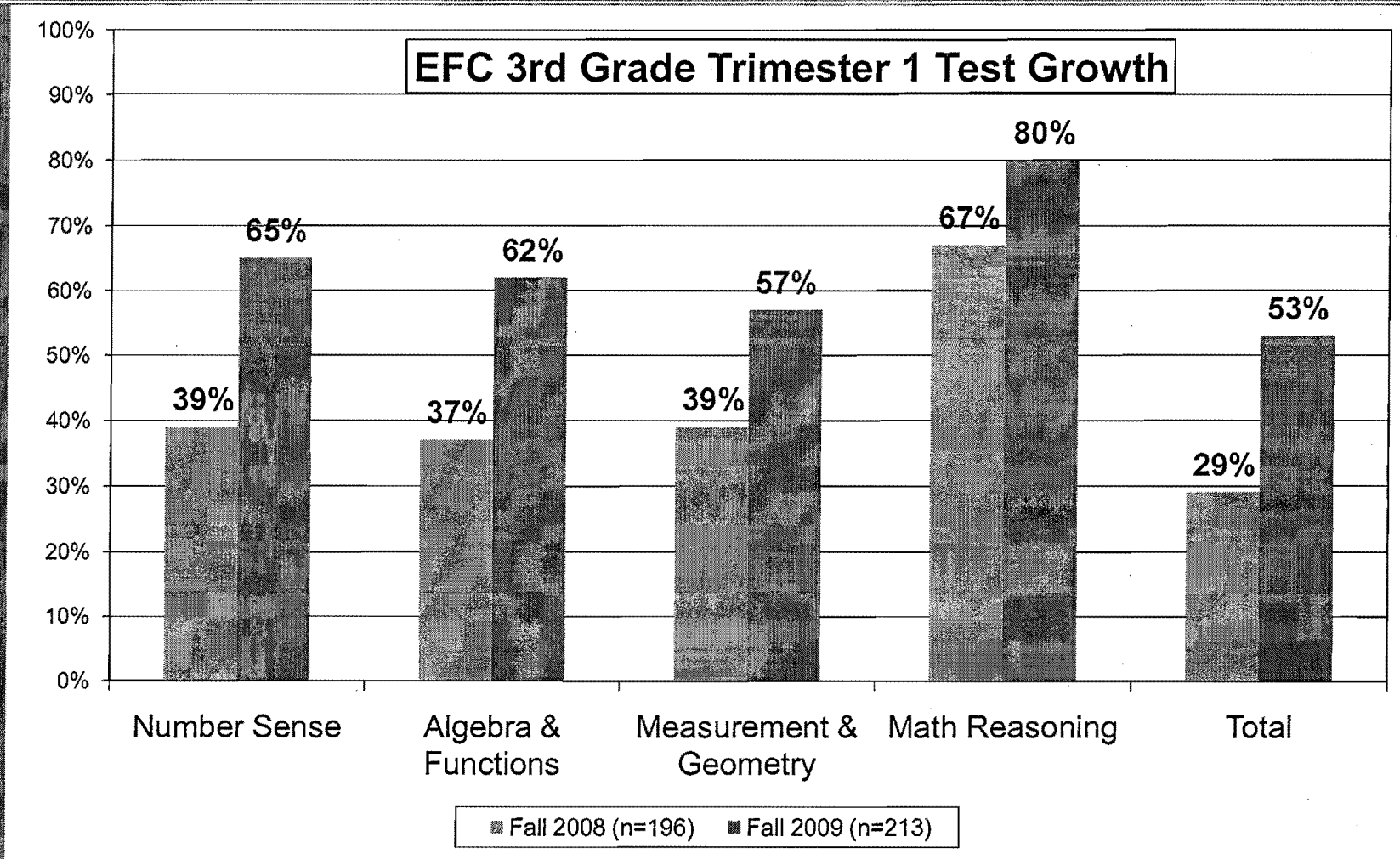

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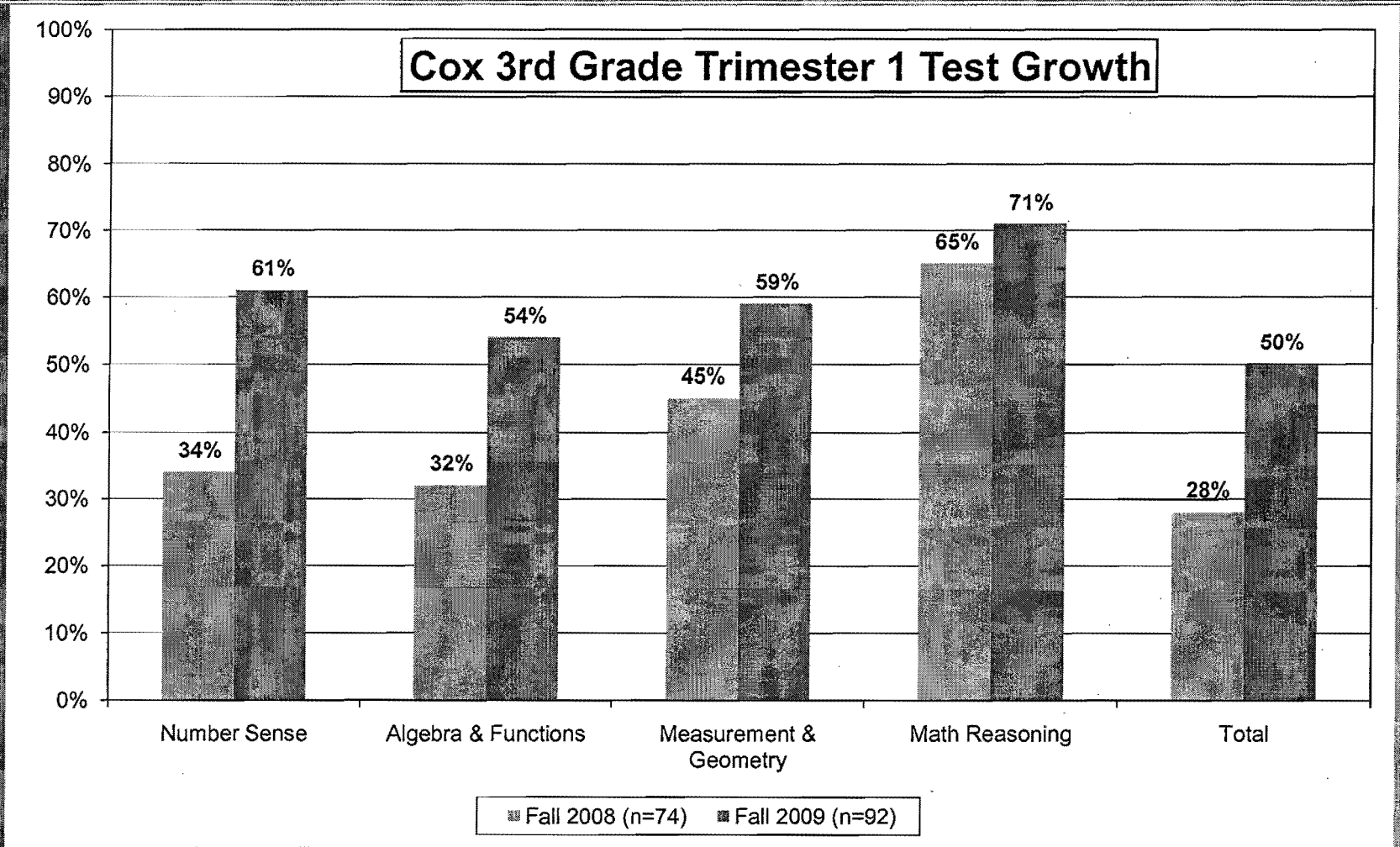

