# 2012-13 Charter Renewal Report

# Washington Math Science Technology Public Charter School

# March 15, 2013

DC Public Charter School Board 3333 14th Street, NW, Suite 210 Washington, DC 20010 (202) 328-2660 www.dcpcsb.org

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# **RECOMMENDATION**

Public Charter School Board ("PCSB") staff recommends Washington Math Science Technology Public Charter School's ("WMST PCS") charter be renewed based on the school's overall academic, compliance, and fiscal performance.

# **EXECUTIVE SUMMARY**

WMST PCS began operating in 1998 under the authority of PCSB and is currently in its fifteenth year of operation. In 2002-03, PCSB conducted a five-year review of WMST PCS and determined that, because the school had not kept records of academic data, that the school had only met one of eleven academic goals. Following this review, citing the school's academic performance, and that the school "continues to face fiscal challenges that adversely impact its scholastic program," the PCSB Board issued a "Notice of Revocation Warning" to WMST PCS, along with "Conditions for School Continuance" that the school was required to pursue. In December 2004, the PCSB Board found the school had met these conditions and lifted its "Notice of Conditional Continuance."

In 2008, PCSB conducted a ten-year review of WMST PCS, and determined that the school had met its "academic, [non-academic], governance, and compliance performance standards" and was thus not a candidate for charter revocation. In this review, PCSB noted the school's performance on the DC-CAS (74.68% of the school's students had scored proficient on the DC-CAS in mathematics; 64.56% of students tested proficient in reading), and that the school had "developed and implemented strong fiscal management practices." It was also noted that the school's board had "performed well in governing the school," and that the board "fully understands and is committed to the mission of WMST [PCS] and works tirelessly to secure resources, negotiate partnerships, and expand outreach efforts in support of it."

At the end of this school year, WMST PCS's charter will expire, and it has submitted an application to renew its charter for another fifteen-year term. As part of the renewal process, PCSB must assess whether WMST PCS has: (1) met the goals and student academic achievement expectations ("goals and expectations") included in its Charter; (2) remained materially compliant with applicable laws; and (3) managed its finances effectively and remained economically viable.<sup>5</sup>

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See WMST PCS Five-Year Review, attached to this document as Appendix A.

<sup>&</sup>lt;sup>2</sup> See Notice of Revocation Warning and Conditions for School Continuance, attached to this document as Appendix B.

<sup>&</sup>lt;sup>3</sup> See Letter to Mr. Curtis L. Etherly, Jr., dated December 21, 2004, attached to this document as Appendix C.

<sup>&</sup>lt;sup>4</sup> See WMST PCS Ten-Year Review, attached to this document as Appendix D.

<sup>&</sup>lt;sup>5</sup> See DC Code § 38-1208.12(a)(3).

PCSB staff has conducted this assessment and determined that WMST PCS has met all of its goals and expectations. The following report details this finding, and also assesses WMST PCS's legal compliance and fiscal management and economic viability over the course of its Charter. With regard to the financial criteria, PCSB has great concerns over WMST's long-term economic viability. This must be addressed.

# GOALS AND ACADEMIC ACHIEVEMENT EXPECTATIONS

The District of Columbia School Reform Act ("SRA") provides that PCSB shall not approve a charter renewal application if it determines that the school has failed to meet its goals and expectations set out in its charter agreement. 6 Goals are general aims (usually related to a school's mission), which may be categorized as academic, non-academic, and organizational, whereas expectations are student academic aims measured by assessments. Goals and expectations are only considered as part of the renewal decision if they were included in a school's charter agreement, charter amendment, or Accountability Plans approved by the PCSB Board (collectively, the "Charter").

WMST PCS detailed six goals in its charter application, which are included in the chart below. 7 For the purposes of this review, PCSB analyzed the goals included in the school's charter application and which the school consistently pursued over the course of its Charter. For goals and expectations that were not consistently pursued over the course of the school's Charter, it is noted in the chart below that they were "not historically measured." WMST PCS has met all three goals that it consistently pursued. The chart below summarizes these determinations, which are detailed in the body of this report.

	Goal or Expectation	Met?
1	Demand for a seat at the WMST PCS.  As measured by (1) attendance, (2) reenrollment, and (3) graduation rates	Yes
2	Student academic performance measured against DCPS performance.  As measured by (1) DC-CAS proficiency; (2) SAT and PSAT performance; (3) number of students taking higher level classes; and (4) school median growth percentile	Yes
3	Student academic performance measured against US performance.	Not historically measured
4	Student preparedness for work and life.  As measured by (1) college acceptance rate and (2) student participation in extracurricular activities	Yes
5	The school as a center for civic and community life.	Not historically measured
6	WMST PCS as a change agent for public education in the District of Columbia.	Not historically measured

<sup>6</sup> SRA §38-1802.12(c)(2).

<sup>7</sup> See WMST PCS Charter School Application, attached to this document as Appendix E.

#### 1. Demand for a seat at the WMST PCS.

## Assessment: WMST PCS has met this goal.

In its charter application, WMST PCS detailed six indicators that could be assessed to determine whether it had met this goal: (1) numbers of applications; (2) size of the school's waiting list; (3) attendance rates; (4) dropout rates; (5) graduation rates; and (6) teacher turnover rates. However, the school has not historically reported on all of these indicators, nor has PCSB measured its performance according to all of these indicators. Instead, attendance and reenrollment have been consistently measured over the course of the school's charter. Graduation rates, which are measured as part of the Performance Management Framework ("PMF") are also discussed in this section.

#### **Attendance**

WMST did not meet this goal in its fifth-year review, but did meet the goal during its tenth year review. However, since 2008-09, WMST PCS has maintained an attendance rate higher than the charter sector average. Nevertheless there is a worrying downward trend that should be addressed in the goals of the renewed charter.

Sources: ProActive and WMST PCS Charter Reviews

# Reenrollment

WMST PCS met PCSB's reenrollment target of 75% in its fifth- and tenth-year review. Since 2010-11, WMST PCS' reenrollment rate has exceeded the DC charter sector reenrollment rate.

Source: PCSB PMF

#### **Graduation Rates**

WMST PCS has maintained higher graduation rates than the DC charter sector over the past four years. In 2011-12, OSSE required schools to calculate graduation rates using the Adjusted Cohort Graduation Rate. Graduation rates throughout the District of Columbia dropped when calculated using this method.

#### **Source: PCSB PMF**

Based on the three indicators that have been measured consistently over the course of the school's charter, PCSB concludes that WMST has met this goal.

#### 2. Student academic performance measured against DCPS performance.

#### Assessment: WMST PCS has met this goal.

In its charter application, WMST PCS detailed six indicators that could be assessed to determine whether it had met this goal: (1) Individual Education Compact Parental Participation Rate; (2) performance on standardized tests; (3) SAT scores; (4) number of National Merit Scholars; (5) Number of National Achievement Scholars; and (6) college placements. Out of these indicators, WMST has historically measured and reported on its performance on standardized tests, its SAT scores, and college placements (standardized test performance and SAT scores are discussed below; college placements are discussed elsewhere in this report). Additionally, WMST PCS has historically measured two additional indicators related to this goal: (1) rate of students enrolled in higher-level courses; and (2) students' academic improvement.

DC-CAS Performance
WMST PCS students' reading proficiency rates have been greater than the DCPS average since 2007-08.
Although WMST PCS had a mathematics proficiency rate lower than the DCPS average in 2008-09 and 2009-10, its proficiency rate has been greater than the DCPS average three out of the past five years, and most recently in the past two years.
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<sup>8</sup> Sources for data: http://osse.dc.gov/sites/default/files/dc/sites/osse/release_content/attachments/DCCAS%202012%20Scho
ol%20List_CLEAN%20%281%29.pdf (DC CAS Scores) and http://focusdc.org/data.

## **PSAT Performance**

DCPS PSAT results were not publicly available at the time of this review, so WMST PCS' PSAT performance was compared to that of the DC charter sector. In 2008-09 and 2009-10, WMST PCS outperformed the charter sector on the PSAT, with a higher percent of juniors scoring 80 or higher on the PSAT math and verbal sections. While WMST PCS did not beat the charter sector PSAT rate in the subsequent two years, its PSAT rate has increased each year since 2009-10.

**Source: PCSB PMF** 

\* 2009 and 2010 data (unverified numbers)

#### **SAT Performance**

DCPS publishes its students' average SAT scores, which is not comparable to the methodology PCSB uses to determine WMST PCS' SAT performance. For purposes of this report, WMST PCS' SAT performance was compared to that of the DC charter sector.

In 2008-09 and 2009-10, WMST PCS outperformed the charter sector on the SAT, with a higher percent of seniors scoring 800 or higher on the SAT math and verbal sections. While WMST PCS did not beat the charter sector SAT rate in the subsequent two years, its SAT rate increased by 12.3% between 2010-11 and 2011-12.

Source: PCSB PMF

<sup>\* 2009</sup> and 2010 data (unverified numbers)

#### **Higher Level Courses**

From 2001-08, WMST PCS measured and reported about its students in AP and honors courses, although never in comparison to DCPS performance. In its fifth-year review, 44% of the school's seniors enrolled in AP courses and took the correlating AP examination. <sup>9</sup> In its ten-year review, WMST was assessed according to four targets related to this indicator:

Target	Met Target in tenth year review?
35-43% of students will take AP classes.	No
75-85% of students taking AP courses will pass with grade of "C" or	Yes
better.	
34-40% of students will complete "Honors" courses.	Yes
75-85% of students will pass Honors courses with a grade of "C" or	Yes
better.	

WMST PCS met three of the above four targets, which supports a conclusion that WMST PCS met this goal.

# Academic Improvement

Until 2009, WMST measured its students' academic improvement using the SAT-9 assessment. The school was found not to have met its academic improvement target in its fifth-year review. 10 However, it met its improvement target in its tenth-year review. 11 Starting in 2006, the District of Columbia instituted the District of Columbia Comprehensive Assessment System (DC-CAS). The DC-CAS is a criterion referenced exam and does not have a growth measure. However, PCSB uses the Median Growth Percentile measure to determine growth. WMST PCS' reading MGP was greater than the charter sector average in 2011 and 2012.

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<sup>&</sup>lt;sup>9</sup> WMST PCS Accountability Plan Performance Analysis, attached to this document as Appendix F.

See Appendix A.See Appendix D.

WMST PCS' math MGP was greater than the charter sector average in 2012.
Given WMST PCS' strong performance on the DC-CAS, as well as the other indicators, it has met this
Given WMST PCS' strong performance on the DC-CAS, as well as the other indicators, it has met this goal.

#### 3. Student academic performance measured against US performance.

Assessment: This goal has not been historically measured.

This goal was included in WMST PCS' charter application, but WMST never reported on this goal, and PCSB never assessed the school on this goal.

#### 4. Student preparedness for work and life.

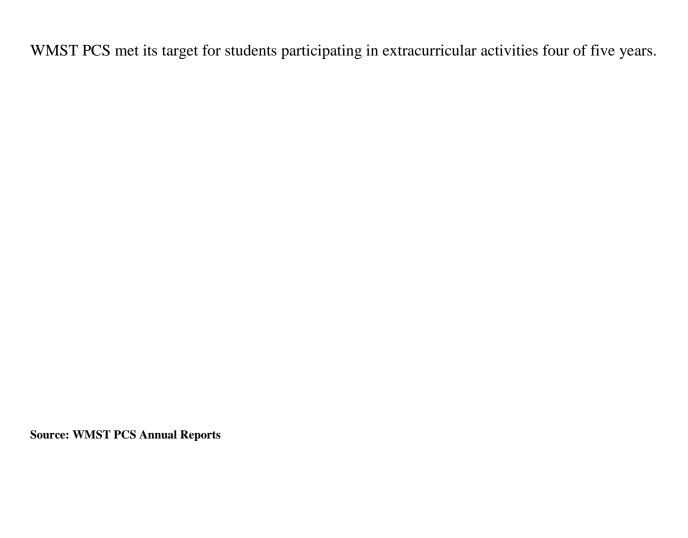
Assessment: WMST PCS has met this goal.

In its charter application, WMST PCS detailed eight indicators that could be assessed to determine whether it had met this goal. <sup>12</sup> However, WMST PCS historically reported on the percent of its graduating seniors that are accepted into college, and the percent of WMST PCS students participating in extracurricular activities. Given its high performance in both of these areas, WMST PCS has met this goal.

In 2009-10 WMST PCS had a drop in the number of students accepted into college. Since that time, this rate has increased, and last year 100% of the school's students were accepted into college.

Source: PCSB PMF

<sup>&</sup>lt;sup>12</sup> Those eight indicators are: (1) ratio of mentors to students; (2) graduation rates from 4-year schools; (3) ranks achieved in armed forces; (4) honorable discharges from armed forces; (5) college completion rates; (6) employment rates; (7) number of school to work placements in area businesses; and (8) socioeconomic status of graduates five years after last year of formal education.



## 5. The school as a center for civic and community life.

Assessment: This goal has not been historically measured.

While WMST PCS included several indicators in its application that could be assessed to measure this goal, <sup>13</sup> the school did not historically measure or report on any of these indicators. For some years, the school measured how many of its parents were involved in school activities. WMST PCS met its target for parents participating in extracurricular activities four of five years, and as such has met this goal.

#### 6. WMST PCS as a change agent for public education in the District of Columbia.

Assessment: This goal has not been historically measured.

This goal was included in WMST PCS' charter application, but WMST never reported on this goal, and PCSB never assessed the school on this goal.

<sup>&</sup>lt;sup>13</sup> These indicators include (1) hours per week and days per year school is open to the community; (2) number of adult education participants; (3) number of meaningful corporate partnerships; (4) number of summer internships; (5) parent participation on task forces; (6) community participation on task forces; (7) use of the school for community meetings; and (8) parent and community surveys.

# COMPLIANCE WITH APPLICABLE LAWS

The SRA provides that PCSB shall not approve a charter renewal if it determines that the school has committed a material violation of applicable laws. <sup>14</sup> The SRA contains a non-exhaustive list of applicable laws, and PCSB also monitors charter schools for compliance with additional laws. The following section identifies these laws and includes a determination of whether WMST PCS has consistently complied with these laws over the past fifteen years.

#### **General Laws**

In its 2012-13 Compliance Review, PCSB found that WMST PCS was in full compliance with all applicable laws. However, in previous years, WMST PCS was not in full compliance with all laws, as described below.

#### Health and Safety

The SRA requires schools to maintain the health and safety of its students. <sup>15</sup> To ensure that schools adhere to this clause, PCSB monitors schools according to various health and safety indicators, including but not limited to, whether schools have qualified staff members that can administer medications, whether schools conduct background checks for all school employees and volunteers, and whether schools have a "School Emergency Response Plan" in place and conduct emergency drills as required by the District of Columbia Fire Department.

In prior years, WMST PCS was not in full compliance with all health and safety laws. In the 2007-08 academic year, the school had not conducted required safety drills. <sup>16</sup> In the 2010-11 academic year, the school did not have an up-to-date School Emergency Response Plan. By its 2012-13 Compliance Review, PCSB found the school to be in compliance with health and safety requirements.

#### Discipline

PCSB reviews school disciplinary policies to ensure that they afford students due process <sup>17</sup> and that students and parents are made aware of these due process safeguards. Over the past five years, WMST PCS has had disciplinary policies that ensure students due process, and has communicated those policies to students and parents.

#### **Enrollment and Attendance**

The SRA requires that schools have a fair and open enrollment process that randomly selects applicants and does not discriminate against students. PCSB requires that schools announce a cutoff date for

<sup>&</sup>lt;sup>14</sup> SRA § 38.1802.12 (c)(2).

<sup>&</sup>lt;sup>15</sup> SRA § 38.1802.04 (c)(4)(A).

<sup>&</sup>lt;sup>16</sup> See WMST PCS Compliance Review (2007-2008), attached to this document as Appendix G.

<sup>&</sup>lt;sup>17</sup> As required by *Goss v. Lopez*, 419 U.S. 565 (1975).

enrollment. In the 2007-08 academic year, WMST PCS failed to properly announce a cut off date for enrollment, as required by PCSB policy. <sup>18</sup> In subsequent years, the school was found to be in compliance with enrollment and attendance requirements.

# Maintenance and Dissemination of Student Records

The Family Educational Rights and Privacy Act requires that schools properly maintain and disseminate student records. PCSB has found WMST PCS in compliance with these requirements over the past five years.

# <u>Title I of the Elementary and Secondary Education Act</u>

Because WMST receives Title I funds, it is required to adhere to a number of requirements under the Elementary and Secondary Education Act ("ESEA"), including hiring "Highly Qualified Teachers" and communicating certain information to parents about its participation in No Child Left Behind ("NCLB") program. <sup>20</sup> In previous years, WMST was not always in compliance with these requirements. In its tenyear review performed in 2008, the school had not properly notified parents about its teachers' Highly Qualified status. <sup>21</sup> In the 2008-09 and 2009-10 academic years, WMST failed to notify parents of their right to request information regarding teachers' qualifications, and did not notify parents if a student was taught by a non-Highly Qualified teacher for more than four weeks. <sup>22</sup> In the 2010-11 academic year, WMST PCS informed parents of their right to request information about the teacher's qualifications, but failed to ensure that all teachers were Highly Qualified. By its 2011-12 and 2012-13 compliance reviews, WMST PCS was in full compliance with all requirements.

## **Civil Rights Statutes and Regulations**

Charter schools must comply with all applicable local and federal civil rights statutes.<sup>23</sup> There is no indication that WMST has violated any civil rights statutes.

#### Governance

The SRA requires that a school's board of trustees have an odd number of members, not exceeding fifteen, two of which must be parents of students currently attending the school. A majority of the board must be District of Columbia residents.<sup>24</sup> WMST has been fully compliant with these requirements over the past five years.