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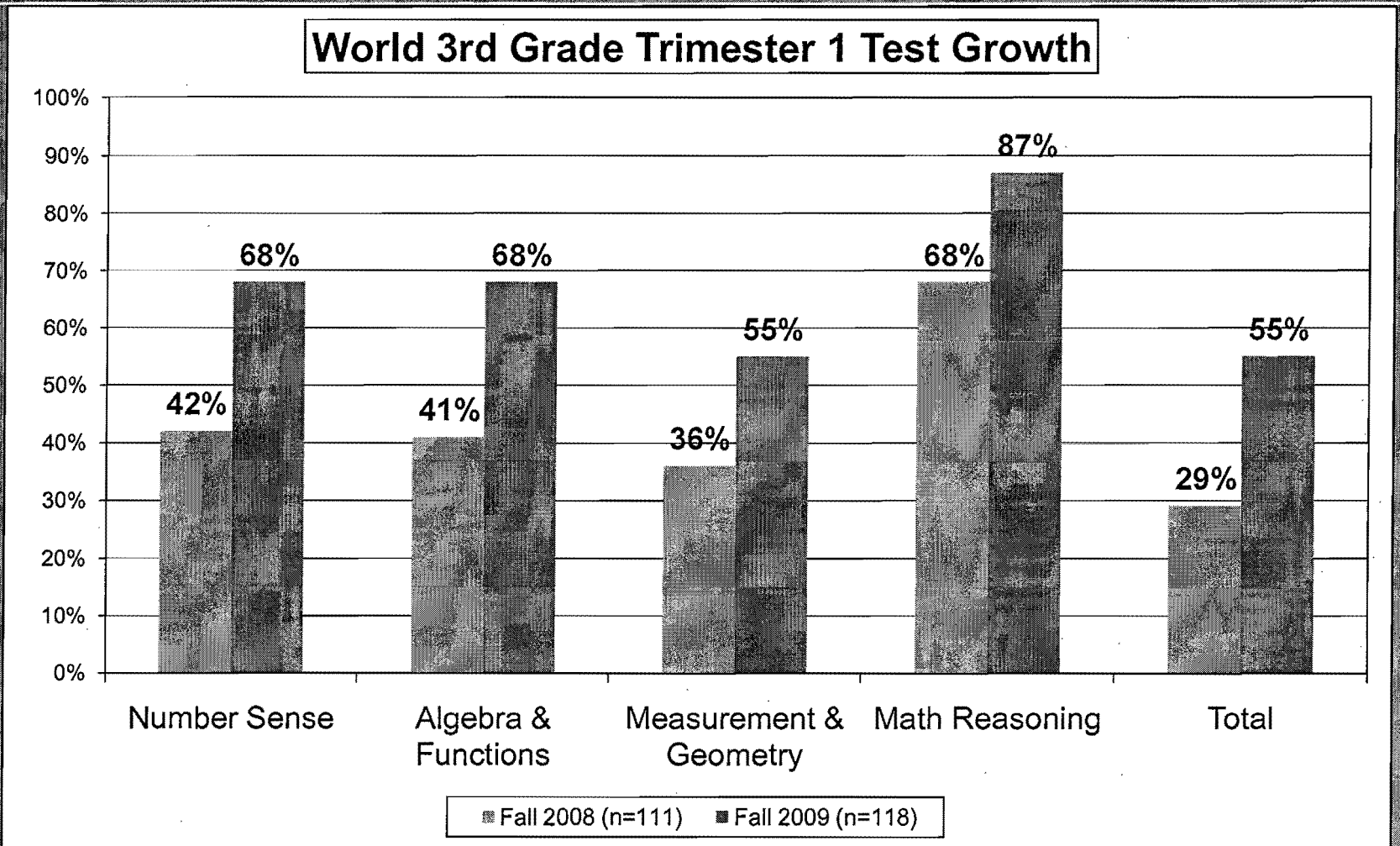