<sup>19</sup> 20 U.S.C. § 1232g.

<sup>21</sup> See Appendix F.

<sup>22</sup> See WMST PCS Compliance Review (2008-09), attached to this document as Appendix H.

<sup>&</sup>lt;sup>18</sup> See Appendix G.

<sup>&</sup>lt;sup>20</sup> 20 U.S.C. § 6300, et. seq.

<sup>&</sup>lt;sup>23</sup> SRA § 38-1802.02 (11). This includes the Age Discrimination Act of 1985, the Civil Rights Act of 1964, Title IX of the Education Amendments of 1972, § 504 of the Rehabilitation Act of 1973, part B of the Individuals with Disabilities Act of 1990.

<sup>&</sup>lt;sup>24</sup> SRA § 38-1802.05 (a).

#### **Special Education Laws**

Charter Schools are required to comply with Subchapter B of the Individuals with Disabilities Education Act<sup>25</sup> and Section 504 of the Rehabilitation Act of 1973. In 2012, PCSB conducted a desktop audit of six special education indicators to assess WMST PCS' compliance with these laws and the educational progress of its special education students. This desktop audit indicates that WMST PCS is incompliant with some of these laws. If WMST PCS' charter is renewed, such incompliances must be addressed moving forward.

#### Academic Performance of WMST PCS Special Education Students

Federal special education laws are in place, among other reasons, to ensure that schools adequately assist students with disabilities in making academic progress. As part of the special education desktop audit, PCSB reviews how schools' students with disabilities performed on the DC-CAS.

WMST PCS' students with disabilities' scores increased between 2009-10 (reading: 33%; math 8%) and 2011-12 (reading: 40%; math: 20%) on the DC-CAS, and was higher than the state average in both years (2010-11 state average for reading and math was 17% and 19%, respectively; 2011-12 state average for reading and math was 17% and 20%, respectively). However, the achievement gap between WMST's general school population and its special education population increased from 2009-10 to 2011-12, as indicated by the following chart.

	Reading Achievement Gap	Math Achievement Gap
WMST PCS		
Achievement	16%	31%
Gap 2009-10		
WMST PCS		
Achievement	21%	37%
Gap 2011-12		
Statewide		
Achievement	29%	30%
Gap 2011-12		

Compliance Review of WMST PCS by the District of Columbia Office of the State Superintendent
As part of the desktop audit, PCSB examines special education compliance and monitoring
documentation prepared by the District of Columbia Office of the State Superintendent ("OSSE"). In
2010, OSSE found WMST PCS to be 88% compliant with its special education requirements, noting that
the school "Meets Requirement" in fulfilling all applicable federal and local special education

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<sup>&</sup>lt;sup>25</sup> 20 USC §1413(a)(5).

<sup>&</sup>lt;sup>26</sup> 20 USC §794.

<sup>&</sup>lt;sup>27</sup> See WMST PCS – Online Desktop Audit, attached to this document as Appendix I.

regulations. <sup>28</sup> Two years later, OSSE indicated that the school was incompliant with secondary transition requirements. <sup>29</sup>

## <u>Timeliness of Special Education Processes</u>

OSSE found that WMST PCS did not always implement due process complaint requirements for its students with disabilities in a timely manner, as required by federal law and the Special Conditions imposed by the US Department Education on OSSE. <sup>30</sup>

#### **Financial Laws**

#### **Procurement Contracts**

Section 38-1802.04(c)(1) of the SRA requires DC charter schools to utilize a competitive bidding process for any procurement contract \$25,000 or more, and within three days of awarding such a contract, to submit to PCSB all bids received, the contractor selected, and the rationale for which contractor was selected. To ensure compliance with this law, PCSB requires schools to submit a Determinations and Findings form to detail any qualifying procurement contract entered into. WMST PCS submitted seven Determination and Findings forms for such contracts from 2008-2011. In the school's 2011-12 audit, six \$25,000+ contracts were identified for which WMST PCS should have submitted a corresponding Determination and Findings form, but only one such form was submitted to PCSB for review, indicating that WMST PCS was out of compliance with the contracting provision of the SRA during School Year 2011-2012.

#### **Timely Audits**

The SRA requires schools to submit to PCSB an annual financial audit conducted by an independent certified public accountant or accounting firm.<sup>31</sup> Over the past four years, WMST PCS has submitted all financial audits in a timely manner.

#### Submission of Information about Donors and Grantors

The SRA requires schools to submit to PCSB an annual list of all donors and grantors that have contributed monetary or in-kind donations having a value equal to or exceeding \$500. 32 WMST PCS has fulfilled this requirement since 2008-2009 by reporting this information in its annual reports.

<sup>&</sup>lt;sup>28</sup> See 2010 OSSE report, attached to this document as Appendix J. OSSE uses the same determination levels as the United States Department of Education: (1) meets requirements; (2) needs assistance; (3) needs intervention; or (4) needs substantial intervention.

<sup>&</sup>lt;sup>29</sup>OSSE Quarterly Finding Report (June 29, 2012), attached to this document as Attachment K.

<sup>&</sup>lt;sup>30</sup> See Attachment H (footnote 30).

<sup>&</sup>lt;sup>31</sup> SRA §38-1802.04(c)(11)(ix).

<sup>&</sup>lt;sup>32</sup> SRA §38-1802.04(c)(11)(xi).

# Conclusion

After reviewing all relevant compliance documents, PCSB concludes that WMST PCS has not committed a material violation of applicable laws from 2007-08 to present.

# FISCAL MANAGEMENT AND ECONOMIC VIABILITY

The SRA requires the Board to revoke a charter at any time if it determines that the school:

- Has engaged in a pattern of nonadherence to generally accepted accounting principles;
- Has engaged in a pattern of fiscal mismanagement; or
- Is no longer economically viable.

As part of the fifteen-year charter renewal process, PCSB has reviewed WMST PCS's financial record regarding these areas.

#### **Adherence to Accounting Principles**

The school has consistently adhered to generally accepted accounting principles, as established by the Financial Accounting Standards Board.

#### **Fiscal Management**

Per its audited financial statements, WMST PCS has not engaged in fiscal mismanagement. The school's audit reports reflect sound accounting and internal controls, and no instances of incompliance that are required to be reported per the U.S. Government Accountability Office's Auditing Standards. The school has consistently submitted all necessary financial documents to PCSB in a timely manner.

#### **Economic Viability**

A review of annual audits indicates WMST PCS will not be economically viable for the long-term if its annualized budget overruns continue. <sup>33</sup> One indicator of economic viability is a positive year-end annualized net income. WMST PCS has concluded four of its last five fiscal periods with negative net income balances. The school's net asset balance has declined rapidly from a period high of \$2MM at the end of FY2008 to \$71K at the end of the FY2012. At a October 2, 2012 meeting between PCSB and WMST PCS, school leadership identified several cost-cutting strategies being deployed during school year 2012-2013 to increase the school's net asset balance. The school's net asset position is expected to increase to \$250K by June 30, 2013 as a result of the cost-cutting strategies.

Net working capital<sup>34</sup> and a liquidity ratio<sup>35</sup> greater than one points to a school's ability to meet its immediate financial obligations. WMST PCS has struggled to successfully manage its working capital needs since the conclusion of FY2011. The school has generated working capital deficits of \$597K during FY2011 and \$313K during FY2012. School leadership expects for the annualized working capital deficits to taper off by the conclusion of FY2013. WMST PCS's liquidity ratio has been lower than one at the conclusion of each of the last three fiscal years, as detailed in the following table:

<sup>35</sup> Liquidity Ratios are calculated by dividing total assets by total liabilities.

<sup>&</sup>lt;sup>33</sup> See WMST PCS activities and financial analysis sheet, attached to this document as Appendix L.

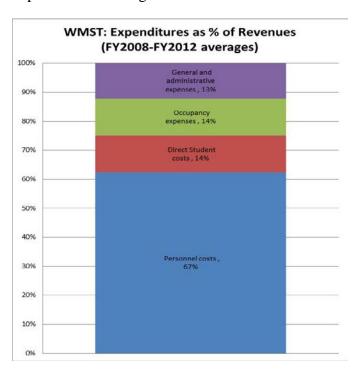
<sup>&</sup>lt;sup>34</sup> Net working capital is an organization's total assets, less its total liabilities.

Fiscal Period	2008	2009	2010	2011	2012
Net Working capital	\$ 952,953	\$ 189,603	\$ (39,738)	\$ (596,925)	\$ (313,635)
Liquidity ratio	2.74	1.33	0.93	0.25	0.49

Additionally, the school does not have sufficient long-term solvency. PCSB recommends that schools accrue net asset reserves equal to three to six months of operational expenditures. For the financial period ending June 30, 2012, WMST PCS's total net assets approached \$71K (up from a deficit \$8K the prior year). The school's monthly expenditures were approximately \$530K, indicating a net asset reserve of about four days. These issues must be addressed by the school as part of the renewal.

Fiscal Period	2008	2009	2010	2011	2012
Net Income	\$ (187,650)	\$ (902,723)	\$ (409,109)	\$ (744,603)	\$ 79,719
Cumulative	\$ 2,048,008	\$ 1,145,285	\$ 736,176	\$ (8,427)	\$ 71,292
Reserves					

The chart below details WMST PCS's average expenditures as a percentage of revenues for the last five fiscal periods (FY2008 – FY2012). Salaries and occupancy costs are out of line with that of a typical public charter school and PCSB financial metrics. As indicated by the chart below, the school's five-year average salary and occupancy expenditures were 67% and 14% of the school's total revenue, respectively (and when considered together, 81% of the school's total revenue). PCSB established thresholds are 50% for salary as a percentage of revenues and 25% for occupancy as a percentage of revenues (75% when summed). As previously mentioned, school leadership has deployed several cost-cutting strategies to reduce expenditures this school year (SY 2012-2013), which should reduce the school's program-related expenditures moving forward.



# Appendix A

# Narrative Analysis on WMST's Performance Based On Fifth Year Review Framework

# Academic performance: A school becomes a candidate for revocation if it fails to meet 2 of the 3 academic standards below:

1. The school must attain the majority of the 5-year academic performance goals

WMST has 11 academic targets. Therefore the school needs to meet 6 of 11targets. WMST has met 1 target, did not meet 4 targets, and provided insufficient data to determine if it satisfied the 6 remaining targets.

#### Overall, WMST did not meet this criterion.

2. The school must show improvement on a majority of academic goals over the recent two school years.

WMST has 11 academic targets. Therefore the school needs to show improvement in 6 of 11 targets. Due to conflicting baseline data and missing data for two consecutive years (Years 3 through 5), it was not possible to measure improvement on a majority of academic goals over the most recent two school years.

#### Overall, WMST did not meet this criterion.

3. The school must come within 80 percent of the five-year Stanford 9 achievement targets in its accountability plan. If the targets are expressed in terms of NCE gain, the school wide average must be 80 percent of the stated goal.

WMST's accountability plan 5-year Stanford 9 target is 10% increase in NCE scores. The 1999 baseline scores are 38% reading and 37% math. Therefore, 80% of this stated goal (48% reading and 47% math) would be 38% reading and 37% math. WMST has met this target with 43% in math and reading scores.

However, the criteria of 80% perhaps should be revisited, since that is the school's baseline score, and thus is not indicative of growth.

#### Overall, WMST did meet this criterion.

WMST FAILED TO MEET 2 OF THE 3 ACADEMIC STANDARDS, AND THUS IS A CANDIDATE FOR REVOCATION IN THIS AREA.

# Non-Academic performance: A school becomes a candidate for revocation if it fails to meet 2 of the 4 academic standards below:

1. For non-academic student outcomes, the school-wide average should meet or exceed 80 percent of the five-year targets.

WMST has three non-academic targets. In each target area—90% school-wide attendance, 35% student participation in extra-curricula activities, and 90% continuous re-enrollment—WMST met 80% of the stated goal.

\*Note that WMST provided annual re-enrollment data, not continuous reenrollment for students matriculating at WMST for 3+ years (the stated goal in its accountability plan). Using the annual re-enrollment data, WMST met this target. If this data is not acceptable, then WMST did not meet this criterion (due to insufficient data).

#### Overall, WMST did meet this criterion.

2. The school must attain the attendance targets set in its accountability plan.

WMST's 5-year attendance target was 90%. WMST attendance rate was 83%.

#### Overall, WMST did not meet this criterion.

3. Enrollment levels must be sufficient to sustain the economic viability of the school.

WMST's student enrollment has fluctuated over the years, for example 2001-2002 was 352 pupils and 2002-03 was 295 pupils. However, the enrollment numbers have not threatened the fiscal viability of the school.

#### Overall, WMST did meet this criterion.

(Perhaps audit data is needed here. My understanding is that WMST's fiscal problems were caused by facilities payments, not low enrollment numbers (i.e., revenue from per pupil dollars) There has been some missed reporting, so I am not certain what data is available. Do we need Bridget's input for this criterion for all seven schools?)

4. Re-enrollment of eligible students should average 75 percent or higher for the past two years.

WMST provided annual re-enrollment data for 2001-02 (75%) and 2002-03 (80%). The average re-enrollment is 78%.

Overall, WMST did meet this criterion.

# WMST HAS MET 3 OF THE 4 NON-ACADEMIC STANDARDS. THUS, RECEIVES A PASSING RATING IN THIS AREA.

#### Final comments:

WMST has a mixed 5-year review outcome. The school failed to meet the academic performance standards, but has met the non-academic performance standards. Insufficient data was the primary catalyst to the school's failure to meet the criteria in two of the three academic areas. This is a significant problem that probably requires some staff technical assistance to the school and Board determination if insufficient data can constitute a school's failure.

Moreover, if a school receives a mixed rating is that automatic grounds for "probationary" status (insert new word) or conditionary continuous for the 12-month period with a final determination being made after the next PDR, as stated in the 5-year framework?

# Accountability Plan Performance Analysis School: Washington Math Science Technology

ACADEMIC PERFORMANCE STANDARDS								
Fifth Year Target <sup>1</sup>	Perfo	Targe	et Met?					
ritii Year Target	Baseline <sup>2</sup>	Year 3	Year 4	Year 5	Y	N		
10% increase in applications submitted to college.	82%	No data provided	No data provided	No data provided <sup>3</sup>		X		
5% increase of students receiving scholarships.	41%	No data provided	39%	35%		X		
10% increase of students accepted to college.	65%4	No data provided	90%	93%	X			
15% increase in the number of senior students taking AP math, science, or technology courses.	33%	No data provided	43%	34%		X		
10% increase in the number of seniors who earned at least a "C" in AP math, science, or technology course.	75% of seniors	No data provided	No data provided	No data provided <sup>5</sup>		X		
30% increase of seniors enrolled in AP courses who will take the AP exam.	33%	No data provided	43% of seniors	44% of seniors		X		
15% increase in the number of students enrolled in math, science, and technology courses.	No data provided	No data provided	No data provided	No data provided		X		

<sup>1</sup> 

<sup>&</sup>lt;sup>1</sup> All of WMST's fifth-year academic targets are to be compared against its baseline performance.

<sup>&</sup>lt;sup>2</sup> Baseline data reported in WMST's Annual Report Chart of Accountability Plan Performance differed from that reported in its Accountability Plan, making it unclear as to when the baseline was established.

<sup>&</sup>lt;sup>3</sup> School does not provide data on college applications submitted for 2001-2002, so the increase in college applications cannot be computed. However, given that 93% and 91% of graduates in SY 2002-2003 and 2001-2002 respectively attended college, it is very likely that the school attained its targets for college application submissions.

<sup>&</sup>lt;sup>4</sup> The school reported two different baselines--82% and 65%--in its Chart of Accountability Plan Performance and its Accountability Plan. Regardless, the school's actual performance was greater than 10% of the higher 82% baseline.

<sup>&</sup>lt;sup>5</sup> The school reported that 89% of students earned at least a "C" in AP math, science, or technology courses, however, no such data was reported for seniors, as required by its Accountability Plan.

# Accountability Plan Performance Analysis School: Washington Math Science Technology

ACADEMIC F	PERFORMANC	E STANDA	RDS					
Fifth Year Target <sup>1</sup>	Perf	Targe	t Met?					
ritii Year Target	Baseline <sup>2</sup>	Year 3	Year 4	Year 5	Y	N		
15% increase in the number of students who receive a grade of "C" based on final grades in math, science, and technology	No data provided	No data provided	No data provided	No data provided		X		
10% increase in the number of students who participate in the citywide science fair	No data provided	No data provided	No data provided	No data provided		X		
10% increase of NCE scores over baseline - READING	1999 – 41.7%	41.9%	38.8%	42.8%		X		
10% increase of NCE scores over baseline - MATH	1999 – 57.8%	45.8%	47.8%	43.0%		X		
Attained majority of 5-year academic performance goals?					1	10		
Improvement on a majority of academic goals over the two		X						
Within 80% of SAT-9 (or alternative assessment) targets?  READING Target – 52% (80% = 41.6%)  MATH Target – 68% (80% = 54.4%)	Within 80% of SAT-9 (or alternative assessment) targets?  READING Target – 52% (80% = 41.6%)							

#### **Comments:**

## Washington Math Science Technology meets 1 out of the 3 academic performance standards:

- WMST included an accountability plan in their 2002-03 annual report that differed from the PCSB's approved plan. This analysis is based on the approved February 2002 accountability plan from the PCSB.
- WMST's poor academic performance is heavily based on poor data collection (five out of 11 targets), which resulted in gaps in reporting performance or the lack of any data to measure performance for certain measures.

<sup>6</sup> Because of the lack of clarity regarding when the baseline data was established (Year 2 or Year 3), and a lack of data over two consecutive years (Years 3 through Year 5), it was not possible to track improvement on a majority of academic goals over the two most recent years.