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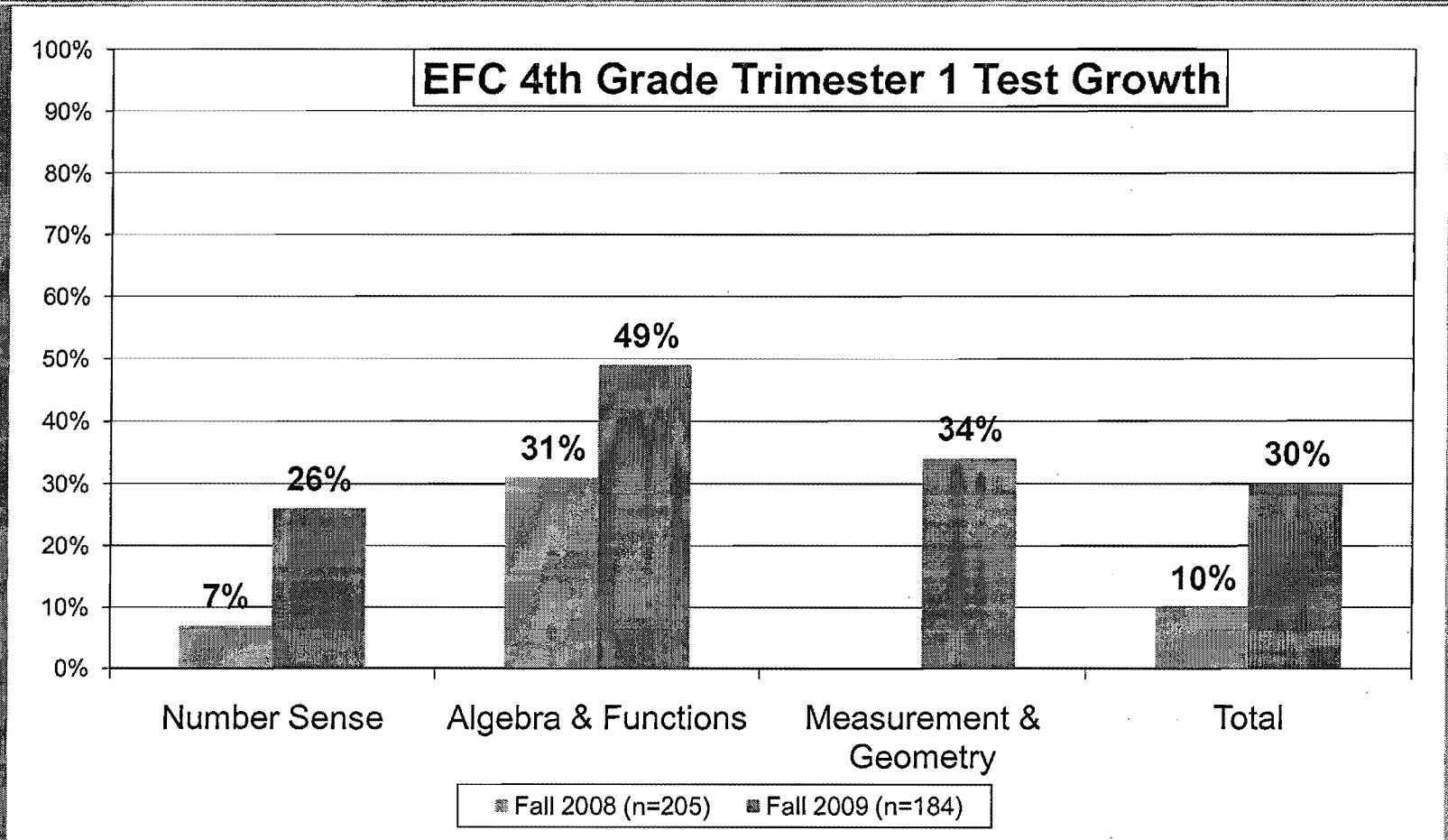