# Accountability Plan Performance Analysis School: Washington Math Science Technology

NON-ACADEMIC	PERFORMANCE STA	ANDARDS				
Eifth Voor Torgot	Performa	Targe	et Met?			
Fifth Year Target	Baseline	Year 5	Y	N		
Maintain 90% attendance rate of all students across all school days	82%	83%		X		
35% of students will be participating in at least one extra curricular activity.	25%	87%	X			
10% will serve in school leadership position	No data provided	No data provided		X		
To sustain the continuous enrollment of 90% of students recruited and enrolled at WMST until their graduation	No data provided	No data provided <sup>7</sup>		X		
Schoolwide average within or exceeding 80% of five-year	targets?		2	2		
Attendance targets met?				$X^8$		
Enrollment levels sufficient to sustain the economic viability of the school?						
Re-enrollment of eligible students average 75% or higher for 2002 – 2003 re-enrollment rate = 75% 2001 – 2002 re-enrollment rate = 80%	for the past two years?		X			

#### **Comments:**

# Washington Math Science Technology meets 2 out of the 4 non-academic performance standards:

• The school entered into a lease in August 2002, which placed a financial strain on the school for several reasons. First, the rent was elevated. Additionally, the lateness of locating and securing a permanent site caused a decrease in enrollment levels, which further exacerbated the school's financial position. In SY 2003-2004, the school subleased space to another charter school and increased its enrollment to improve its financial standing.

<sup>&</sup>lt;sup>7</sup> The school reported re-enrollment from year-to-year, as opposed to continuous enrollment of students beginning in grade 9 through grade 12.

<sup>&</sup>lt;sup>8</sup> The school's attendance rate was below the DCPS average for high schools of 87%.

# Appendix B

## Notice of Revocation Warning – Washington, Math, Science and Technology

Based upon the fifth year review criteria, the Public Charter School Board finds Washington, Math, Science, and Technology Public Charter School (WMST) academic performance over its five-year period of operation to be below the PCSB's academic standard. WMST met one of the academic targets set in its accountability plan is of grave concern for the PCSB. Moreover, WMST continues to face fiscal challenges that adversely impact its scholastic program. Therefore, the PCSB staff recommends that a Notice of Revocation Warning be issued to Washington, Math, Science, and Technology Public Charter School.

The intention of the Revocation Warning is two-fold. First, the PCSB is informing a school that they are at-risk of closure due to poor performance. Second, the PSCB is providing the conditions for school continuance.

## **Conditions for School Continuance**

The PSCB recommends the adoption of the following strategies to Washington, Math, Science, and Technology Public Charter School. Failure to address the conditions below in a satisfactory manner will result in revocation of WMST's charter as of July 2005.

#### Fiscal

- Aggressively seek out and garner additional resources (human and capital) or redistribute WMST's present financial allocations in a manner that will adequately supplement the school's instructional program.
- O Appoint an individual to the board of trustees with fund development expertise, if the current board composition is lacking in this area by September 1, 2004. Otherwise, identify a board member to be responsible for fund development activities and develop a fundraising strategic plan by November 1, 2004.

#### Academic

- o Provide evidence of professional development or a schedule of planned professional development activities for teachers related to instruction of the virtual science laboratory by August 1, 2004.
- o Implement the virtual science laboratories for all students by October 1, 2004.
- O Develop school-wide rubrics and standards for the math curriculum for grades 9-12 by September 1, 2004.
- o Develop internal assessments to measure school-wide performance in math that are aligned with the math curriculum by September 1, 2004.
- o Provide evidence of professional development and/or a planned schedule of professional development activities in math for teachers.

- o Institute enrichment programs throughout the 2004-2005 school year for all students that demonstrate deficiencies in math.
- o Provide evidence of data collection for new math assessments as part of the revised accountability plan.

# Appendix C

Mr. Curtis L. Etherly, Jr. Board Chair WMST Public Charter High School 1000 Thirteenth Street, SE Washington, DC20003

#### Dear Mr. Etherly:

The District of Columbia Charter School Board (PCSB) voted unanimously to lift Washington Math Science Technology Public Charter High School's Notice of Conditional Continuance at its monthly meeting held on December 20, 2004. The Notice of Conditional Continuance, issued in February 2004, was based on the results of the Fifth Year Review Framework for school years 1998-1999 through 2002-2003. According to the review, the school failed to meet its academic standards, which were reflected in the conditions cited in the Notice of Conditional Continuance. School leaders submitted documentation to the PCSB satisfying the following conditions in order for the Notice of Conditional Continuance to be lifted:

- 1) No later than June 1, 2004, document the school's efforts to garner additional resources (human and capital) or redistribute WMST's present financial allocations in a manner that will adequately supplement the school's instructional program. Additionally, the Board of Trustees should appoint an individual with fund development expertise, if the current board composition is lacking in this area, by August 2, 2004 and develop a fundraising strategic plan no later than November 1, 2004. Otherwise, if such expertise currently exists on the Board of Trustees, identify a board member to be responsible for fund development activities and develop a fundraising strategic plan by August 2, 2004.
- 2) Provide documentation of how the school is providing laboratory experiments for all students in the current school year no later than March 1, 2004. Additionally, provide evidence of professional development or a schedule of planned professional development activities for teachers related to instruction of the laboratory experiments by March 1, 2004.
- 3) WMST must do the following as it relates to the delivery of math instruction:
  - a) Develop school-wide rubrics and standards for the math curriculum for grades 9-12 by September 1, 2004.

- b) Develop internal assessments to measure school-wide performance in math that are aligned with the math curriculum by September 1, 2004.
- c) Provide evidence of professional development and/or a planned schedule of professional development activities in math for teachers no later than September 1, 2004.
- d) No later than September 1, 2004, provide documentation of enrichment programs beginning no later than fall 2004 for all students that demonstrate deficiencies in math.
- e) Provide evidence of data collection methods for new math assessments as part of the revised accountability plan no later than September 1, 2004.

As Washington Math Science Technology Public Charter High School satisfied all conditions set forth in the Notice of Conditional Continuance, the school is granted full continuance as outlined in the School Reform Act § 38-1802.12. We hope that Washington Math Science Technology Public Charter High School continues to provide challenging educational opportunities for high school students in Washington, DC.

Sincerely,

Thomas Nadia

Thomas a Plat

Chair

cc: Floyd Gilmore, Principal

# Appendix D

#### **Executive Summary**

WMST Public Charter School met the academic, non-academic, organizational-governance, and organizational –compliance domains at exemplary levels of performance standards. The school has made strong progress towards achieving its accountability goals, continues to earn the support of parents, and demonstrates financial stability. Therefore, based on the standards of the Charter Review Framework the school is not a candidate for charter warning. WMST"s most recent PDR review was conducted in November 2007. (*See fig 1.1*)

#### Academic

**WMST** has met 3 of 3 academic performance standards. The School met ten of the twelve annual academic performance targets and also met the middle performance levels on the DC CAS in both reading and math. The school also met the state performance standards on the DC CAS in reading or math, thus achieving annual yearly progress.

#### **Non-Academic**

**WMST has met 4 of 4 non-academic performance standards.** The school was able to meet four of its annual non-academic performance targets. Current enrollment levels are sufficient to sustain the school's economic viability, with greater interest being given to the school within the community based on recent local and national media coverage.

#### **Organizational – Governance**

WMST's board has performed well in governing the school, demonstrating exemplary functioning performance in 6 of 7 categories and fully functioning performance in 1 of 7 categories. The board has strategically and systemically transitioned WMST from an unstable and financially burdened organization to a high performing and stable one.

#### Organizational - Compliance

WMST has met the organizational performance standards for compliance, demonstrating exemplary or fully functioning performance in 7 of 7 categories. Specifically, the school demonstrated exemplary in all seven categories over the past four years. The school continues to appropriately address NCLB requirements related to "HQT." The school has demonstrated exemplary record keeping practices that meets and exceeds accountability guidelines.

#### <u>Organizational – Fiscal Management</u>

Based on the information available, the PCSB believes that WMST Public Charter School quickly developed and implemented strong fiscal management practices. The school's audit reports reflect sound accounting and internal controls policies. The school has done an extremely good job submitting all necessary documents to the PCSB for review when required. The annual budgets are extremely thoughtful and reflect careful planning and financial savvy. One of the low points of the school FY07 audit pertained to a few procurement lapses whereby the school entered into two contractual agreements in excess of \$25K without appropriately notifying PCSB. The school must work to ensure that such lapses do not occur in future fiscal cycles. As with any not-for-profit

organization, the school should seek to continuously improve its fiscal management and internal controls.

Fig. 1.1

Curriculum and Standards	FINDING
1.1 The school has a clearly defined, quality curriculum in place that is aligned with the state standards and the school's mission and goals.	Satisfactory
1.2 The school's curriculum is implemented with fidelity. Materials are available to support the implementation of the curriculum.	High
1.3 There are clear and regular procedures in place to review and update the curriculum.	High
Instruction	FINDING
2.1 Instruction utilizes effective strategies that provide opportunities for student learning and active engagement in the learning process.	Satisfactory
2.2 The school has strategies in place to meet the needs of students at risk of academic failure or students not making reasonable progress toward achieving school goals.	High
2.3 The school has strategies in place to meet the needs of English Language Learners.	Not Applicable
2.4 Strategies are in place to ensure that students with IEPs are making progress in meeting school goals and IEP goals.	Exemplary
2.5 Time is made available throughout the year for planning and professional development.	High
2.6 The school helps teachers meet accountability plan goals, and addresses any identified shortcomings in student learning.	Satisfactory
2.7 Extra support is in place to support new teachers and those not designated as "highly qualified."	High
Assessment	FINDING
3.1 The school has assessment and evaluation data, such as standardized and internal assessments results and accountability plan performance outcomes.	Satisfactory
3.2 The school tracks and reports student performance data to determine whether the school's academic and non-academic goals are being achieved.	Satisfactory
3.3 Assessments and evaluation data are used to monitor student learning, instructional effectiveness, and instructional decisions. Ongoing, informal assessments are used to provide increased instructional opportunities.	Satisfactory
School Climate and Parents	FINDING
4.1 Quality instruction is promoted through fostering an academic learning climate and actively supporting teaching and learning.	High
4.2 The school is a safe and orderly learning environment.	Exemplary
4.3 Parents/guardians and students are satisfied with the school.	Exemplary
Governance and Management	FINDING
5.1 The Board and school administrators govern and manage in a manner consistent with the school's design and mission.	Exemplary
5.2 The Board and the school's administration ensure adequate resources to further the academic and organizational success of the school, including but not limited to adequate facilities, appropriate professional development, services for special needs students, and additional funding.	High
5.3 The Board has ensured strong and stable school leadership.	High

#### ACADEMIC PERFORMANCE

A school becomes a candidate for the Charter Warning List if it fails to meet 2 of the 3 academic standards below:

**Criterion #1:** The school must attain the majority of the fourth year academic performance goals.

WMST has twelve (12) academic performance targets. WMST met 10 of the 12 academic performance targets. The school met the majority of its fourth year academic performance targets.

Overall, WMST Public Charter School met this criterion.

**Criterion #2:** The school must achieve no less than the middle performance level in reading and math on the DC CAS.

WMST met the school-wide middle performance levels in reading with the school-wide average being 66%. The school-wide average in math was 60%.

Overall, WMST Public Charter School met this criterion.

**Criterion #3:** The school currently meets the State Agency's standard for AYP in reading and mathematics.

WMST met the State Education Agency's 2006-2007 AYP standard in reading or mathematics. Reading scores were 58% and math scores were 60%.

Overall, WMST Public Charter School met this criterion.

OUTCOME: WMST Public Charter School met 3 of 3 academic standards, and thus meets the standards for academic performance.

#### NON-ACADEMIC PERFORMANCE

A school becomes a candidate for the Charter Warning List if it fails to meet 2 of the 4 non-academic standards below:

**Criterion #1:** For non-academic student outcomes, the school-wide average should meet or exceed 80 percent of the four year targets.

WMST has four non-academic targets and met all of them.

Overall, WMST Public Charter School met this criterion.

**Criterion #2:** The school must attain the attendance targets set in its accountability plan.

WMST's fourth year attendance target was 87%. The school's daily attendance rate for the 2006-2007 school years was 96.5%. Therefore, the school exceeded its fourth year attendance target set in its accountability plan.

Overall, WMST Public Charter School met this criterion.

**Criterion #3:** Enrollment levels must be sufficient to sustain the economic viability of the school.

WMST's enrollment levels are sufficient to sustain the fiscal viability of the school.

#### Overall, WMST Public Charter School met this criterion.

**Criterion #4:** Re-enrollment of eligible students should average 75 percent or higher for the past two years.

WMST's re-enrollment data for 2005-2006 was 89% and for 2006-2007 the re-enrollment rate was 90.5%. The average re-enrollment rate is 92%; therefore, the school did meet the re-enrollment standard.

Overall, WMST Public Charter School met this criterion.

**OUTCOME:** WMST Public Charter School met four of the four non-academic performance standards.

### ORGANIZATIONAL PERFORMANCE – GOVERNANCE

**Criterion:** A school will be a candidate for a Charter Warning if it demonstrates limited or low levels of development in 4 of 7 categories based on the following scale.

Performance Level	<b>Rating</b>
Exemplary	4
Fully Functioning	3
Limited/Partial Development	2
Low Level/No Evidence of Development	1

Category	Performance Level/Rating
Meetings and Board Structure	4
PCSB Action	4
Annual Reporting	4
Adequate Resources	4
Implementation of School Design	3
Leadership	4
Operating within Bylaws	4

OUTCOME: WMST Public Charter School demonstrated exemplary or fully functioning performance in 7 of 7 categories, and thus meets the standard for organizational performance.

### ORGANIZATIONAL PERFORMANCE - COMPLIANCE

**Criterion:** A school will be a candidate for a Charter Warning if it demonstrates a low or no evidence of development or implementation in 4 of 7 categories as it relates to compliance with applicable laws, rules and regulations based on the following scale.

Performance Level	<u>Rating</u>
Exemplary	4
Fully Functioning	3
Limited/Partial Development	2
Low Level/No Evidence of Development	1

Category	Performance Level/Rating
Health and Safety Regulations	4
Certificate of Occupancy	4
Insurance Certificates	4
Background Checks	4
Inventory of School's Assets	4
Open Enrollment Process	4
NCLB Requirements	4

OUTCOME: WMST Public Charter School demonstrated fully functioning or exemplary performance in all 7 categories, and thus meets the standard for organizational performance.

# ORGANIZATIONAL PERFORMANCE – FISCAL MANAGEMENT

**Fiscal Management Criterion:** A school will be a candidate for revocation of its charter if it demonstrates substandard or poor performance in any 2 of 5 categories based on the following scale:

Performance Level	<u>Rating</u>
Above Average	5
Satisfactory	4
Watch – Improvements Required	3
Substandard – Probation	2
Poor – Revocation	1

	Category	Performance Level/Rating
1.	Accounting Policies	5.00
2.	Financial Reporting	4.25
3.	Internal Controls	4.25
4.	Transparency of Financial Management	5.00
5.	Fiscal Prudence	4.56

OUTCOME: WMST Public Charter School demonstrated above average or satisfactory performance in 5 out of 5 categories, and thus meets this standard for organizational performance.

ACADEMIC PERFORMANCE STANDARDS							
Annual Year Target		Performance/Data Verified				rget Iet?	
	Baseline	Year 2	Year 3	Year 4	Y	N	
1.1) 95-98% of eligible seniors will be accepted to a 2 or 4 year college or technical school.	100%	97%	99%	97%	X		
1.2) 35-43% of students will take AP classes.	29%	19%	33%	26%		X	
1.3) 75-85% of students taking AP courses will pass with grade of "C" or better.	82%	85%	94%	84%	X		
1.4) 34-40% of students will complete "Honors" courses.	36%	13%	34%	38%	X		
1.5) 75-85% of students will pass Honors courses with a grade of "C" or better.	80%	89%	91%	94%	X		
1.6) 54-58% of students will receive an NCE positive gain score in reading.   PCSB's Fourth Year Target: School-wide, WMST will achieve no less than middle performance level in reading on the DC-CAS <sup>2</sup>	52.8%	Test Not Administered <sup>3</sup>	58.41%	66.24%	X		
1.7) 64-68% of students will receive an NCE positive gain score in math.  PCSB's Fourth Year Target: School-wide, WMST will achieve no less than middle performance level in math on the DC-CAS	62.9%	Test Not Administered	38.88%	59.74%	X		
1.8) 65% to 75% of students passing department math assessments with a "C" or better.	-	48%	78%	69%	X		

<sup>&</sup>lt;sup>1</sup> DCPS, acting as the State Education Agency, changed the standardized assessment from SAT-9 to DC CAS in spring 2006. Therefore, the absence of common data does not allow for an evaluation of the fourth year reading target as stated in the accountability plan.

<sup>&</sup>lt;sup>2</sup> In its December 2006 monthly meeting, the PCSB approved final revisions to the Charter Review Framework for schools undergoing Charter Review. Using DC-CAS P-Value, the percentage of times answered correctly, the PCSB established that a school undergoing Charter Reviews must achieve not less than a school-wide average of middle performance level (50-70% of questions answered correctly) on the DCCAS in reading and mathematics

<sup>&</sup>lt;sup>3</sup> The school did not administer the test because of a compromised test protocol. The school was granted approval to not administer the test.

ACADEMIC PERFORMA	ANCE STANDA	ARDS				
Annual Year Target	Performance/Data Verified				Target Met?	
	Baseline	Year 2	Year 3	Year 4	Y	N
1.9) 75% to 85% of students at 70% proficiency on the technology performance assessment.	-	76%	81%	81%	X	
1.10) 43% to 49% of students participating in national and local competitions	-	-	45% Baseline	33%		X
1.11) 31% to 37% of students participating in field –based educational experiences with 80% accuracy	-	-	67% Baseline	54%	X	
1.12) 49% to 59% of students will pass department science assessment with a "C" or better	-	-	63% Baseline	62%	X	
Attained majority of fourth year annual academic performance targets?					X	
Achieved no less than the middle performance level on DC CAS in reading and math?					X	
Currently meets the State Education Agency's standard for AYP in reading and math?					X	

# **Comments:**

WMST PCS met ten of the twelve academic performance targets. The school met all academic performance standards.

NON-ACADEMIC PERFORMA	Performance/I	Target Met?		
Annual Target	Baseline	Year 4	Y	N
2.1) 87% attendance rate	86%	96.52%	X	
2.2) 75% to 80% of students participating in extracurricular activities	75%	91%	X	
2.3) 23% to 33% of parents participating in school related activities	18%	64%	X	
2.4) 50 % to 60% of staff will meet their professional development goals	52%	60%	X	
School-wide average within 80% of annual targets?				
Attendance targets met?				
Enrollment levels sufficient to sustain the economic viability of the school?				
Re-enrollment of eligible students average 75% or higher for the past two years?  200 – 200 re-enrollment rate =  200 – 200 re-enrollment rate =				

### **Comments:**

WMST PCS met four of the four non-academic performance targets. The school met four of its non-academic performance standards.

#### ORGANIZATIONAL PERFORMANCE STANDARDS: GOVERNANCE - MEETINGS AND BOARD STRUCTURE

4	3	2	1
Exemplary level of development and implementation	Fully functioning and operational level of implementation	Limited development and/or partial implementation	Low level or no evidence of development and implementation
The board holds regular meetings with sufficient membership to meet a quorum and submits copies of all minutes to the PCSB as required. The minutes reflect exceptional governance practices in areas such as policy making and oversight of academic and financial performance through the effective use of committees.	The board meets regularly and submits a majority of the minutes to the PCSB as required, which demonstrate sufficient membership to meet a quorum. The minutes reflect appropriate governance practices, such as policy making, and oversight of academic, operational, and financial performance. The minutes demonstrate the Board's awareness of the school's performance, and that appropriate action is taken, as warranted, with or without a committee structure in place.	The board meets sporadically and submits some of the minutes to the PCSB as required, which inconsistently demonstrate membership to meet a quorum. The minutes provide limited evidence of the Board's familiarity with the school's performance as it relates to academic, operational, and/or financial performance. Committees, if in place, play a limited role in the oversight of assigned responsibilities. The Board does not give full attention to all issues confronting the school, but focuses on only one or two.	The board meets infrequently, and most often with low attendance, and submits few, if any, copies of minutes to the PCSB as required. The minutes reflect poor governance practices in the face of serious academic, operational, and/or financial problems. In particular, the minutes do not reflect evidence of sound decision-making at the Board level to effectively address issues facing the school. Committees are not in place, or are not used effectively. The Board's composition and membership have not been modified to address the school's challenges.

#### **COMMENTS:**

WMST's Board consistently meets on a monthly basis and maintains board minutes that are complete and in accordance with the school's board structure. The board minutes reflect that all sub-committees are high functioning and addressing issues related to establishing policy and oversight of academic and financial performance.

#### ORGANIZATIONAL PERFORMANCE STANDARDS: GOVERNANCE - REQUIREMENT FOR PCSB ACTION

4	3	2	1
Exemplary level of development and implementation	Fully functioning and operational level of implementation	Limited development and/or partial implementation	Low level or no evidence of development and implementation
The school has demonstrated exceptional performance, thereby requiring no remedial action from the PCSB.	The school has demonstrated above average to average performance, requiring minimal remedial action from the PCSB. The school has provided satisfactory responses to the remedial action within the designated timeframe.	The school has demonstrated below average performance, requiring substantial and/or repeated remedial action from the PCSB. The school has provided weak and/or incomplete responses to the conditions set by the Public Charter School Board, thereby failing to adequately respond within the designated timeframe. Given time, the school is able to provide a satisfactory response.	The school has demonstrated failing performance, requiring increasingly substantial remedial action over an extended period of time from the PCSB for issues for which the school has not provided an adequate response. Examples of inadequate responses include failure to submit a response within the designated timeframe, weak and/or incomplete responses that fail to fully respond to the conditions.

### **COMMENTS:**

The school continues to demonstrate exceptional performance requiring no remedial action by the PCSB. WMST responds promptly to PCSB accountability requirements and is very responsive to the reporting guidelines.

#### ORGANIZATIONAL PERFORMANCE STANDARDS: GOVERNANCE - ANNUAL REPORTING

4	3	2	1
Exemplary level of development and implementation	Fully functioning and operational level of implementation	Limited development and/or partial implementation	Low level or no evidence of development and implementation
The board submits timely Annual Reports that fully describe the school's performance in relation to the targets established in its accountability plan. Quantitative evidence of performance is presented and aligned with all accountability plan targets.	The board submits timely Annual Reports that describe the school's performance in relation to the targets established in its accountability plan. Quantitative evidence of performance is presented and aligned with the majority of accountability plan targets.	Although not timely, the board submits Annual Reports within a reasonable amount of time from the due date that describes the school's performance in relation to the targets established in its accountability plan on a limited basis. Quantitative evidence of performance is available for some of the accountability plan targets and/or evidence is aligned with some of the accountability plan targets.	The board submits late Annual Reports that largely fail to describe the school's performance in relation to the targets in its established accountability plan. Quantitative evidence of performance is lacking substantially, either due to a failure to report performance or a failure to present evidence that is aligned with the accountability plan targets. School may have been required to submit an amended or supplemental report.

#### **COMMENTS:**

WMST submits its annual reports in a timely manner and highlights the school's performance in accordance to the accountability plan. The school provides accurate quantitative data with verifiable evidence of performance.

#### ORGANIZATIONAL PERFORMANCE STANDARDS: GOVERNANCE - ADEQUATE RESOURCES

4	3	2	1
Exemplary level of development and implementation	Fully functioning and operational level of implementation	Limited development and/or partial implementation	Low level or no evidence of development and implementation
The board and the school's administration deploy resources effectively to further the academic and organizational success of the school.	The board and administration deploy resources that further the academic and organizational success of the school.	The school's deployment of resources at times contributes to the academic and organizational success of the school.	There is little or no evidence that the school's board and administration work to deploy resources in a way that supports the academic and organizational work of the school.

#### **COMMENTS:**

The board and school's administration deploys resources to effectively further the academic program. The school has relocated into its purchased facility with support being given to improve the school's ability to implement its educational program (i.e. science laboratories, state of the art technology, college preparation). The board and school's administration consistently discusses the acquisition of additional resources (as documented in monthly board minutes) of the school to ensure. Staff has expressed their satisfaction with the availability of resources within Program Development Reviews.

#### ORGANIZATIONAL PERFORMANCE STANDARDS: GOVERNANCE – IMPLEMENTATION OF SCHOOL DESIGN

4	3	2	1
Exemplary level of development and implementation	Fully functioning and operational level of implementation	Limited development and/or partial implementation	Low level or no evidence of development and implementation
Administrators and board members have a strong understanding of the school design and refer to it regularly in managing and governing the school.	Administrators and board members understand the school design, but minimally use it to manage and govern the school.	Most board members and school administrators understand the school's design, but evidence of its use in the management and governance of the school is lacking substantially.	Board members and administrators fail to demonstrate an understanding of the school's design and/or they have failed to use the design in the management and governance of the school.

#### **COMMENTS:**

WMST has improved in this area by focusing its resources on math, science and technology (i.e., curriculum development, resource allocation, professional development). While the school is not operating at full capacity in the actual implementation of the education design, they have established a climate and academic environment reflective of it. This accomplishment is indicative of the high commitment and diligent efforts of the board and the school's administration to transition WMST into a high performing math, science, and technology school.

#### ORGANIZATIONAL PERFORMANCE STANDARDS: GOVERNANCE - LEADERSHIP

4	3	2	1
Exemplary level of development and implementation	Fully functioning and operational level of implementation	Limited development and/or partial implementation	Low level or no evidence of development and implementation
The board has established a school that maintains exceptional performance and stability through its school leader. Changes in the school leader either lead to exceptional performance or have not negatively impacted the school's exceptional performance.	The board has established a school that maintains above average to average performance and stability through its school leader. Changes in the school leader either lead to improved performance or have not negatively impacted the school's existing performance.	The board has established a school that maintains below average performance and lacks stability through its school leader. Changes in school leadership have not led to an appreciable improvement in performance.	The board has established a school that is unstable and maintains failing performance through its school leader. There have been no changes in school leadership in an attempt to improve performance.

#### **COMMENTS:**

WMST has maintained growth and demonstrated exceptional performance (achieving AYP under NCLB guidelines) through its existing leadership. The board has addressed developing a plan that will provide stability and consistency in the transition of the school's principal and assistant upon their retirement. The school has a low turnover rate for teachers and administrators.

#### ORGANIZATIONAL PERFORMANCE STANDARDS: GOVERNANCE – OPERATING WITHIN BYLAWS

4	3	2	1
Exemplary level of development and implementation	Fully functioning and operational level of implementation	Limited development and/or partial implementation	Low level or no evidence of development and implementation
The board's composition and operations are substantially in keeping with its bylaws. Bylaws are reviewed on a regular basis to ensure alignment between operations and bylaws. Appropriate changes are made as needed.	The board's composition and operations are substantially in keeping with its bylaws. Bylaws are reviewed occasionally to ensure alignment between operations and bylaws. Appropriate changes are made as needed.	The board's composition and/or operations are largely not in keeping with its bylaws. Bylaws are reviewed sporadically, if at all, but do not result in changes to ensure alignment between operations and the bylaws.	The board's composition and operations are not in keeping with its bylaws. Bylaws are not reviewed or consulted as it relates to the board's composition and operations.

#### **COMMENTS:**

The school operates within its bylaws and uses them in the decision-making process. As documented in the board's minutes, WMST works toward maintaining a fully-constituted board as designated in its bylaws.

**PERFORMANCE LEVEL:** 4

#### OVERALL COMMENTS - ORGANIZATIONAL PERFORMANCE STANDARDS: GOVERNANCE

The management and governance body of WMST PCS is exemplary. The board's activities establish a stable and viable charter school community. WMST's board has strategically and systemically transitioned the school from a financially challenged school facing constraints in implementing the educational program to one that has established a secure and stable learning environment where students meet academic performance standards. The school has been recognized consistently as one *Newsweek's* Top 100 High Schools in the Nation.

#### ORGANIZATIONAL PERFORMANCE STANDARDS: COMPLIANCE WITH APPLICABLE LAWS, RULES AND REGULATIONS

4	3	2	1
Exemplary level of	Operational level of	Limited development and/or	Low level or no evidence of
development and implementation	implementation and development	partial implementation	development and implementation
School has an exemplary record of	School has a record of substantial	School has a record of partial	School has a poor record of
compliance with applicable laws,	compliance with applicable laws,	compliance with applicable laws,	compliance with applicable laws,
rules and regulations, maintains	rules and regulations, maintains	rules and regulations, maintains	rules and regulations, has ineffective
highly effective systems and	effective systems and controls for	inconsistently effective systems and	or non-existent systems and controls
controls for ensuring that legal	ensuring that legal requirements are	controls for ensuring that legal	in place for ensuring that legal
requirements are met, and is	met, and is currently in substantial	requirements are met, and is	requirements are met, and is
currently in substantial compliance	compliance with relevant	currently in substantial compliance	currently out of compliance with
with relevant authorities.	authorities.	with relevant authorities.	relevant authorities.

#### **COMMENTS:**

The school has been in compliance for entire review period. The school has been deemed within its reviews to have exceptional record keeping practices that ensure substantial compliance with relevant authorities.

# Appendix E

### **Executive Summary**

# Why a conversion from DCPS to Independent Public Charter School?

The Ballou Math Science Technology Academy is an award-winning school within a school located in Southeast Washington serving 150 students with a keen interest in math, science and technology.

The Principal, Teachers, Parents, and Partners of the school have come to the conclusion that the grant of autonomy provided through a charter will provide the freedom, flexibility, and opportunity to significantly expand the enrollment and the influence of this innovative program on public education in the District of Columbia. Working with the AppleTree Institute for Education Innovation, and the Potential National Merit Scholars Program, the solution for the founding group is this application to create the Washington Math Science Technology High School.

There is a crying need for a 420 student math, science, and technology high school in Washington to prepare students for further study and careers in these fields. Technology companies around Washington unequivocally voice their need for a well-educated local work force. The expansion of this educational program, enhanced with the standards, curriculum frameworks, and assessments of the Modern Red Schoolhouse Institute, promises to revitalize the perception of public education in the District of Columbia. As a charter school, many innovative relationships can be explored to bring opportunities together with those inner city students in attendance. Free to reallocate resources, the school will seek new and better ways to educate students, manage taxpayer dollars, and improve the potential of the lives who pass through its doors.

Innovations with the kind of scale envisioned by the founders simply cannot (and would not) be attained within the confines and bureaucratic limits of the DCPS central administration.

Washington Math Science Technology High School, as an innovative charter school, seeks to demonstrate effective ways of teaching math and science which most schools are not prepared to employ.

Technology will be an integral part of the school's fabric. Instruction, management of instructional systems, community outreach, internal communication, and parental involvement will all be augmented by the effective, coordinated use of technology.

The case for this conversion is to provide the freedom to encourage a good school to become a great school providing a rigorous academic program to 2 1/2 times the students it can today. This conversion will demonstrate to a wider audience how autonomy and research-based whole school redesign can provide a more effective education for students everywhere.

#### A. Educational Plan

## 1. Mission and Purposes of the Proposed Public Charter School

a. Educational Needs of the Target Student Population: Discuss the grade or age levels of the student population your school plans to serve. Describe the characteristics of your prospective students, including those likely to have special needs. Briefly discuss the educational needs of these students and describe what is special and promising about the way your school will address these needs. Explain the relationship between the student population to be served and the geographic area of the city where you intend to locate your school. See §2202(2), DC School Reform Act. In the context of the needs of the target student population, explain your rationale for the proposed enrollment level in 1998-99, and discuss your expectations for the development of the school to its full capacity and potential.

Secondary education in the District of Columbia needs dramatic improvement to meet the needs of all students. As citizens who believe children are our future, we cannot tolerate the present drop out rates of 25% or more among public high school students.

The Washington Math Science Technology High School (The School) will serve students in grades 9 through 12 from throughout the District of Columbia. The D.C. Financial Control Board, in its report on public education in the District of Columbia, illustrated that the longer students remained in DCPS, the worse they performed academically. Students will be admitted to The School for a course of study emphasizing math, science, and technology.

We expect the characteristics of our prospective students to resemble the characteristics of the school-aged population of the District of Columbia. Quite frankly, we do not expect a majority of our applicants to be prepared to thrive in a rigorous, standards-based academic environment. We expect many applicants to be dealing with the challenges of socioeconomic conditions in their neighborhoods. We expect to spend more time and effort to meet these students' academic and personal challenges in the first year as they assimilate to a more rigorous program. It is our expectation that a variety of diagnostics teaching methods and strategies will be employed to bring entering students up to grade level expeditiously. We will rely heavily on mentors, tutors, teaching assistants, and corporate partners to provide a strong and resilient support system sufficient to help them thrive.

We expect that our students will express an interest in math, science, and technology. We understand that many of them will not be prepared, upon admission, to perform at the levels of our 9th grade standards. No entrance exam will be administered to entering students, but we will make clear to

parents and students through our individual education compacts (IECs) that The School will offer a rigorous program and that expectations for all who attend will be high. We expect that any student prepared to work and invest time and effort can meet the standards of this school.

We will have to work harder to meet the needs of our urban families. Toward that end we plan to offer an extended school day and longer school year, with wrap-around study and enrichment programs intended to offer a safe and challenging learning environment for students up to 12 hours per day. Our school day will begin at 9:00 am and end at 4:30 pm. Our school will be in session 206 days per year. The additional time spent in school will provide the equivalent of an additional 15% of classroom time over the four years of high school. This additional time will be needed to provide the extra instruction necessary to bring all students up to the high standards of the Modern Red Schoolhouse whole school design and The School. We will be open on school vacations for activities and for study-related activities. We will make our school available to community organizations, parents organizations, and partners for adult education, activities and meetings.

We expect our school to be located centrally in the District of Columbia to ensure that a diverse and broad city-wide enrollment is attained. The central location will make it easier for students throughout the city to attend the The School via Metro. The central location will also encourage and facilitate the significant participation from mentors, tutors, and corporate partners we need to be successful, and will enhance The School as a model research, development and training center for the District.

Ballou Math Science Technology Academy, as a DCPS school within a school, serves approximately 150 students at the Frank W. Ballou Senior High School at its 4th Street, SE location. The present location cannot accommodate an expanded program, nor can it accommodate the capital improvements which are desired to provide the quality of education we intend to provide. It has been decided by parents, teachers, and school leaders that this program could prepare students better in a facility developed to meet the needs of the educational program. We are committed to maintaining and expanding the number of children from Southeast Washington, DC who attend The School. Transportation, free of charge, will be made available to students from Wards 7 & 8 who are admitted to the school. Outreach will be focused at the elementary and middle schools in Southeast Washington, DC which send many students to The School.

At full capacity, the school will serve 400 to 420 students in a full-time, day education program. Potential growth will include an evening program a mathematics learning diagnostic center open to all students on a fee-for-service basis and a full learning center for tutoring, PSAT and SAT test preparation, National Merit Scholarship and National Achievement Scholarship preparation and teacher professional development in math and science.

**b. Mission and Philosophy:** Please provide a one-sentence statement of the mission of the proposed public charter school. Also, briefly state the philosophy upon which the program of this school is based. See §2202(1), DC School Reform Act.