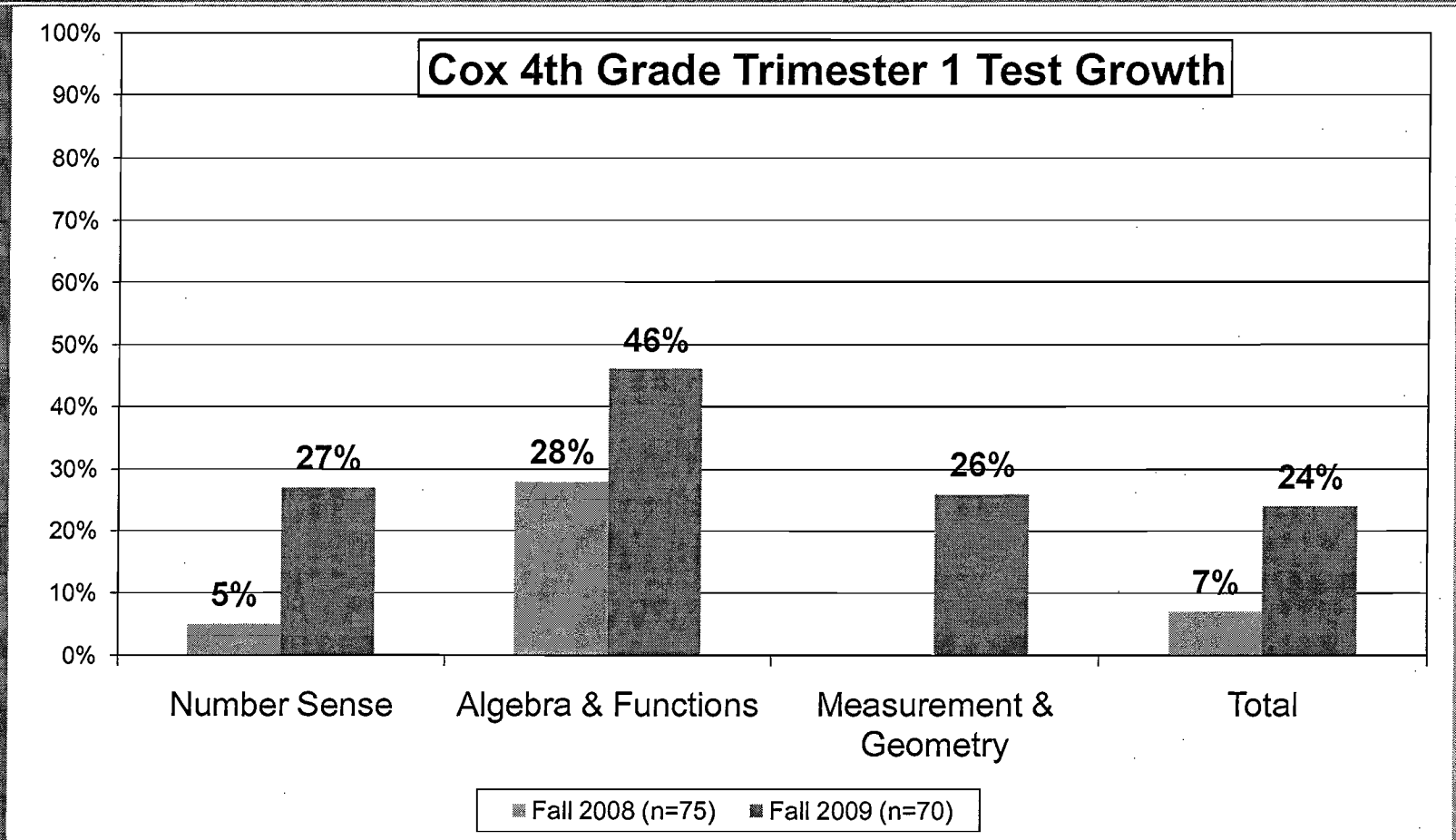
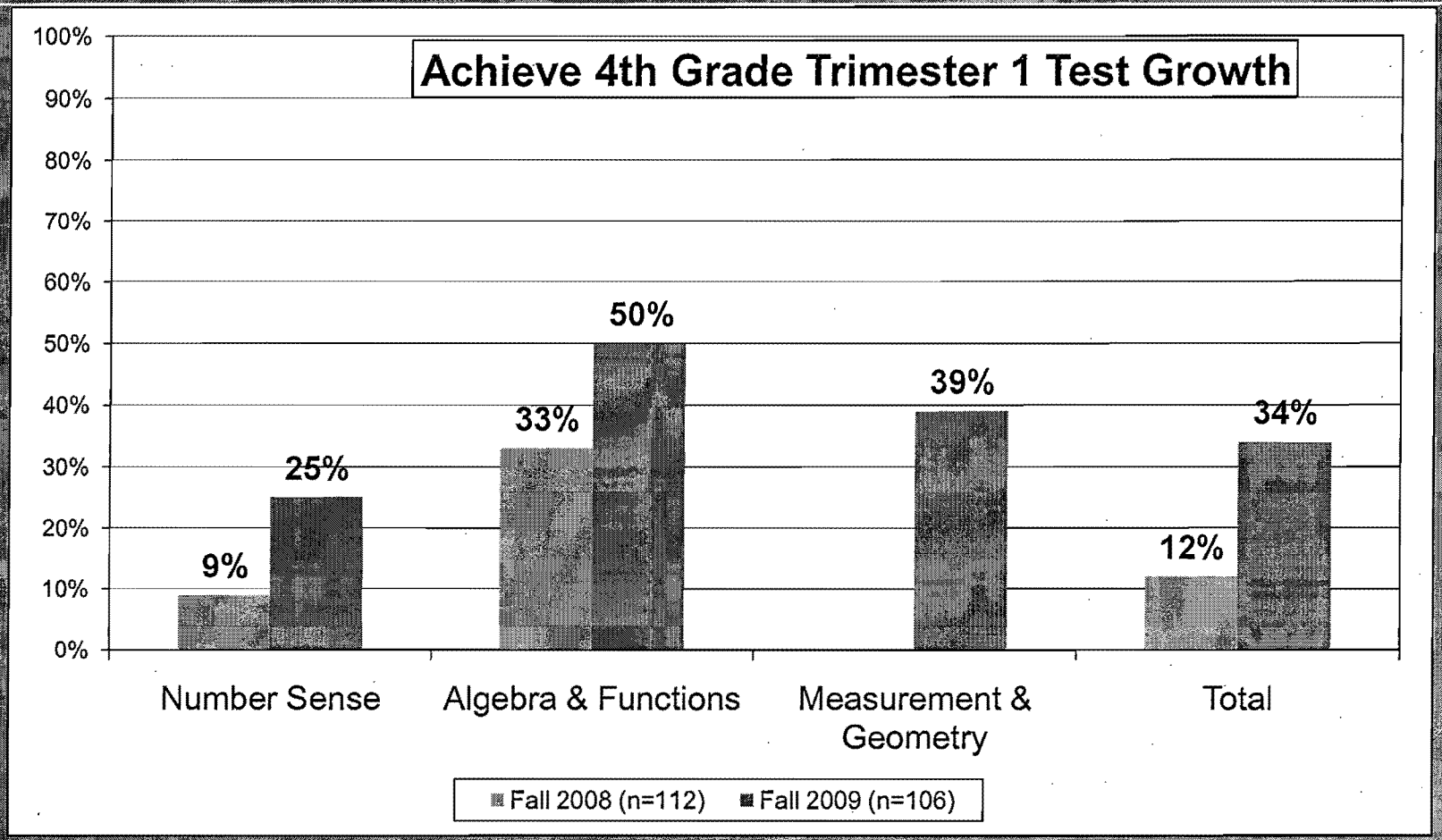