#### The Mission

To provide a rigorous education, integrating mathematics and science instruction with technology, that will enhance analytical reasoning development and result in highly-motivated, successful students prepared for further study mathematics, science, or technology and related careers.

The academic design of the school rests upon six basic tenets:

- All students can learn and attain high standards in core academic subjects. Students simply vary in the time they need to learn and the ways they learn best.
- Schools should help transmit a common culture that draws on the traditions and histories of our pluralistic society and the principles of liberal democratic government that unite us all. At the same time, other nations and peoples should also be understood by all children.
- Principals and teachers should have considerable freedom in organizing instruction and deploying resources to meet the needs of their students.
- Schools should have greater flexibility in deciding how best to accomplish their mission and, at the same time, should be held accountable through regular assessments of student progress.
- Advanced technology is a critical requisite to attaining high quality education in cost-effective ways.
- Schools should be places where students and staff choose to belong.

**c. Educational Focus:** Describe any areas of concentration (e.g., mathematics, science, the arts); student needs (e.g., early childhood, students with disabilities, gifted and talented, bilingual/multicultural); grade levels or age levels, or other instructional groupings; or themes (e.g., technology, sports and health, international studies) on which this school intends to focus. See §2202(3)(A), DC School Reform Act.

The Washington Math Science Technology High School will provide college bound students in grades 9 through 12 with an academically rigorous curriculum. It will prepare non-college bound students entering the world of work with academic skills and training necessary to find employment upon graduation.

We will link inner city students interested in math, science, and technology with emerging technology companies surrounding the District of Columbia through exchanges, partnerships, programs, projects, mentoring, tutoring, internships, and school to work programs.

Our goals are aligned with the goals of the District of Columbia Public Schools' Mathematics, Science and Technology Initiative:

- To improve the scientific and mathematical literacy of all of its students.
- To prepare all of its students for lives of economic independence and personal satisfaction.
- To enable a significantly greater number of its students to pursue careers in mathematics, science and technology.

Students will have the unique opportunity to study and engage in scientific experiments in laboratories throughout Washington including the Discovery Lab at Catholic University, the Greater Southeast Health Care Systems, the Challenger Center at Jefferson Junior High School, the Naval Research Lab. and the National Institute of Health. The students will participate in science-related programs locally and nationally such as NASA Space Camps, and special precollege summer programs sponsored by universities and colleges. A variety of innovative science, mathematics and computer science courses will be included in the curriculum. An awards program is established. Students can receive points for reading selected recommended books and taking examination on same; academic achievement, and mastering foundation units. Students will be given awards at award assemblies based on their accumulated number of points. Guidelines will be given to and reviewed with each student. Any student with a high level of interest in mathematics, science, and/or technology will be invited to apply.

**d. Goals:** List the goals this school will seek to achieve and against which you wish to have the school's performance measured. You may include both academic and nonacademic goals. See §2202(1), DC School Reform Act.

The goal of the Washington Math Science Technology High School is to prepare graduates for work and life in the 21st century by providing them with a rigorous, standards-based academic program.

• The School will identify students interested in mathematics, science and technology-related careers, and prepare them as measured by their performance on PSAT/SAT1/SAT2/College Placements, scholarships to colleges and universities, and ranking in local and national level examinations.

In Section D - Accountability Plan under Goals, Standards of Performance, and Measurement, we have detailed specific and fair indicators of success and measurements by which we may be judged.

Additionally, we have four annual goals which we would expect to achieve year after year among public school students in the District of Columbia:

- Highest Overall Scores Twelfth Grade Mathematics
- Highest Overall Scores Eleventh Grade Mathematics
- Highest Overall Scores Tenth Grade Mathematics
- Highest Total Gains in Ninth Grade Reading and Mathematics

These goals will reflect high academic achievement as compared to other public schools in the District of Columbia. It is our hope to instill friendly competition with other public schools which will result in better educational opportunities for all.

Evaluation Criteria: Reviewers will look for the degree to which the vision of the proposed public charter school-

- 1. responds to the needs of the target student population;
- 2. is based on a clear mission that is philosophically grounded; and
- 3. is reflected in goals that are clear, challenging, measurable, and fair.

## 2. Academic Design

a. Student Content and Performance Standards: Please submit any statements of student content and performance standards your school already has adopted. If student content and performance standards for your school have not been developed already, describe the process and time line under which a comprehensive statement of such standards for all students, including language minority students and those with disabilities, will be established for your school. These standards should cover both academic and nonacademic areas of the curriculum. By September 1998, the District of Columbia Public Schools plans to have in place a full set of student standards at every grade level.

Describe how you will make sure that the standards you establish will be the equivalent to or exceed any standards adopted by the District of Columbia Public Schools.

Nonacademic areas of the curriculum might include such things as problem solving skills and techniques, the ability to work constructively with others, and personal responsibility. Discuss how your non-academic goals will contribute to high academic achievement.

The Washington Math Science Technology High School will use the Modern Red Schoolhouse academic standards as the foundation for its curriculum in eight core subjects defined as fine arts, English language arts, foreign languages, geography, health and physical education, history, mathematics, and science. Students will be considered to have mastered the academic standards as they proficiently pass specific performance objectives tied to these standards. Performance objectives are written in each of the individual curriculum units or Foundation Units described below.

The Modern Red Schoolhouse standards are the combined thinking of teachers, administrators, community members, and national subject specialists. The College Board's Advanced Placement Standards were used as an initial benchmark to help participants articulate what students should know and be able to do at the time of graduation from high school. Although students in Modern Red Schoolhouses are assumed to achieve these standards at different rates, therefore at different ages, the three levels are roughly equivalent to what students should know and be able to do in grades 4, 8, and 12.

The designers of the Modern Red Schoolhouse standards borrowed heavily from other sets of standards developed in recent years in the great national effort to reform America's schools. Noted contributors include the National Assessment Governing Board, whose National Assessments of Educational Progress in language arts, geography, mathematics, science, and the arts were used. The authors also drew from the College Board's various

teachers' guides for their Advanced Placement courses as well as from standards from the Association of American Geographers, the Bradley Commission on History in Schools, the National Center for Teachers of Mathematics, the American Association for the Advancement of Science, National Standards in Foreign Language Education project, and the National Association for Sports and Physical Education. In addition to these, the standards were informed by the U.S. Department of Education's "James Madison" series and the Secretary's Commission on Achieving Necessary Skills (SCANS) reports of the U.S. Department of Labor. Standards for the primary and intermediate levels were also informed by E.D. Hirsch's "Cultural Literacy" inventory and Smart Start.

Below are some examples of standards students will achieve in the Washington Math Science Technology High School:

#### **Mathematics**

- Each student uses reason and logic to evaluate information, identify relationships, perceive patterns, formulate questions, pose problems, make conjectures, and pursue ideas that lead to further understanding and deeper insight.
- Each student uses a variety of approaches--numerical, symbolic, graphical, statistical, for example--to investigate and solve complex problems within and outside the field of mathematics, including problems posed by the student for the purpose of making and testing generalizations.
- Each student can analyze non-routine problems and arrive at solutions by various means, including models and simulations, often starting with provisional conjectures and progressing, directly or indirectly, to a solution, proof, or counter-example.

#### Science

- Each student can develop questions that can be explored experimentally, find relevant information in the literature, refine the questions, build a set of hypotheses, and relate these hypotheses to current scientific knowledge.
- Each student can decide what data are needed to test a hypothesis, identify instruments and tools needed to collect the data, and make (or modify) instruments when resources permit.
- Each student can control variables, manipulate and measure one selected variable, collect and record data, determine patterns of variation in data, evaluate the precision and accuracy of data, critique experimental procedures and, when appropriate, improve an experimental design.

#### English

- Each student can draw on a broad base of knowledge about American, British, European, and non-European literature and recognize the conventions associated with the literature of certain historical periods and cultures.
- Each student can edit a manuscript to correct problems of usage, grammar, spelling, punctuation, format, and style.
- Each student can evaluate the use of diction, syntax, figurative language, rhetorical structures, and linguistic conventions according to the context and purpose of a communication.

#### History

- Each student can select certain historical events and, using data gathered from a variety of sources, explain their relationship to or effect on the modern world.
- Each student can identify, cite, and discuss important historical documents that have influenced government in the United States and explain the nature of their influence.
- Each student can recall, select, apply, and analyze knowledge of the expansion of civil rights in the 19th and 20th centuries.

### Geography

- Each student can use a map or globe to locate complex natural features (such as river systems, continental divides, and watersheds), historic and cultural features, and regions (such as the Fertile Crescent, the Great Wall of China, and the European Economic Community).
- Each student can locate concentrations of selected natural resources on a map and show how their unequal distribution generates trade, encourages interdependence, and shapes economic patterns.
- Each student understands the general dynamic of geographic movement and can predict the changes resulting from a major population relocation, an epidemic, a natural disaster, a media broadcast, or the transportation of raw materials and finished goods.

The entire list of Modern Red Schoolhouse academic standards for the Primary, Intermediate, and Upper levels are supplied in the <u>Appendix</u>. We have compared the Modern Red Schoolhouse standards to those of the New Standards Project which are prescribed by the District of Columbia; all DCPS standards not specifically covered by the Modern Red Schoolhouse standards will be incorporated into the school's curriculum.

b. Curriculum: Provide an overview of the curriculum that will be used by the school, including the objectives, content, and skills to be taught in the main subject areas at each performance level (grade level, age grouping, etc.) in your school. If your school will have a particular curriculum focus (e.g., mathematics and science, the arts, the humanities, career exploration), explain how the focus will be integrated across all curriculum areas. Discuss how the curriculum you have chosen is consistent with the mission and philosophy of the school and will lead to the accomplishment of the school's goals. Also discuss the suitability of the curriculum for language minority youngsters and students with disabilities.

Our teachers will write the school curriculum in the form of curriculum units or Foundation Units. Additional, sometimes more comprehensive curriculum units have been developed by outside contractors and will be used as part of the cumulative assessment of student progress. These units are called Capstone Units and are administered to students as part of their Watershed Assessments prior to graduation.

#### **Foundation Units**

The Washington Math Science Technology High School teachers, along with curriculum consultants, will author a series of Foundation Units to meet the individual learning needs of each student. All performance objectives (objectives correlating and building to the standards) of all of the Foundation Units successfully completed by each student will lead that student to achievement of the Modern Red Schoolhouse standards and the DCPS standards.

Foundation Units will be developed by the staff and curriculum consultants at The School, beginning in March of 1998 before the conversion into a charter school and will be expanded in number and scope consistently thereafter. These Foundation Units are developed for the primary purpose of instruction, although Foundation Units will also include some built-in assessments. Teachers at Washington Math Science Technology High School will have written two-thirds of the Foundation Units before the first school day. The remainder will be written during teacher professional training days during the first two quarters of the year. They will be refined during the following summer both during and after the Modern Red Schoolhouse summer institutes. A generic outline of a Foundation Unit can be found in the Appendix.

#### Capstone Units as part of the 'Watershed' Assessments

Capstone Units are culminating instructional units in which students review material already learned, learn new information, and demonstrate understanding and mastery of concepts and skills learned. Capstone Units' primary purpose is to assess students' academic progress, but because they are integral to the curriculum, they also will include some built-in instruction.

Capstone Units have been developed by an assessment contractor, Advanced Systems, Inc., in collaboration with seasoned Modern Red Schoolhouse teachers at public schools around the country. The cumulative assessment of student mastery (Watershed Assessment) is performed at the twelfth-grade level, using a combination of Capstone Units and subject examinations. Students will not graduate without demonstrating mastery.

The skills incorporated into the foundation units will include those specified by the District of Columbia Essential Skills as well as those work force competencies defined by the U.S. Department of Labor, namely that students will be able to allocate time, money, and other resources; use technology; evaluate and process information from a variety of sources; work with others; and understand, monitor, improve, and design social, organizational, and technological systems. There will be no separate work force skills in our charter school. Students will participate in and sometimes design projects as part of their foundation units that will develop these competencies.

The curriculum will provide graduates of Washington Math Science Technology High School with the knowledge and skills they will need to succeed in adult life. While there will be an emphasis on math, science, and technology, the curriculum will provide solid academic preparation in the humanities. This whole school design meets the needs of our school because it is based on rigorous content and performance standards, with a curriculum and assessments aligned to the standards.

The emphasis on math, science, and technology is intended to provide interested students with additional resources to pursue higher education or careers in these subject areas. These resources come in the form of corporate partnerships, internships, mentoring relationships, advanced study programs, and access to scientists, entrepreneurs, and scholars. The Washington Math Science Technology High School presently has over 20 corporate partnerships (see <u>Appendix</u>) with organizations including MCI, the National Institute of Health, and Catholic University. Additional partnerships are anticipated with the Smithsonian Institution and National Science Foundation.

An Individual Educational Compact (IEC) (see <u>Appendix</u>) is the primary tool for monitoring the continuous progress of every student. The IEC also facilitates responsibility and accountability. The IEC is an agreement negotiated among the student, the parents, and the advising teacher. It is an educational road map for the student over a specified period of time. It has three major functions: establishing measurable goals for the student,

identifying the responsibilities of the parents and teachers in helping the student reach the standards, and identifying special assistance or services the student will need from school, parents, or community to achieve his or her goals.

The Modern Red Schoolhouse design is based on the expectation that all students will attain high achievement standards, though they will not all learn in the same way, in the same time, or at the same pace. The IECs of language minority students and students with disabilities will identify appropriate resources required for those students to succeed.

Language minority students and students with disabilities will be welcome at the Washington Math Science Technology High School. It has been the experience of other public schools which have converted to independent public charter schools that these challenges can be managed well and cost-effectively with a less-bureaucratic, flexible, more personalized approach to management.

The founding group believes that many students are identified as learning disabled who might otherwise be educated in a mainstream environment. Special education costs can be lower at a charter school. Most parents prefer that their children remain in a regular classroom as long as their needs are promptly evaluated and that appropriate, timely modifications are made to the classroom to accommodate those needs. The considerable freedom and flexibility granted to charter schools will provide our school with alternative personnel and delivery strategies which may deal more effectively with these critical issues.

"Structured immersion" is an alternative practice to transitional bilingual education (TBE), the prevailing pedagogy for most school districts. According to a recent federal study, a significant percentage (41%) of parents with children in TBE programs wanted their children to be taught only in English.

In fact, The Washington Times reported on August 7, 1997 that Fernando Vega, a longtime leader of California Hispanic Democratic activists, is serving as the Chairman of an organization called 'English for Children' which is mounting an initiative campaign against bilingual education. The initiative mandates that all students in California public schools be taught in English and placed in English language classrooms. "I helped create our local bilingual education program because I believed it would be best for Hispanic children," Mr. Vega said. "But now, after many years of trying, it is obvious that bilingual education just doesn't work. There is no shame in admitting that you once supported a program which you now see doesn't work in practice. What is shameful is that so many politicians and other officials continue to support such a program year after year."

Under a structured immersion program children learn English by immersing themselves in the spoken and written language rather than learning a few minutes of English per day. The immersion is structured because the complexity of the English used is aligned to the student's level of comprehension. Simple English is used at first and more complex English follows as the student gains confidence, fluency, and comprehension. The student's native language is used to clarify instruction and to provide a reassuring connection to the student's home language and culture. Positive results have been achieved in states including Florida, Texas, and Virginia. Students learned English faster and better and reduced, significantly, the time before they were mainstreamed into regular classrooms.

The School has an advantage in the successful implementation of such a program in that several existing members of the faculty have multidisciplinary backgrounds and responsibilities and are fluent in French, Spanish, German and Persian.

Washington Math Science Technology High School will seek any waivers necessary from the SEA to permit it to offer structured immersion instruction to its language minority students.

- c. Methods of Instruction: Briefly describe the instructional methods to be used, including any distinctive instructional techniques or approaches to be employed, such as cooperative learning or uses of technology. Describe any special models of instruction, adaptations of classroom management, or service delivery strategies that will be used to accommodate students with special needs, including gifted and talented students, language minority students, and students with disabilities. Describe how you will handle the referral, evaluation, and placement of students with disabilities. Discuss how the pedagogues you propose will provide students with the knowledge, proficiency, and skills needed to perform at high levels and how these pedagogues will help produce the educational outcomes anticipated in your goals. See §2202(3)(B), DC School Reform Act.
- 1. Diagnostic Interviews of Entering Students. When students enter the Washington Math Science Technology High School, they will be interviewed with a focus to identify a particular interest area. Sometimes the work they have done can be reviewed for clues. The student is asked what has baffled them about math. They are then taught "on the spot" proficiency in that area using one of a variety of instructional methods. Students are amazed and they leave the diagnostic session in a very positive and more confident state of mind. A barrier many schools have in teaching math effectively is: Most students who struggle with math have never been diagnosed.

- 2. Multiple Instructional Strategies. Teachers in the Washington Math Science Technology High School will use instructional strategies that are to be adapted to the individual needs of learners. The salient features will include an emphasis on analytical reasoning skills in all subject areas; integrated instruction; careful monitoring of student progress; instruction of students on varying levels; provision for active, engaged instruction; high expectations of all students; high levels of parental involvement; a variety of opportunities in and out of school for student participation; regular awards programs to recognize student achievement; extended study opportunities in biotechnology, space, science and environmental science at nearby universities, agencies and corporations; continuous staff development through classes on site and at other locations; the use of a communications laboratory; articulation with feeder elementary and middle schools; and an accountability system for administrators, teachers and students.
- 3. Interdisciplinary Study. Foundation Units will outline for teachers, students, and parents the actual content and skills that teachers will teach and students will study along a particular theme. Many will be interdisciplinary in their design, combining history with geography or science, for instance, or English language arts with mathematics. Below is an example of a Foundation Unit reflecting this interdisciplinary approach:

"Each student can explain the structure of certain passages of literature from various historical periods and cultures, illustrating the author's use of syntax, images, figures of speech, literary and cultural allusions, symbols, irony, and other devices in the context of history, culture, and literary style."

Teachers will use these units as the driving portion of their daily "lesson plans," yet by virtue of their composition, the units allow for a significant amount of flexibility for the teacher in developing appropriate learning environments for each student as they progress through the several activities offered steering them toward meeting the Modern Red Schoolhouse standards.

### 4. Continuous Progress

Students do not master the understanding of content and skills at the same time. The School's approach to the delivery of the curriculum is to allow the student to make continuous progress in accomplishing the performance objectives that lead to the mastery of the Modern Red Schoolhouse standards.

Each student in the Washington Math Science Technology High School will have developed an Individual Education Compact (IEC) with his/her teacher/advisor with whom they will work in an advisor/advisee relationship during the full course of his or her first term. Parties to the IEC will include the teacher/advisor, the student, and the student's parent, guardian, mentor or adult willing to take a personal interest in the child's academic success. The IEC will be the educational 'road map' of the performance objectives to be mastered by the student, all clearly connected to the Modern Red Schoolhouse

standards. Work within Foundation and Capstone Units will be outlined in the IECs.

Teachers at The School will provide the environment, tools, and coaching to help students achieve these performance objectives. Individually paced learning does not mean that students will learn at their own leisure. The School's structure will push students to experience continuous progress in their learning by taking the following steps:

- a) Learning teams. During the first year of The School, there will likely only be one or possibly two learning teams. Four teachers per team will be assigned to 80 students of various ages and performance levels for the full time students are at the school. They will be assigned various teachers on the team during the course of the day, depending on their performance level and depending on the focus of discipline being taught by the individual teacher. One teacher will, for instance, lead instruction in a particular Foundation Unit covering the sciences and history, yet another may lead one with an arts and English language arts focus. Sophisticated management of student progress will be required for this strategy. The instructional software system to be adopted (outlined later in the technology explanation of this section) will greatly assist teachers in this management process.
- b) Upgraded classrooms. Using thematic instruction in the afternoons for all of the core subject areas, students, usually of different ages, will work in the same classroom on different Foundation Units covering the same topic, such as ancient civilizations or American history. This is not to say that in some instances, a Foundation Unit will not engage an entire classroom of students of varying performance levels in the same activity, i.e. watching a student-authored and acted play by the French author and poet, Moliere. Many instructional as well as performance activities may be done as a group, as often as individual practice of skills, demonstration of knowledge, and completion of projects will occur in any one classroom. Using this approach to structuring approximately one-half of each school day (the other half for performance grouping in reading instruction and mathematics skill instruction), each student will achieve the same high standards but at different rates and, perhaps, ages.
- c) After-school studies. Students who need additional learning time or who want to progress faster will be offered The School's after-school studies program or will be assigned individual projects that can be pursued independently after school. SAT preparation programs will be offered.
- <u>d) Summer Studies.</u> A student whose progress lags behind appropriate expectations of his or her parents or guardians will be allowed to work on Foundation Units under the supervision of a teacher, parent or mentor during the summer months. When a student returns to The School in the fall, he or she will complete critical assessments to establish the level of mastery obtained during the summer.

- e) Project-based learning. A portion of the day will be assigned to project-based learning, where students, alone or in groups, will work to complete a project that addresses one or more Foundation Units.
- f) Individual tutoring. Teachers will dedicate time to individual and small group tutoring for students with special needs.
- g) Student use of computers. Students will use the computer as a research tool fairly frequently. They will be able to access and enter data for analyzing scientific and historical issues. They will begin to evaluate their own progress in academic subjects and learn to identify areas of learning that will help to improve their own performance and mastery of essential skills.
- h) Small group tutorials and self-directed learning projects. Expectations specific to each student will determine the appropriate learning strategy. Mastery of Foundation Units will guide the structure of learning.

# 5. Technology as an instructional management tool for teachers and tool to enhance student learning.

Technology is an essential tool for all of the elements of the The School. The School will use systems of communication, operated by a Local Area Network (LAN), which will link all classrooms within the building together and with the outside world. Such systems will include personal computers in each classroom, a voice system which will handle telephone-related functions for teachers (including voice mail and a homework hot line), and a video distribution system which will allow teachers and students to view, produce, and present video programming such as broadcasts distributed by NASA, or other live presentations of occurring events that tie into the curriculum. Personal computers will be installed into every classroom (the goal being six per room) and will be used by both the teachers and students. Teachers will use personal computers to write and implement the curriculum, as well as monitor student progress toward achieving the standards. Students will use personal computers to assist them in their learning, whether it be to practice skills, draft documents for a written piece of work to be graded, or perform research for a project--all part of their Foundation Unit or Capstone Unit work.

## Instructional Management System

One of the most crucial instruments of technology to be used by The School will be an Instructional Management System (IMS) that will allow teachers to develop, implement, and monitor the core curriculum. Teachers will develop Foundation Units tying all performance objectives to the Modern Red Schoolhouse standards. All performance objectives, performance levels, and standards will be input (by a technician) into the IMS so that from this database, teachers may not only write a coherent set of Foundation Units, but also process Individual Education Compacts (IECs), an instructional plan for each and every student. The IMS will also allow teachers and the principal to

produce Student Reports of individual progress in achieving the standards and School Reports which can tell the community and public in general about the progress of the school.

The system of managing when each performance objective appearing in an individual Foundation Unit (which in turn is tied to the eventual mastery of the standards) is achieved by each student during the course of his or her daily or weekly work can only be managed effectively in this way. The IMS will allow teachers to electronically collect, store, and track quantitative (test scores) and qualitative (videos of performances, writing samples, etc.) data on student learning.

## 3. Student Performance

a. Student Assessment: Describe the proposed methods for assessing student performance against the academic and non-academic goals you have set or will be setting. Please include the baseline standards of achievement, the outcomes to be achieved, and the method(s) of measurement to be used. See §2202(5), DC School Reform Act. In addition, describe the manner in which the school will participate in district-wide assessments. All public charter schools will be required to participate in any district-wide assessments conducted by the District of Columbia Public Schools. See §2202(1), DC School Reform Act. Describe how assessments will be used to tailor instruction to student needs.

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Assessments in The School will occur on several levels and will be both formal and informal in nature. A variety of diagnostic and standardized tests will be administered, which will allow The School to make national and state comparisons for ourselves and the community, as well as tests designed specifically to measure student progress in achieving the Modern Red Schoolhouse standards.

## Baseline and Year-End Tests in Reading and Math

Baseline tests in Reading and Mathematics will occur each year for each grade. The District of Columbia School Reform Act of 1995 requires charter schools to use the same district wide assessments conducted by the DCPS.

#### Watershed Assessments

In order to assess and track students' progress in achieving the Modern Red Schoolhouse standards, The School will administer a Watershed assessment, a unique assessment of the Modern Red Schoolhouse model. Watershed assessments consist of approximately twelve <u>Capstone Units</u> and five <u>subject exams</u> which demonstrate mastery of the standards of the Upper division. The School will administer four Capstone Units and one subject exam to students prior to graduation.

Watershed assessments are **exit exams**. Each student at The School will need to successfully complete these assessments before receiving a diploma. A diploma from Washington Math Science Technology High School will be a certificate of proficiency in reading, writing, reasoning, computing, communicating, and citizenship. Capstone Units and the subject exams constitute the critical evaluations that will allow our teachers and parents to determine whether our students are mastering Modern Red Schoolhouse standards. Capstone Units and subject exams will be the same among all the Modern Red Schoolhouses in the country.

## **Capstone Units**

Capstone Units are designed by Advanced Systems, Inc., a nationally recognized testing company. They constitute the "authentic" method of assessment in the Modern Red Schoolhouse design by including a series of student learning activities coupled with assessments that provide products for a student's portfolio and information on a student's mastery of some standards. For each Capstone unit, prerequisite skills have been identified. This will allow our teachers to determine when a student is ready to begin the unit. Students completing a Capstone Unit may be required, for example, to conduct investigations, prepare reports, or deliver speeches in a way that shows that the student understands the set of standards and their application to everyday life. After completing several Capstone Units, one of our teachers may determine whether a student is ready to sit for one or more subject exams. All will be completed by students prior to graduation.

## **Subject Exams**

Subject exams are traditional examinations also designed by Advanced Systems, Inc. in consultation with school districts participating in the early stages of the Modern Red Schoolhouse project. For each subject, there are forty multiple-choice and eight open-ended questions. Exams have been created for mathematics, science, English language arts, history and geography. They are constructed as criteria-referenced tests and administered only when teachers anticipate that a student can demonstrate mastery of a given subject area. We expect, on the basis of this procedure, that a high proportion of students will pass these exams. These exams are high stake exams in the sense that students are required to complete them before they graduate. Advanced Systems "grades" and maintains the record for these exams.

#### **Remediation**--Extended Paths to the Standards

The Washington Math Science Technology High School does not adhere to the notion that students need to be "remediated" simply because of our belief that all students can achieve the academic standards and vary in both the time it takes them to achieve them and the ways in which they achieve them. The staff at The School realizes that we must take students from wherever they are educationally, to where they need to go. When a large number of students in the school need to learn a large number of additional items to get them started, those students will need extra time to get back "on track." They need an extended path.

Criterion referenced tests administered in the beginning of each year will aide our teachers in identifying individual students' needs so that we can create series of Foundation Units that will best address each student's needs at a given time.

**b.** Basis for Promotion and Graduation: Describe your policies and standards for promoting students to the next grade, achievement level, or grouping level. What standards must a student meet to be eligible for graduation from your school (if applicable)?

As described in the section which preceded this, students will progress when and **only** when they demonstrate mastery of the subject material evidenced by the assessments which are aligned with the foundation and capstone units. Graduation will occur only when a student has passed a watershed assessment which demonstrates mastery of the high school program. The standards which a student must master in order to pass the watershed assessment are listed in the he Appendix. During the first three years of the The School, although a rigorous academic program will be implemented, students will graduate without full mastery of the standards. The first group of 9th graders who enter the The School with an understanding of the standards based curriculum will be the first held accountable to the full standards implementation.

**c. Student Intervention:** Describe how you will work with students who are not reaching your stated performance standards. Describe the steps you will take to intervene before students become dependent on remediation. See §2202(5), DC School Reform Act.

We fully expect to diagnose problems, intervene early and often to provide students with additional assistance to master the rigorous academic standards which will be implemented after the conversion to charter school. As discussed, our extended school day and extended school year are inherent parts of our strategy to provide extra time and assistance to students to master the material. Key components of monitoring the continuous progress of students are the Individual Education Compacts (IECs) and the successful implementation of the IM Series instructional information management system. The premise of the IM Series system is for significant, meaningful, long-lasting school reform to occur, practitioners must be able to "unobtrusively, continuously, and automatically collect critical information that is associated with teaching and learning. Practitioners must manage and analyze that information to help them understand and improve instruction and instructional programs. The system empowers the practitioner as a professional, decision-maker, and problem solver by linking every part of the instructional process together.

The IM Series system recognizes that schools are complex systems requiring a sophisticated information infrastructure to support its mission. At its core, IM Series is a powerful database that serves as a central nervous system of the educational organization--allowing information to flow freely and on-demand

among the many people who must work together to ensure each child's mastery of rigorous academic material.

Standards, curriculum, instruction, assessment, and evaluation may be aligned to achieve superior student outcomes. The five steps which underlie the instructional process are:

- <u>Standards</u>: Establishing the content, processes, and thinking skills that the Washington Math Science Technology High School wants students to master.
- <u>Curriculum</u>: Planning and organizing the learning experiences that enable students to meet those standards.
- <u>Instruction</u>: Carrying out the learning experiences specified in curriculum through the creativity and skill of dedicated teachers.
- <u>Assessment</u>: Determining to what extent instruction has enabled students to learn what's specified in curriculum.
- <u>Validation</u>: Exploring and analyzing what worked and what didn't so as to make informed changes in the instructional process.

#### **Evaluation Criteria:**

## Reviewers will look for the quality of-

- 1. an assessment plan that features multiple measures of student outcomes; and
- 2. the strategy for how assessment results will be used to make adjustments in instruction;
- 3. assist in decisions about student grouping, promotion, and graduation; and
- 4. improve student outcomes.

## 4. Support for Learning

a. Parent Involvement: Describe how you propose to work with parents so they have the information and training they need to better support and become more involved in their children's learning. Describe the role teachers, administrators, and other school staff will play in making sure that all parents are welcomed to the school and are encouraged to participate in decisions about their children's education. See \$2202(14), DC School Reform Act.

There is an immense amount of orientation, participation, and training inherent in the Modern Red Schoolhouse whole school design, which will be undertaken to ensure that every parent or guardian understands his or her role and responsibility in making the school a success. A series of informational meetings will be held with parents and guardians after the charter has been awarded to familiarize them with the planning and transition schedule, to help realize our vision of participation.

Because school attitudes and actions toward parent involvement are largely influenced by administrators and teachers, the principal will be prepared, supported and encouraged by the school leadership to promote family-school partnerships. To promote such a partnership, Washington Math Science Technology High School will develop a **family-school compact** for learning. The compact will seek to capture and sustain the effort for a successful partnership.

The Goals of the Family-School Compact are to:

- interest educators in promoting family involvement
- encourage and train educators to skillfully promote family involvement
- · make educators and parents aware of the benefits of parent involvement
- facilitate communication between educators and parents through technology
- involve 75% of parents in one form or another of teacher-parent partnership
- increase student achievement because of greater parental involvement
- improve student attitudes because of greater parental involvement

To reach the goals of the family-school compact for learning, educators at Washington Math Science Technology High School will:

- seek out opportunities for professional development and training in parent involvement.
- · make parents feel welcome in the school.
- provide a parent center for parents to use while at school.
- reach out to parents whose first language is not English.
- learn about the various ethnic, cultural and socioeconomic backgrounds of the students and know how to communicate with diverse families.
- accommodate parents' work schedules when creating parent involvement opportunities.
- assign homework projects that engage each child's parents and family and make learning more meaningful for the student, such as family history, interviews with grandparents, or descriptions of parents' daily work.
- use technology, telephone calls, newsletters, conferences, meetings and Individual Education Compacts (IECs) to keep parents informed of their children's performance and school activities.
- provide clear, practical information on home teaching techniques for parents of children who need extra help at home.
- provide opportunities for parents to visit the school, observe classes, and provide feedback.
- start the school year with an opening conference.
- invite and recruit parents to serve on school task forces and Board.

**b. Community Participation:** Describe the relationship your school intends to build with community agencies and organizations, such as health and social services, that serve children and youth who attend your school. Discuss any commitments you have for partnerships or other relationships with community organizations or individuals that would enrich the learning opportunities of students in your school.

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Where there are synergies between community agencies, health and social service agencies and the Washington Math Science Technology High School, we will pursue relationships. We will explore strategies of linking up via community hubs to provide services more effectively to students.

The school presently has cultivated and maintains partnerships with a number of corporations and organizations including a school-to-work partnership with the Greater Southeast Health Care System. Current partnerships include Catholic University, the Smithsonian Institute, United Asset Management, Metters Industries, MCI, National Cooperative Bank, Radio Shack, Target Drug Stores, National Institute for Health, Citibank, Reach for Tomorrow, ABF, Inc. and many others. These partnerships link students with organizations willing to take a personal interest in their success. Mentoring relationships, tutors, internships, and field visits are a few of the ways these relationships with community organizations enhance the learning environment.

c. School Organization and Culture: Describe how the school will be organized and how the organization and culture of the school will support student learning and promote responsible citizenship. In your discussion, you may wish to consider such topics as school leadership, classroom organization, course structure, student grouping, classroom climate, student advocacy programs (such as Mentoring), and the concept of the school as a "learning community."

The organization and culture of the school rests upon six basic pillars:

- All students can learn and attain high standards in core academic subjects. Students simply vary in the time they need to learn and the ways they learn best.
- Schools should help transmit a common culture that draws on the traditions and histories of our pluralistic society and the principles of liberal democratic government that unite us all. At the same time, other nations and peoples should also be understood by all children.
- Principals and teachers should have considerable freedom in organizing instruction and deploying resources to meet the needs of their students.
- Schools should have greater flexibility in deciding how best to accomplish their mission and, at the same time, should be held accountable through regular assessments of student progress.
- Advanced technology is a critical requisite to attaining high quality education in cost-effective ways.
- Schools should be places where students and staff choose to belong.

Students will be grouped according to the pace at which they master foundation and capstone units. A student may study mathematics with 11th graders while studying history or English with 10th graders. Students will receive more individualized instruction and will progress as they master the material presented in the foundation units, demonstrated by success in the assessments. We will rely heavily on mentors, tutors, teaching assistants and extra instructional time to help those who enter the The School get "up to speed" with the rigorous standards based academic program. Our longer school day and longer school year will provide additional time for study. Our school as a learning center will make these resources available to our students eighty hours per week. Our extensive use of technology for communication and management of instructional information will give us greater flexibility for identifying and responding to student educational needs.

d. Safety, Order, and Student Discipline: Describe the procedures you intend to put in place to ensure the school is a safe, orderly, and drug free environment where both teachers and learners can feel secure and where effective learning can take place. Describe the school's philosophy regarding student behavior, discipline, and participation in school activities. Describe the role of teachers, administrators, and other school staff in monitoring student behavior, advising and Mentoring students, maintaining communication with parents and families, and other activities associated with orderly schools. See §2202(10) and §2202(11), DC School Reform Act.

The school has and will continue to have an effective school culture of high expectations for everyone. Because of the rigorous academic program, a safe and challenging environment are key conditions of learning.