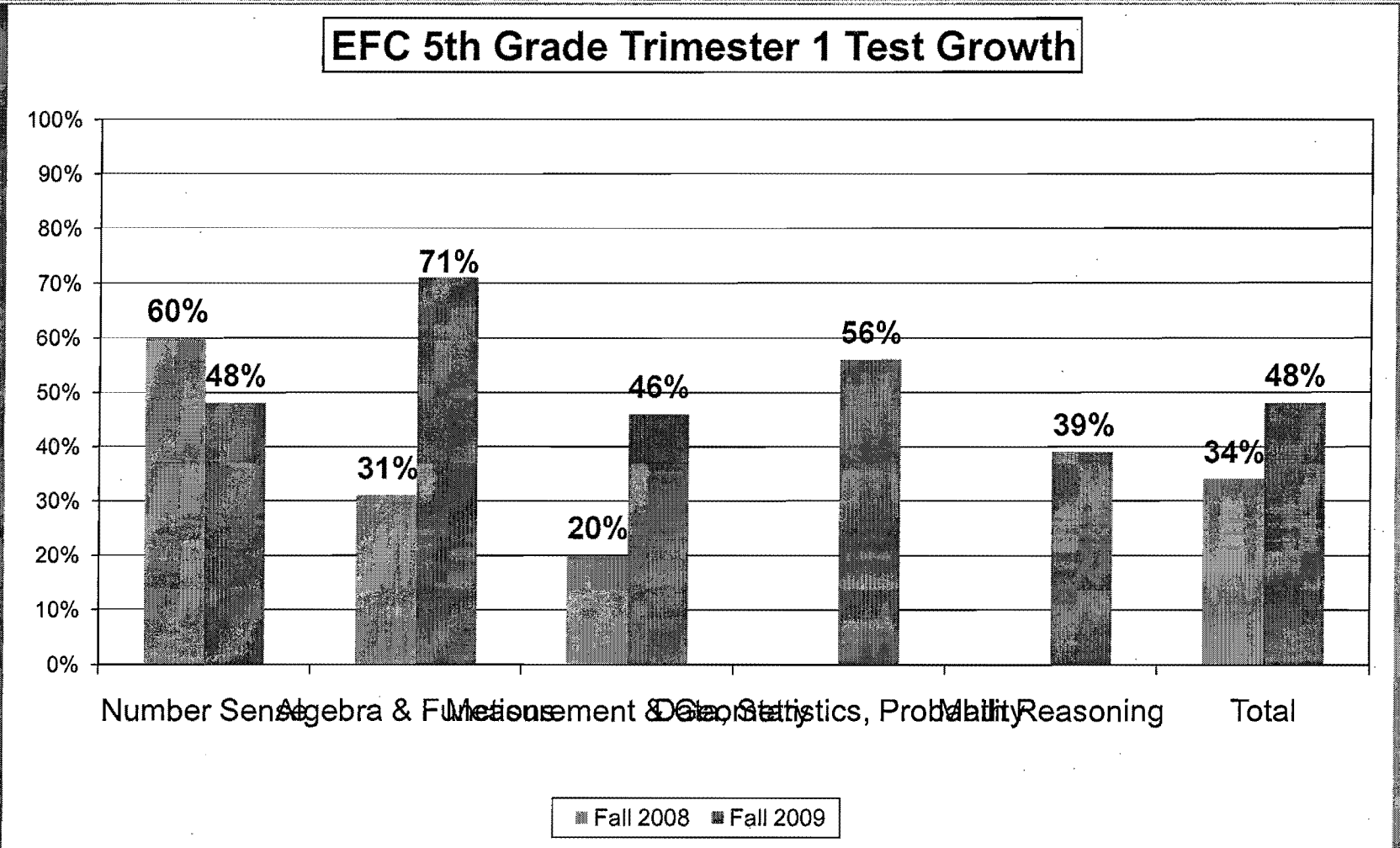
# District Data – Cox 4th Grade



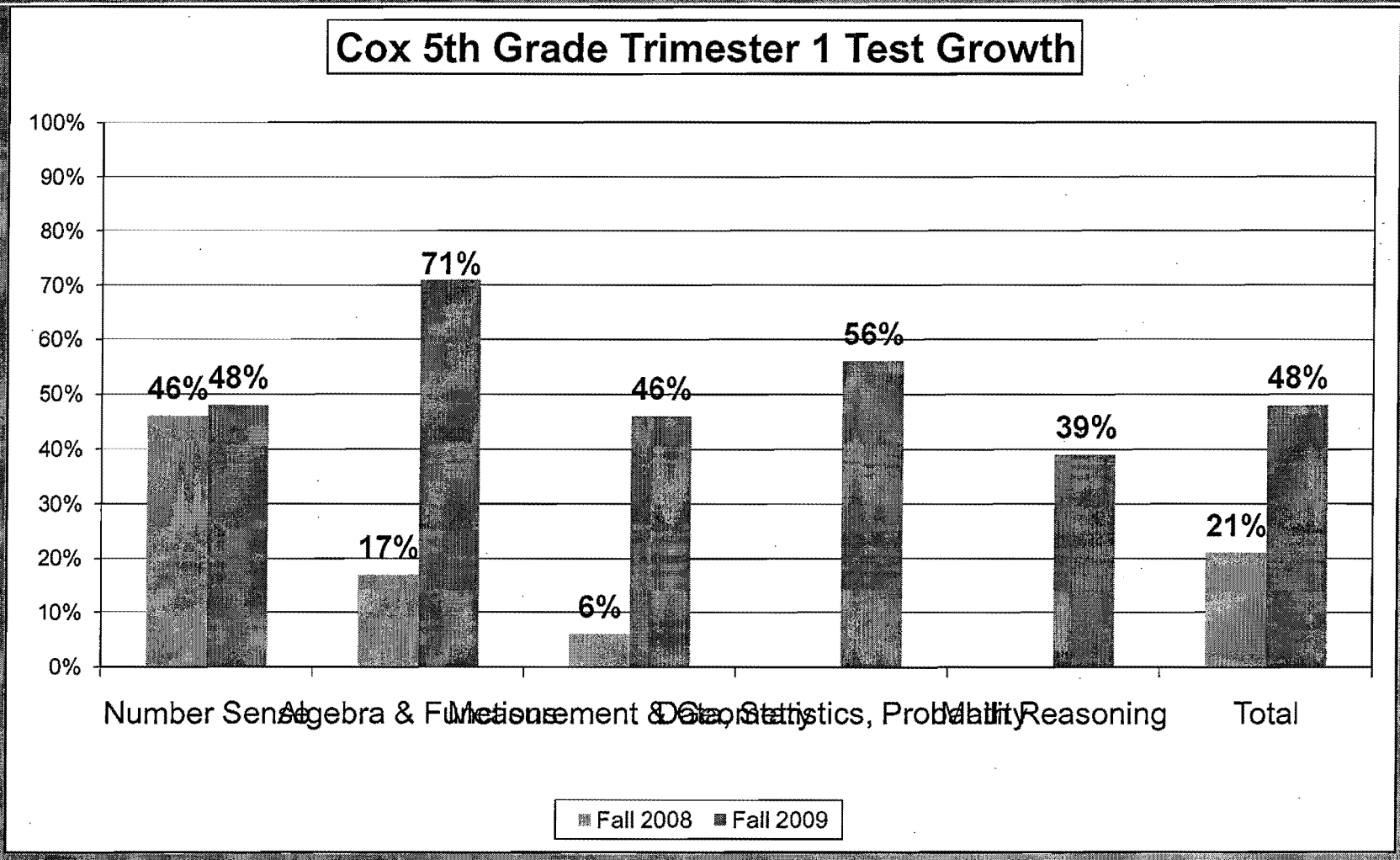
# District Data – Achieve 4th Grade



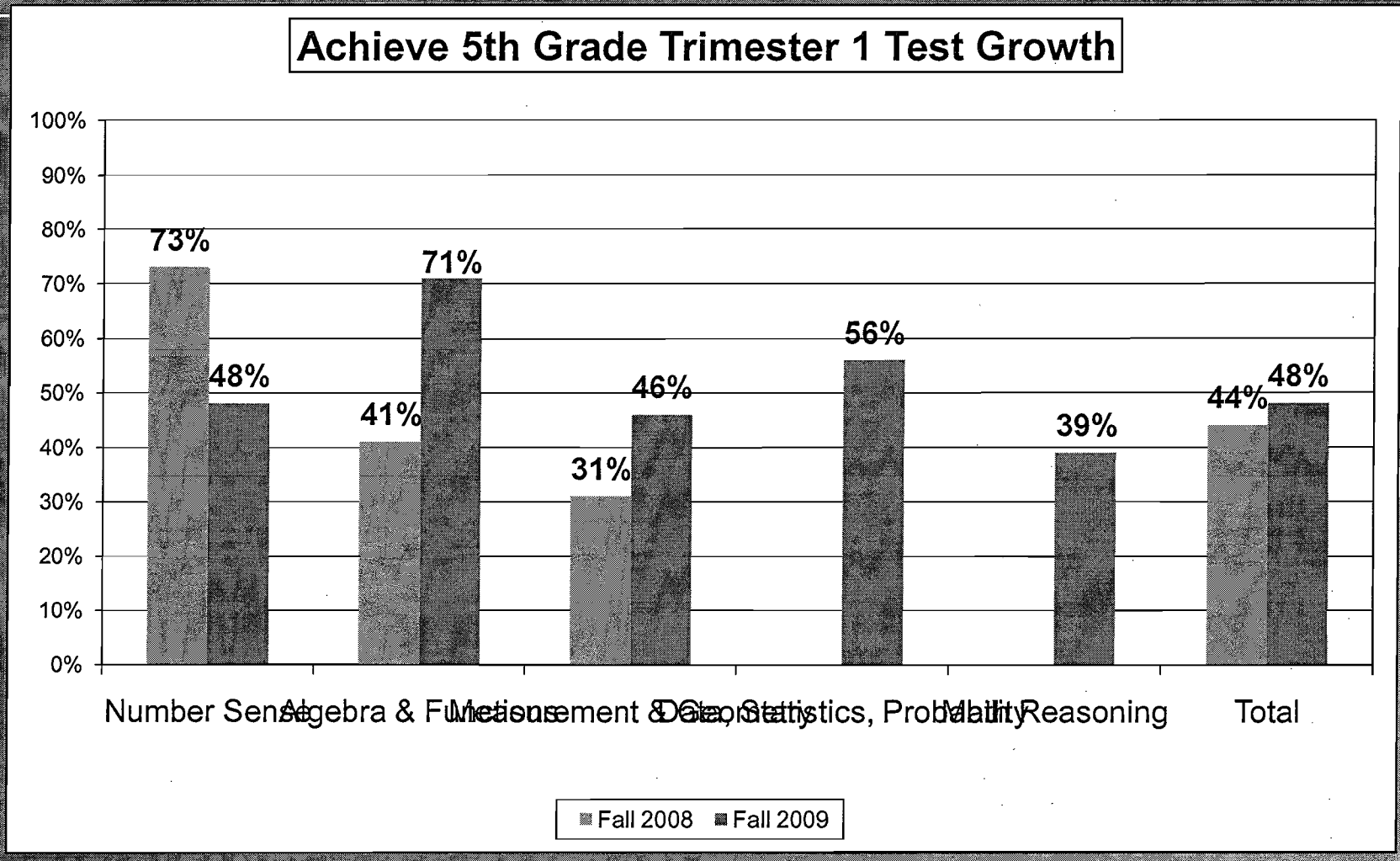
# District Data – EFC 5th Grade



# District Data – Cox 5th Grade



# District Data – Achieve 5th Grade



# Data Discussion

- Look at the latest data.
- Where were your students successful?
- Why do you think they were successful? What did you do and how did you do it?