The 1997-1998 Student Handbook of the F.W. Ballou Math Science Technology Academy (see <u>Appendix</u>) has a <u>Code of Conduct</u> which is clear and concise:

"Fighting, profane language, rudeness to teachers and staff, as well as any kind of uncooperative behavior will not be tolerated and may serve as grounds for suspension and/or expulsion. Eating and drinking are not permitted in the classroom during class time. Hands off policy: students should not push, pull or place hands on another student during the school day."

#### **Detention Center**

The BMSTA After School Detention Center has been established as a means of handling minor disciplinary problems. The Center is operated from 3:20 pm to 4:20 pm daily.

Students attend the center from 3 to 10 days depending upon the severity of the disciplinary problems and the number of infractions a student has accrued. The purpose of the center is to assist students in recognizing inappropriate behaviors and to provide them with insight into correct ways to deal with problems. The center has a daily program of motivational and educational books, lectures, and audio/video tapes that each student must read, hear and see. Prior to completion of their period of time at the center, each student must write an essay on how he/she intends to correct the behavior that resulted in their referral. The center is staffed by teachers and administrators and is open to visits by parents.

All teachers at the school have and will continue to have voice mail to facilitate two way communication with parents to stem disciplinary problems early. Frequent communication between parents and teachers will be encouraged and facilitated.

e. Professional Development for Teachers, Administrators, and Other School Staff: Describe plans for providing access for teachers, administrators, and other school staff to the professional development activities they seek as they develop their confidence and expand the knowledge, skills, and other competencies needed for the new public charter school to serve its students well.

Teachers, administrators, and school staff will be supported with professional development activities throughout the transition from DCPS school to independent public charter school by the Modern Red Schoolhouse whole school design team and their consultants. Training in the use of technology, teaching to standards, new curriculum frameworks, writing standards based curriculum, and utilizing instructional information management software will be provided to facilitate the transformation process. Teachers will be provided with the skills and competencies essential to the effective implementation of the Modern Red Schoolhouse design.

f. Structure of the School Day and Year Describe the school calendar (including the number of days the school will be in session), the daily hours of operation, and the way the school day will be organized for instruction, independent study, and extra- or co-curricular activities.

To meet the needs of an inner city population and to provide sufficient time to accommodate the transition of students to a rigorous, standards-based academic program, Washington Math Science Technology High School will adopt a 206 day academic year and a 7 1/2 hour school day with wrap around learning, mentoring, tutoring, test preparation, and activities programing. The school will be a learning center open from 7 a.m. until 7 p.m. and resources will be available to students on an as-needed basis. We believe that a longer school day and year are required if we are going to have such high academic expectations of students. The school day will have great flexibility to allow periods of concentrated study in subject areas and field studies. We will make maximum use of the multitude of resources in the Nation's Capital including the laboratories of our corporate partners and the museums of the Smithsonian Institute.

#### **Evaluation Criteria:**

Reviewers will look for the quality of-

1. provisions being made by the school for families to be active participants in their children's education;

2. plans for developing working relationships and service links with

community organizations;

3. the organization and culture of the school and the degree to which these factors support student learning and promote responsible citizenship;

4. policies, practices and programs likely to make the school a safe

and orderly environment for learning; and

5. plans for the professional development of teachers, administrators, and other school staff.

#### B. Business Plan

## 1. Planning and Establishment

a. Profile of Founding Group: Describe the composition of the group or partnership that is working together to apply for a charter, including (1) brief resumes of the individuals, (2) the names and addresses of entities submitting the petition, and (3) the names and most recent annual reports of the organizations or corporations of which the individuals are directors or officers. See §2202(13), DC School Reform Act. Briefly explain how the efforts of this group of sponsors (or partners) have added to the quality of the plans for the proposed public charter school and how the group's continued participation will contribute to the long-term success of the school. Describe any plans for further recruitment of founders or organizers of the school.

Three Washington-based organizations have joined in a partnership, with the affirmative support of 100% the teachers and over two thirds of the parents to apply for the charter. The F.W. Ballou Math Science Technology Academy ("Ballou MST Academy"), the District of Columbia Potential National Merit Scholars Program ("DC Merit Scholars") and the AppleTree Institute for Education Innovation, Inc ("AppleTree") are working together to organize, develop and launch the Washington Math Science Technology High School.

The F.W. Ballou Math Science Technology Academy is a "school within a school"at the F.W. Ballou Senior High School. It was created by then-Superintendent Franklin Smith in 1994 as a DCPS in-district charter school. In the first year of operation, 90 students joined the academy. It has grown to 150 students and has demonstrated great potential in preparing students for study and work in math, science, and technology. As described in The Washington Post in the December 30, 1996 article, In Academic Oasis, a DC Student Blooms, "The two-year-old program, based at Ballou Senior High School in the far Southeast Washington neighborhood of Congress Heights, melds intensive academic study with a treasure chest of resources from private foundations, corporations and government agencies." The school was recently the subject of a feature story by WRC-TV's Jim Vance.

The Principal of Ballou MST Academy is Dr. Mary Johnson. Dr. Johnson is a distinguished education leader, with a track record of accomplishment in math, science and technology education. From 1990 through 1993, she directed the District-wide Mathematics, Science, and Technology Initiative from 1990 through 1993 and provided leadership in program development, supervision and evaluation of mathematics and science programs. Dr. Johnson attended the Mathematics Educators Institute at MIT and has served on national panels for mathematics standards, and as a consultant to the National Science Foundation. She has been invited to make numerous

presentations on mathematics instruction including "Diagnostic/Prescriptive Teaching of Mathematics: A Model That Works." at the Southern Education Foundation Conference in Charlotte North Carolina in 1990. This method is an integral tool in developing instructional strategies at the Ballou MST Academy. Dr. Johnson was selected by the Black Women in Sisterhood for Action (BISA) as one of twelve recipients of the Distinguished Black Women Award(1997). She was honored by the Moorehouse Committee of 100 for Outstanding Educational Leadership and Service (1997), and was selected as one of "Women Who Make A Difference" by Minorities and Women in Business Magazine January/February 1991 Volume 7, Number 1. She has been recognized many times for outstanding service, leadership and for achievement in mathematics instruction. Dr. Johnson received a B.S. from Virginia State College, a Master's in Education from Hampton Institute, and a Doctorate in Mathematics Education from the University of Maryland.

The Potential National Merit Scholars and National Achievement Scholars Program prepares young DC men and women to take their place alongside students from every part of the country as finalists for the most prestigious awards granted to graduating high school students. The program was organized by Dr. Eugene Williams appointed as Director of Test Improvement Program, Office of the Superintendent, DCPS after the District of Columbia failed to produce a single National Merit Scholar in 1989. In just two years, through a concerted effort organized and directed by Dr. Williams, Washington's number of scholars was competitive with other major cities. Delegate Eleanor Holmes Norton recognized Dr. Williams' accomplishment in the Congressional Record in 1992.

Dr. Williams continues to direct the program which has been expanded and operates independent of the DCPS. Over sixty potential scholars were recently prepared by the program which was conducted at Catholic University during the summer of 1997. Dr. Williams served as Assistant Principal at Dunbar Senior High School from 1983 until 1989, and as Supervisor of Instruction for DCPS in 1980. Dr. Williams has presented over a dozen papers at conferences and workshops and is a prolific author of newspaper, magazine and journal articles, books and manuals. He received his B.S. in English from St Paul's College, his Master's in English from the University of Virginia, and his Doctorate in Education Curriculum and Instruction from the University of Miami.

AppleTree Institute for Education Innovation is a Washington-based non-profit 501(c)(3) organization founded in 1996 with the mission to increase the supply of effective schools through innovation. Since passage of the District of Columbia School Reform Act last year, AppleTree has worked constructively with the DCPS leadership, civic, business, community, and philanthropic organizations to ensure that the law serve as an integral tool for improving public education. To make the case AppleTree has hosted several forums how charter schools can serve as effective models for implementing high academic standards, aligned curricula and assessments. We introduced the Modern Red Schoolhouse whole school design to the leadership of the DCPS including

Members of the Emergency Transitional Board of Trustees, CEO Julius Becton, Members of the School Board, and the Chief Academic Officer in the late Spring of this year. Recently, AppleTree hosted a presentation to the community by Dr. Yvonne Chan, a nationally-recognized California Principal who improved the academic and financial performance of her 1,000 student school by converting it into a charter school. The Founders of AppleTree have provided testimony before the DC City Council, the Emergency Transitional Board of Trustees, and the House Subcommittee on D.C. Appropriations regarding implementation of the DC School Reform Act. We have also testified before the Senate of Virginia's Education Committee on charter schools.

AppleTree was asked by school leaders to participate in a number of community forums across the city including parents, teachers, union leadership, and corporate partners to weigh the risks and benefits of public school autonomy. In conjunction with a number of business, association and community leaders via the Campaign to Rebuild Education in Washington, AppleTree has provided technical assistance and brokered resources to school leaders and founding groups seeking to convert existing schools or establish new public charter schools under the District of Columbia School Reform Act of 1995. It is a founder, steward, and supporting foundation for the Washington Math Science Technology High School.

As citizens, Jack McCarthy and Lex Towle (founders of AppleTree) helped lay the foundation for the Boston Renaissance Charter School which is the largest new charter school launched to date. As Treasurer and CFO of Boston Renaissance Charter School Inc., a non-profit 501 (c)(3) supporting foundation acting as an LEA, McCarthy led the efforts of the founding group to secure, finance, and renovate for adaptive reuse as a public school, a 200,000 s.f. 14 story building. The 250 Stuart Street property presently accommodates over 1000 children in grades K through 8.

As Treasurer, McCarthy managed the finances of the pre-opening phase of operations and oversaw the \$9,000,000 first phase of renovation from the awarding of bids to the certificate of occupancy. Towle served as Director of the Fund raising Campaign which attracted substantial levels of foundation, corporate and individual funding to meet the security requirements of the construction financing. \$12 million in construction financing was arranged and secured by another \$830,000 in private equity which was raised by the Campaign. The \$9,000,000 first stage of the renovation was completed in just 4 1/2 months, using union labor and bid out under the filed subcontract bid law.

To build a solid financial foundation for our efforts, AppleTree has attracted support from a number of leading foundations including the Morris and Gwendolyn Cafritz Foundation, the Clark Winchcole Foundation and The Washington Post Foundation. Individuals including leaders from the "I Have A Dream Foundation", the Federal City Council, as well as Washington area corporate and association executives have provided financial support for the Institute. AppleSeed has received a written commitment from the Washington

law firm of Patton Boggs, L.L.P. for pro bono legal services related to developing a charter school.

Jack McCarthy is a Founder of AppleTree Institute for Education Innovation. He is a Founder of the D.C. Public Charter School Coalition. He served as a Founder and Treasurer of the Boston Renaissance Charter School, Inc. and as Treasurer and Trustee of the Horace Mann Foundation. He received his B.S. from The American University in Washington, D.C.

Lex Towle is a Founder of AppleTree Institute for Education Innovation. He is a Founder of the D.C. Public Charter School Coalition. He served as Director of Development for the Boston Renaissance Charter School. He is Treasurer, Trustee and Chairman of the Finance Committee of Children's Montessori School in Ipswich, Massachusetts. He received his B.S. from Yale University in New Haven, Connecticut.

The founding organizations have participated, in a hands-on fashion, in all of the elements crucial to the organization and development of a successful charter school, and in the preparation of young minds for success in work and life. This combination of experience, enthusiasm, problem-solving, innovation and success is uniquely-positioned to expand a recognized, successful educational program in the District of Columbia to benefit a citywide population of over 400 high school students.

**b. Planning Process:** Describe the planning process that led to the decision to form a school and apply for a charter. In particular, describe how parents, teachers, and other members of the community have been involved in developing the school's mission, philosophy, focus, goals, and design and how they will continue to be involved in its implementation.

The F.W. Ballou Math Science Technology Academy was established as a DCPS charter school in 1994. The school was originally conceived and developed with significant input from the community as a solution to the problem of preparing students for careers and post secondary study in math, science, and technology. The school has succeeded in providing a rigorous academic program to a limited number of students as a school within a school at Ballou High School. The passage of the DC School Reform Act served as a catalyst for the Ballou MST Academy's community of teachers, parents and corporate partners to explore the feasibility of expanding the program and relocating it so that it could be available to a citywide population of students interested in math, science and technology. Since expansion of the program is not possible at the present location, the school would need to have the autonomy to relocate itself in facilities which met the academic program's needs.

Meetings with teachers, parents, and stake holders were held in the Spring of 1997 to weigh the risks and benefits of seeking autonomy in exchange for

greater accountability. A breakfast meeting was held on June 3rd with most of the 30 partners of the Academy to discuss how the school could better serve as a link between DCPS and the burgeoning community of technology corporations which ring the Nation's Capital. These corporate partners, including the Greater Southeast Health Care System, the Smithsonian Institution, Catholic University, the National Institute for Health, MCI, Reach for Tomorrow, Citibank, the Naval Medical Research Institute and others, concluded the breakfast in support of the application to become a charter school.

A number of planning meetings were held with the teaching staff to organize the work of preparation and to discuss problems and challenges of transition from a DCPS school to a public charter school. Discussions with parents led to a consensus that the needs of the Academy's students could be met more effectively with a greater measure of autonomy and flexibility available to the school if it converted to a public charter school. The process resulted in 100% support of the teaching staff and over two thirds support of the parents for the charter petition. In the section detailing the implementation of the charter, the organization of the teachers, parents, and staff into task forces is discussed as a mechanism for involving the stake holders in the organization and development of the charter school.

c. Corporate Structure and Nonprofit Status of the School: Describe the proposed corporate nature of the school. If the school already is incorporated, please submit a copy of the articles of incorporation and the bylaws. If the school is not already incorporated, please describe the process and time line under which this will occur. Also, if you have prepared drafts of proposed bylaws or articles of incorporation in anticipation of becoming incorporated, please submit them. See §2202(8), DC School Reform Act. A public charter school shall be organized under the District of Columbia Nonprofit Corporation Act (D.C. Code, sec. 29-501 et seq.). See §2204(c)(16), DC School Reform Act.

The F.W. Ballou Math Science Technology Academy is presently a DC Public School. A not for profit corporation, the Washington Math Science Technology School, Inc. is being formed as a qualifying entity under the laws of the District of Columbia, to receive the charter should the board favorably consider this application. Our time line calls for the incorporation to occur during the first two weeks of September.

Evaluation Criteria: Reviewers will look for evidence of-

- 1. a founding group and planning process that ensures that the interests of the community, parents, teachers, and other stake holders are and will be reflected in planning for the public charter school;
- 2. a process that brings together people possessing the professional skills needed for organizational, financial, pedagogical, legal, and other tasks required to operate a well-functioning school; and
- 3. a non-profit corporate structure that meets the requirements of the law.

## 2. Governance and Management

**a. Board of Trustees:** Describe the selection process and the terms of office of the proposed Board of Trustees. See 2202(9), DC School Reform Act. Describe the composition, roles, and responsibilities of the Board. If the Board of Trustees already has been selected, please submit the name, address, and resume of each member, as well as evidence of his or her commitment to serve. See §2205, DC School Reform Act. Describe how the Board will function in making executive decisions about the operation of the school. Describe the relationship of the Board of Trustees to school staff, parents, and students.

The Washington Math Science Technology High School has chosen a model of governance and management which is designed to manage the transition from the fast-pace of a start-up and conversion to the governance and stewardship of an independent public school.

Initially, there will be Members of the Washington Math Science Technology High School corporation who are selected by representatives of the three founding organizations and who will act as stewards of the vision, mission and philosophy of the school. They will serve as Members for a term of five years. After five years, Members of the corporation will be elected by a majority vote of the Board of Trustees for a five year term.

There will be a Board of Trustees, comprised of seven individuals and the Principal (who will sit with the Board as a non-voting member), which will control and govern the business affairs of the corporation. It shall have the right to exercise all powers of the corporation that are not expressly reserved to the members of the corporation by law, the Articles of Organization, or the bylaws.

Trustees will be recruited from the community based on their willingness to take a personal interest and make a personal commitment to the successful implementation of the vision of the founding group. Trustees will be selected in two ways and will have staggered terms of one, two, or three years. The corporation Members will **select** five qualified individuals for the Board of Trustees. Two will serve for three years. One will serve for two years. Two will serve for one year. The parents of students enrolled at Washington Math Science Technology High School will **elect** two Trustees for one year terms. The Board will hold the charter in trust for the citizens and will hold the administration of the school accountable for performance. After the initial group of Trustees has completed its term of service, succeeding Board Members will serve for three year terms except those elected by parents who will serve one year terms. As required by the District of Columbia School Reform Act of 1995, at least four Trustees will be residents of the District.

The Board of Trustees will set policy for the school and will delegate day to day administration of the school to the Principal, who will act as Head of School and who will be accountable to the Board. The Principal will serve as a non-voting member of the Board of Trustees. The Principal will have the authority to hire and fire all personnel. A Business Manager will assist the Principal by managing all business and non-academic affairs of the school. The Principal, or his/her designee will chair task forces of the school.

**b. Rules and Policies:** Please submit the rules and policies for governance and operation of the public charter school. If rules and policies are not yet in place, describe the process and timetable under which they will be developed. Also, please discuss your current views of the content that proposed rules and policies should include. See §2202(7), DC School Reform Act.

A set of by-laws of the Washington Math Science Technology High School, Inc. are attached (see <u>Appendix</u>).

**c.** Administrative Structure: Describe the administrative structure of the school. Describe the nature and extent of teacher, parent, and student input to decisions that affect the school.