## Item Analysis Results

**School Year: 2009-2010**
**Assessment Year: 2009-2010**
**Assessment: Math, Grade 3, Trimester 1**
**Report Level: District**
**Timestamp: December 15, 2009 at 01:35:50 PM**
**Departments: All**

Filter by Department

| Question Number | State Standard | Responses A | B | C | D | Blanks & Mult. Marks | Percent Answering Correctly |
|---|---|---|---|---|---|---|---|
| 1. | NS 1.1 | 11 | 5 | 8 | 183 | 0 | 88 % |
| 2. | NS 1.1 | 3 | 1 | 54 | 149 | 1 | 72 % |
| 3. | NS 1.1 | 147 | 37 | 22 | 10 | 1 | 71 % |
| 4. | NS 1.1 | 4 | 192 | 9 | 3 | 0 | 92 % |
| 5. | NS 1.1 | 17 | 171 | 14 | 3 | 0 | 84 % |
| 6. | NS 1.2 | 7 | 169 | 17 | 13 | 2 | 81 % |
| 7. | NS 1.2 | 28 | 24 | 16 | 135 | 5 | 65 % |
| 8. | NS 1.3 | 15 | 179 | 9 | 5 | 0 | 86 % |
| 9. | NS 1.3 | 12 | 6 | 170 | 20 | 0 | 82 % |
| 10. | NS 1.3 | 15 | 155 | 28 | 10 | 0 | 75 % |
| 11. | NS 2.1 | 18 | 159 | 25 | 6 | 0 | 76 % |
| 12. | AF 2.2 | 5 | 5 | 3 | 195 | 0 | 94 % |
| 13. | AF 2.2 | 148 | 4 | 7 | 49 | 0 | 71 % |
| 14. | AF 2.2 | 27 | 122 | 28 | 31 | 0 | 59 % |
| 15. | AF 2.2 | 12 | 17 | 124 | 55 | 0 | 60 % |
| 16. | MG 2.1 | 165 | 28 | 12 | 3 | 0 | 79 % |
| 17. | MG 2.1 | 20 | 159 | 17 | 12 | 0 | 76 % |
| 18. | MG 2.1 | 4 | 190 | 10 | 4 | 0 | 91 % |
| 19. | MG 2.1 | 62 | 98 | 27 | 20 | 1 | 47 % |
| 20. | MG 2.2 | 2 | 6 | 176 | 24 | 0 | 85 % |
| 21. | MG 2.2 | 19 | 180 | 2 | 7 | 0 | 87 % |
| 22. | MG 2.1 | 46 | 15 | 144 | 3 | 0 | 69 % |
| 23. | MR 1.1 | 6 | 179 | 21 | 2 | 0 | 86 % |
| 24. | MR 1.1 | 7 | 7 | 169 | 25 | 0 | 81 % |
| 25. | MR 2.3 | 9 | 59 | 106 | 23 | 1 | 51 % |

## Summary

| | |
|---|---|
| **Average Percent Correct** | 76.3% |
| **Percent of Students at or above %** | *Enter a value to view data* |

# Grade Level Data Analysis and Instructional Mitigation Form

**GRADE LEVEL DATA ANALYSIS AND INSTRUCTIONAL MITIGATIONS**

School: EFC Grade level: 3 Assessment: Trimester 1 Test

Participants: Arantxa Alvarez Francis Abbatantuono

**DATA ANALYSIS AND TARGET GOALS**

After reviewing our grade level data, we believe that the data demonstrates that we are **succeeding** in:

| **Area of success** | **Evidence (i.e., ____ out of _____ students are at or above benchmark, _____ % of students moved from intensive to strategic)** | **What is your hypothesis about why the data looks the way it does?** |
|---|---|---|
| # 4, NS 1.1 Writing numbers in standard form. | 192 out of 208 students are at or above benchmark, 92% of students. | During math meeting we added a component where we write numbers in written, standard, and expanded form. |
| # 12, AF 2.2 Extending a linear pattern . | 195 out of 208 students are at or above benchmark, 94% of students. | During math meeting we cover extending patterns everyday. |
| | | |
| | | |
| | | |
| | | |

# Data Discussion

- What were the challenges?
- Why do you think this was challenging for the students?
- Are there any distribution of answers that look interesting?

## Item Analysis Results

**School Year: 2009-2010**
**Assessment Year: 2009-2010**
**Assessment: Math, Grade 3, Trimester 1**
**Report Level: District**
**Timestamp: December 15, 2009 at 01:35:50 PM**
**Departments: All**

Filter by Department

| Question Number | State Standard | Responses A | B | C | D | Blanks & Mult. Marks | Percent Answering Correctly |
|---|---|---|---|---|---|---|---|
| 1. | NS 1.1 | 11 | 6 | 8 | 183 | 0 | 88 % |
| 2. | NS 1.1 | 3 | 1 | 54 | 149 | 1 | 72 % |
| 3. | NS 1.1 | 147 | 27 | 23 | 10 | 1 | 71 % |
| 4. | NS 1.1 | 4 | 192 | 9 | 3 | 0 | 92 % |
| 5. | NS 1.1 | 17 | 174 | 14 | 3 | 0 | 84 % |
| 6. | NS 1.2 | 7 | 169 | 17 | 13 | 2 | 81 % |
| 7. | NS 1.2 | 28 | 24 | 16 | 135 | 5 | 65 % |
| 8. | NS 1.3 | 15 | 179 | 9 | 5 | 0 | 86 % |
| 9. | NS 1.3 | 12 | 6 | 170 | 20 | 0 | 82 % |
| 10. | NS 1.3 | 15 | 155 | 28 | 10 | 0 | 75 % |
| 11. | NS 2.1 | 18 | 159 | 25 | 6 | 0 | 76 % |
| 12. | AF 2.2 | 5 | 5 | 3 | 195 | 0 | 94 % |
| 13. | AF 2.2 | 148 | 4 | 7 | 48 | 0 | 71 % |
| 14. | AF 2.2 | 27 | 122 | 28 | 31 | 0 | 59 % |
| 15. | AF 2.2 | 12 | 17 | 124 | 55 | 0 | 60 % |
| 16. | MG 2.1 | 165 | 28 | 12 | 3 | 0 | 79 % |
| 17. | MG 2.1 | 20 | 159 | 17 | 12 | 0 | 76 % |
| 18. | MG 2.1 | 4 | 190 | 10 | 4 | 0 | 91 % |
| 19. | MG 2.1 | 62 | 98 | 27 | 20 | 1 | 47 % |
| 20. | MG 2.2 | 2 | 6 | 176 | 24 | 0 | 85 % |
| 21. | MG 2.2 | 19 | 180 | 2 | 7 | 0 | 87 % |
| 22. | MG 2.1 | 46 | 15 | 144 | 3 | 0 | 69 % |
| 23. | MR 1.1 | 6 | 179 | 21 | 2 | 0 | 86 % |
| 24. | MR 1.1 | 7 | 7 | 169 | 25 | 0 | 81 % |
| 25. | MR 2.3 | 9 | 59 | 106 | 23 | 1 | 51 % |

## Summary

| | |
|---|---|
| **Average Percent Correct** | 76.3% |
| **Percent of Students at or above %** | *Enter a value to view data* |

# 3rd Grade District Data

**11) Find the sum.**

**415 + 74 =**

| | | | |
|---|---|---|---|
| **A** | 481 | 9% | 18 of 208 |
| **B** | 489 | 76% | 159 of 208 |
| **C** | 1,155 | 12% | 25 of 208 |
| **D** | 41,574 | 3% | 6 of 208 |

NS 1. 2

# Grade Level Data Analysis and Instructional Mitigation Form

**Area of Concern (i.e. adding double digit numbers) :** # 11, NS 2.1 Finding the sum of two whole numbers.
Number of students at your grade level that are at benchmark or above in the area of concern: 76%.
The number that are below benchmark in the area of concern: 24%.
**What is your hypothesis about why the data looks the way it does?**

There are three errors being made. The first is confusion over adding and subtracting. Some students wanted to subtract the ones but add the tens and hundreds. The second error has to do with lining up the digits correctly so that the place values are lined up. The final error is a confusion as to what addition is. The students are writing all the digits one after another.

| Names of Intensive (red) and Strategic (yellow) Students in area of concern | What has been done thus far to address their needs? |
|---|---|
| **Red-**<br><br>Ena Harris<br><br>Jessica Evans | Extra homework practice - addition facts<br><br>Allowed scaffold of using dimes and pennies when adding double digit numbers |
| **Yellow-**<br><br>Lissa Hines<br><br>Enikia Ford-Morthel<br><br>Susan Sperber<br><br>Julia Newlin | Allowed scaffold of using dimes and pennies when adding double digit numbers |

# Grade Level Data Analysis and Instructional Mitigation Form

| Instructional Mitigation | Circle One or Create Your Own | Details |
|---|---|---|
| **What is the area of concern?** | **Number sense**<br><br>**Algebra and Functions**<br><br>**Measurement and Geometry**<br><br>**SDAP** | Students are confused with place value when adding multi-digit numbers, the concept of adding two numbers, and subtraction versus addition. |
| **What strategies will you use to address this challenge?** | **Number lines**<br><br>**Decomposition**<br><br>**Multiple representations/ Alternative Algorithm**<br><br>**Build It, Draw It, Write It** | We will use base-ten blocks to model adding multi-digit numbers (concrete representation), students will draw this model (semi-concrete representation), and then write the algorithm (abstract representation). We will also use expanded form when adding multi-digit numbers. |
| **Provide step by step procedure for teaching these strategies.** | | 1. Each student will have a bag of manipulatives in front of them. 3 hundreds, 20 tens , 20 ones, and an 11 x 17sheet of white paper.<br>2. I will show the students 46 + 21 on a mini dry erase board. I will ask the<br>3. students to build 46 on the white sheet of paper.<br>4. I will ask them to build 21 on the white sheet of paper. I will point to the addition equation and what they have built to demonstrate 46 + 21.<br>5. I will ask, "What does this symbol mean?" and point to the addition symbol.<br>6. will ask, "Show me what this means with your base-ten blocks". I will expect them to put the two numbers together.<br>7. "Now let's count how many ones there are. Now let's count how many tens there are". I will point to the equation and show them how their base-ten blocks relate to the numbers in the equation.<br>8. I will follow the same procedure with 34 + 51, 163 + 15, and 451 + 46. We will put the manipulatives away and try some examples on paper. (cont) |

# Grade Level Data Analysis and Instructional Mitigation Form

| | | |
|---|---|---|
| **Where will you incorporate this mitigation into the math program?** | **Math Meeting/Warm-Up**<br>**Mini-Lesson**<br>**Afterschool Intervention** | This will be a mini-lesson taught during workshop of Lesson 72 (Estimating Sums and Differences of Three Digit Numbers) with 3 groups of 4 students (if time allows). |
| **What size group will you work with?** | **Whole Class Instruction**<br>**Small Group Workshop Instruction** | Must Dos<br>1. Guided Practice<br>2. Fact Practice Sheet<br>May Dos<br>1. Writing numbers in expanded form 2. Connect the dots by 3's.<br>3. Measuring and drawing lines segments to the nearest ½ inch.. |
| **How will you assess the effectiveness of your mitigation?** | **Quiz**<br>**Warm-Up**<br>**Product** | All the students in the class will take an exit quiz.<br>The three questions on the quiz will be.<br>1. 163 + 24 =<br>2. 325 + 62 =<br>3. 451 + 47 =<br>All students will be required to show their work on the quiz. |

**TARGET GOALS for area of concern:** Adding multi-digit numbers
**By the next unit assessment, 27 more students will be at or above benchmark as measured by Trimester 2 Assessments.**
**By the next unit assessment, 32 more students will move from intensive to strategic as measured by the Trimester 2 Assessments.**

**Look ahead in the upcoming unit. When will this be taught again? What opportunities are there for further practice?**

The concept of adding multi-digit numbers will come up again in Lessons 72 and 76, and several more after the all day math PD on February 1. As a grade level, we decided to incorporate multi-digit addition problems to every math meeting in the Number of the Day. We will ensure that there are at least 3 three digit addition equations each week.

# Focus Areas

- Select 2 – 3 focus areas. Use the CST Blueprints to prioritize standards on which to focus.
- Discuss why you think this is an area of concern for students. Look to see what insight the distracters.
- Are there other ways to teach this concept that may produce better results (e.g., bar models, number lines, decomposition
- Create an instructional mitigation for this concept.

# Planning Instructional Mitigation

- Email today's form to Francis and Arantxa. Please include the dates on which the mitigations will be implemented.
- Data and student assessment for one mitigation must be submitted to Francis and Arantxa by January 15.