The Principal of the Washington Math Science Technology High School will serve as Head of School. The Principal will be assisted in administration by a Business Manager and as Instructional Leader by an Administrative Team drawn from leaders among the teaching staff. The Principal, or his/her designee, will chair each of the task forces organized from time to time to manage the business of the school. Teachers, parents, staff, and corporate partners will serve as task force members. Washington Math Science Technology High School will invite teachers, administrators, and parents to participate in most areas of planning and implementation. The school will form seven transitional task forces to focus on the following areas:

- · standards and assessment
- curriculum
- technology
- organization and finance
- community involvement
- professional development
- facilities

These task forces will provide impetus and direction for change in the school as it transforms itself from a District of Columbia Public School into an independent public charter school. To ensure close communication across task forces, a steering committee will be formed, comprised in part of representatives from each task force.

## Evaluation Criteria: Reviewers will look for evidence of-

- 1. a stable, effective governance model that is capable of providing a strong vision and continuity of leadership;
- 2. a clear and convincing statement regarding the membership and the role of the proposed Board of Trustees;
- 3. a viable administrative structure capable of providing strong leadership for the school and making adequate provision for teacher, student, and parent input to decisions that affect the school: and
- 4. effective written policies, rules, and/or bylaws needed to ensure the viability of the governance and administrative structures, and plans for the development of such policies and rules.

## 3. Finance

**a. Anticipated Sources of Funds:** Discuss the level of funding you calculate will be generated by the per pupil allocation that you will be entitled to receive if you are awarded a charter. Indicate the amount and sources of additional funds, property, or other resources you expect will be available for the startup and operation of the proposed public charter school. Please indicate which of these represent firm commitments.

One of the assumptions planners for District of Columbia public charter schools must factor into budgeting is the complete absence of firm commitments of funds from any source. The per pupil capitation used as the core revenue figure is based on the District of Columbia Council Resolution which was enacted on July 3, 1996. The actual per pupil capitation for the The School may be more or less depending on congressional and council appropriations. For the purposes of the budgets contained herein, we assume a per pupil allocation of \$6,211 for all students attending this senior high school.

Since the Ballou Math Science Technology Academy is a going concern, we expect that the school will be eligible for some Title One funds, free and reduced school lunch, and federal competitive and categorical grants in the first year of operation as an independent public charter school.

From the founding group's entrepreneurial experience in launching a major new public charter school in 1995, we recognize that private philanthropic sources of corporate, foundation, and individual's capital will be required to augment the public funds which are provided. Understanding the long lead time inherent in this realm of funding, the founding group is actively soliciting indications of interest from major national foundations and corporations with a focus in mathematics and science education. Major gifts from the Morris and Gwendolyn Cafritz Foundation, the Clark-Winchcole Foundation, Mr. James Kimsey, and Mr. George Kettle to the AppleSeed Institute for Education Innovation have helped to underwrite organization and development costs of the preapplication phase of this project.

We are prepared to raise start-up funds and to undertake a \$7,000,000 capital campaign to renovate a property sufficient to house the Washington Math Science Technology High School. While this amount is daunting, it is less than the founders of the AppleSeed Institute for Education Innovation organized to renovate and secure a 200,000 s.f. property adapted for reuse as a public school in Boston in 1995. With the proper level of organization, execution, and leadership, we will raise the funding necessary to stabilize the The School from the uncertainties of the funding process.

## **Operating Budget**

#### Year One

Sources: Per pupil capitation:	\$1,242,200
Federal entitlement:	31,000
Federal grants:	190,000
Philanthropic Gifts:	200,000
Other Revenues	80,000
Total:	\$1,743,200

#### Year Two

Sources: Per pupil capitation:	\$2,484,400
Federal entitlement:	62,000
Federal grants:	240,000
Other Revenues	160,000
Total·	\$3.211.420

## Capital Budget

Sources: Construction Mortgage \$5,000,000

Capital Campaign \$2,000,000

Total: \$7,000,000

**b. Planned Fund raising Efforts:** Describe any planned fund raising efforts to generate capital or to supplement the per pupil allocations.

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As a Math Science Technology High School in the Nation's Capital, there is a tremendous opportunity for the school to have a transforming effect on the way other public schools prepare teachers and students in these disciplines. Donna, Ashaka, our communications teacher, is an experienced fund raiser and is prepared to organize and initiate an Annual Dinner as a major fundraising event. The School will seek opportunities for funding demonstration projects and educational projects which have leverage on public education in the District. Toward that end, we will seek project support, as well as operating support and capital support for the school until it reaches a point of financial stabilization five years from inception.

We plan to arrange for construction financing in the amount of \$7,000,000 to renovate and adapt the Franklin School for occupancy as the Washington Math Science Technology High School. We are undertaking a feasibility study for a capital campaign to retire the principal amount of \$7,000,000 in two stages. First, the school will seek pledges totaling \$2,000,000 to serve as equity and a sinking fund for prepayment of the mortgage debt. Second, the

school will organize a capital campaign committee to retire the debt within three years. While the debt is outstanding, a full-time development officer will be engaged to raise sufficient amount of operating support to service the debt payments so as not to place an undue burden on the operating budget of the The School. This requires a minimum of \$250,000 to be raised annually until the principal amount is raised in total.

**c. Financial Management:** Describe the financial management and internal accounting procedures of the school, including the fiscal controls you intend to put in place to ensure accountability. Describe your school cash flow management plan and how it will ensure availability of funds throughout the year.

With Board action, the school will establish a banking relationship with Franklin National Bank and will establish two accounts to segregate federal and state dollars from individual, foundation and corporate gifts. accounts will have dual signatories: the Head of School and the Business Manager. In the initial year of operation, the school will contract with a third party payroll services provider to pay salaries, make withholdings, and electronic reporting to the tax authorities. In the second year, the Business Manager will take over the payroll, if feasible and cost effective, and will manage the business affairs of the school on a modified version of Quick books. This system will provide the tools for periodic reporting and daily accounting functions such as vendor payments and daily cash receipts. The school will contract with a major accounting firm to perform monthly reconciliations, prepare financial statements, and communicate with agencies when necessary. The school will institute a system of internal controls which will provide checks and balances to safeguard the assets of the organization. The accounting records will be maintained using Generally Accepted Accounting Procedures (GAAP) for government, as provided by the Governmental Accounting Standards Board (GASB). A set of internal reports will be developed to monitor expenditures on administration, facilities, operations, instructional support, and instruction. External reports will be developed to report on school finances to the Public Charter School Board, the State Education Office, Foundations, and for the annual audit.

**d. Civil Liability and Insurance:** Indicate the types of insurance and the levels of coverage sought.

The school will provide health insurance to all employees as a benefit and will bid the coverage to obtain the most reasonable rate and cost. The school will engage an insurance broker to obtain appropriate coverage for workers compensation, directors' liability, general liability, and property insurance.

**e. Provision for Audit:** Describe the provisions that will be made for conducting annual audits of the financial, administrative, and programmatic operations of the school. See §2202(6)(A), DC School Reform Act.

The Board of Trustees of the Washington Math Science Technology High School will engage a major accounting firm to conduct an annual audit of the financial, administrative, and programmatic operations of the school.

## Evaluation Criteria: Reviewers will look for evidence of:

- 1. sound financial planning and management, including provision for needed cash flow and for audit; and
- 2. a realistic assessment of projected sources of revenue adequate for the fiscal viability of the school.

#### 4. Facilities

a. Identification of a Site: Where will the school be housed when it opens, and what will be the terms of the tenancy? What arrangements have and will be made to secure an occupancy permit? If you already have identified a permanent school site, describe the facility and indicate its location. If there are existing occupancy limitations for this site, please provide that information. If you have not identified a permanent site, describe your present options for a permanent school site, including your timetable for identifying and acquiring it. See \$2202(6)(B)(i)&(ii) and \$2209(a)&(b), DC School Reform Act. No applicant will receive final approval of its charter until the applicant has acquired title to or has otherwise secured the use of an acceptable facility.

The Washington Math Science Technology High School, upon receiving its charter, expects to relocate to temporary leased space at Catholic University of America until such time as a certificate of occupancy is issued on a permanent site. Catholic University, which is a partner of the Ballou Math Science Technology Academy, is an ideal temporary site for the charter school because all of the facilities required for a high school are available including physical activity, cafeteria, library, classrooms, technology, graduate assistants, mentors, tutors, and other resources. The Potential National Merit Scholarship program conducted its summer institute at Catholic University and enjoys a close relationship with the founding group.

The school will prepare a bid to obtain a fifteen year renewable, triple net lease on the Franklin School (see <u>Appendix</u>) which is a current surplus school property. Charter schools have a preference on current school properties under the District of Columbia School Reform Act of 1995. The Franklin School is centrally located at 925 13th Street, NW and is close to Metro Service and bus lines. This building has been targeted for a public private partnership by DCPS and is a National Historic Landmark. Such designation restricts the uses of the building for other than a school.

The building was constructed as the Civil War came to a close in 1864-65. It has a distinguished past. The children of Presidents Garfield, Johnson, and Arthur attended school here. It was the flagship building of a group of seven modern urban public school buildings constructed between 1862 and 1875 to house, for the first time, a comprehensive system of free universal public education in the capital of the Republic.

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**b. Site Renovation:** If you have identified a permanent building, explain how this site would be a suitable facility for the proposed school, including any plans to renovate.

The Franklin School is a suitable facility for the Washington Math Science Technology High School because it was intended to draw the attention and solicit the support of Congress, the nation, and the extended community to the public schools of the nation's capital. Over the years, most of the innovative educational programs of the District of Columbia Public Schools were developed and demonstrated at Franklin School.

Franklin School served as a laboratory in which the present public school program was first developed, including the concept of grading and curriculum, vocational education, high school, and professional training and standards for teachers. The school interacted prominently with the extended community, including the Smithsonian Institution and the new Corcoran School of Art, through public lectures, musical programs and exhibit of student art work.

The school won a medal for architectural design at the 1873 International Exhibition in Vienna for progress in education and architecture. The dual purpose of quality education and esthetics for the elevation of public taste and advanced knowledge was used as a model in both Europe and the United States. Its prominent location ensured that the Public Schools would have a visual presence equal to any branch of either the city or federal government.

#### **Today**

Washington Math Science Technology High School is an ambitious effort to provide a high quality public education through a new model of governance. Because the founding group seeks this charter to help transform public education in the District of Columbia, the prominent location would be appropriate.

There is, also, a link to the technology mission of the school. In December 1879, Alexander Graham Bell, with his assistant Charles Sumner Tainter, conducted experiments in his laboratory on the photo phone, an invention for the transmission of sound by light waves. This was the beginning of the fiber optics revolution.

The school offers over 45,000 s.f. of space and is designed as a school. It offers ample space for classrooms, laboratories, and meeting rooms. The Great Hall, on the top floor of the school, with a capacity of 500, served as a prominent community meeting room for many years. This site, with its ties to education innovation, technology, and community offers a superior location for the Washington Math Science Technology High School.

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**c. Financing Plans for Facilities:** Describe your financing plans for acquisition (purchase, lease, etc.) and renovation of a facility.

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We seek a renewable, fifteen year, triple net lease on the empty current school property from the DCPS when they are prepared to entertain such a transaction. We are seeking pledges of support from major national corporations, foundations, and individuals to finance the approximately \$7,000,000 in renovations which will be required to transform this 18th century schoolhouse into a 21st century school of math science and technology. With pledges of \$2,000,000 in place, we will secure a \$7,000,000 mortgage from Franklin National Bank (with any necessary guarantees) to finance the renovations. Upon completion, with the help of a committee of technology CEO's and local business leaders, we will undertake a three-year, \$5 million capital campaign to retire the debt from the renovations. While the mortgage is in place, we will engage a development officer to raise \$250,000 per year to service the debt and to cover the cost of fund raising.

**d. Building Maintenance:** Describe your plans for building maintenance, including how you intend to ensure that applicable codes and standards are continuously met.

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Members of the founding group were instrumental in securing, financing, and renovating a 200,000 s.f. building for adaptive reuse as a public charter school serving over 1,000 children in grades K through 8. We have a base of knowledge and experience in working through these issues which is unmatched. We will contract with a property management company to maintain the boilers, mechanical systems, elevators and air conditioning and to keep the building safe and clean. We will prepare requests for bids prior to receiving our certificate of occupancy to elicit the most competitive bid. Our general contractor and project manager will then meet with the property management company and develop a plan for maintenance of the facility and recommend a budget for establishing reserves. Through regular inspections and adherence to a professionally developed maintenance plan with proper amounts of reserves set aside, Washington Math Science Technology High School will enjoy its occupancy in the Franklin School in full compliance with all building codes and the Americans for Disability Act.



## THE CATHOLIC UNIVERSITY OF AMERICA

The Discovery Center for Cell and Molecular Biology Cardinal Station, McCort Ward Bldg. Washington, D.C. 20064

> Roland M. Nardone, Ph.D. Director 202-319-6161: 319-5275 FAX 202-319-4467

September 12, 1997

Dr. John Convey Provost Catholic University of America Rm. 207 O'B, Campus

Dear Dr. Convey:

Since its inception I have been supportive of the activities of the F.W. Ballou Mathematics, Science, and Technology Academy. This school within a school has provided excellent service to its students. Some students have received additional training at CUA via the Discovery Center and the Gene Search Projects (both funded by the NIH). Most recently, we assisted Ballou's summer program for Potential National Merit Scholarships by providing them with access to six-eight classrooms.

The Ballou Academy is now applying for status as a Public Charter School. I have written a letter of support for their change in status. (See enclosure)

The Academy, if it is granted charter status, may need temporary classroom space (for eight months for about 150 students) while a vacant DC school is remodeled. I encourage Catholic University to examine its temporarily surplus space and consider hosting the Academy during the transition period. It is my understanding that funds (perhaps from the Appletree Institute for Education Innovation) are available for some remodeling.

I will be glad to provide you with additional information about the benefits which may accrue to CUA through such an arrangement. I will also be glad to obtain additional information which may assist you in the decision making process.

Sincerely.

Roland M. Nardone, Ph.D., Director

The Discovery Center for Cell and Molecular Biology

Evaluation Criteria: Reviewers will look for the quality of the applicant's

- plans and progress toward:

  1. Attracting the resources necessary for acquisition and renovation of a school facility;

  2. Identifying and acquiring a site suitable for the proposed
  - educational program; and
    3. Complying with all building codes and obtaining an occupancy
  - permit.

## 5. Recruiting and Marketing

**a. Outreach to the Community:** Discuss how the school and its program will be publicized within the community the school plans to serve, and how the school can become a resource to the community.

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The school plans to serve a city wide population of students interested in math, science and technology. We will make our facility available to the community and will continue the well-documented outreach Ballou Math Science Technology Academy has practiced throughout its existence.

b. Recruitment of Students: Describe the outreach efforts that will be made to potential students and their families and the steps that will be taken to recruit students. Describe efforts to recruit students whose parents or guardians have not approached the school on their behalf. Describe how decisions will be made if more students apply than the negotiated enrollment level in your charter. See \$2206(c), DC School Reform Act. What effect will it have on the viability of your school if significantly fewer students apply than the negotiated enrollment level in your charter?

The school will reach out to the community as it always has, with the Principal traveling to middle schools throughout Wards 7 and 8 letting students and parents know about the rigorous academic program for inner city students interested in math, science, and technology. In year two, when the program doubles in size, a series of ten community meetings will be advertised and held throughout the city. One each will be held in Wards 1 through 6, with two each being held in Wards 7 & 8. A math and science learning center, now operated as Math at the Mall in Upper Marlboro, will be relocated to the The School. Through a diagnostics approach, students experiencing problems with mathematics will be provided with individualized instruction and new competencies on the spot. This learning center will be open to all DCPS students. We believe this learning center will be a powerful word of mouth source of enrollment for the The School, and will attract the students who can benefit most from a rigorous academic program.

We expect to have many more applications than we can accept. We will establish a waiting list and we will look for innovative ways to interact with DCPS students seeking instruction including PSAT prep, SAT prep, and Potential National Merit Scholarship preparation.

The founding group is experienced in marketing educational services to hard to reach communities and feels confident that the educational program will be oversubscribed. If, however, fewer students enrolled, the school would be forced to scale back personnel and costs to reach financial equilibrium. Given the present condition of public education and the growing technology job market in and around the District of Columbia, we expect full enrollment with a waiting list.

c. Future Expansion and Improvements: Please display your school's enrollment targets for each age level for the first five years of operation. If the targets reflect an increasing enrollment, describe your plans for expanding school facilities, attracting additional certified staff, and acquiring the other resources needed to serve a larger student body.

Estimated Enrollment targets of Ballou Math Science Technology Academy and the Washington Math Science Technology High School.

	1997-98	1998-99	1999-00	2000-01	2001-02
Freshman	40	100	105	105	105
Sophomore	38	37	105	105	105
Junior	37	36	105	105	105
Senior	35	35	105	105	105
Total	150	208	420	420	420

The school will relocate to a temporary location from the present site, when it receives its charter. The school's growth will mirror its access to a larger facility. Should the primary site for the school not be available, contingency plans are in place to identify another surplus school property or a private property which may be renovated for adaptive reuse. Through close, personal ties to the parents of the students through the IEC's and the family-school compacts, the The School will maintain a strong relationship with the families that we serve. Our corporate partners, and the vital role they play in the success of the school, provide a renewable resource to keep the school an exciting, stimulated learning center regardless of where it is located. We will manage the various transitions of this school from conversion to relocation and full expansion by forging strong bonds of trust with parents and the community earned through meeting high expectations and keeping our word.

Evaluation Criteria: Reviewers will look for the quality of the applicant's plans to:

- 1. Recruit sufficient students to operate the proposed school and satisfy its projected growth over time;
- 2. Attract a student body that reflects the diversity of the community, yet possesses interests, needs, and capacities that match the program emphasis of the school; and 3. Build strong, productive links between the school and the
- families and the community it serves.

## Washington Math Science Technology High School Charter School Opening Work Plan and Time Line 1997-1998

Aug 1997-Dec 1997 Sept 1997 Nov 1997 Dec 1997 Dec. 1997-Jan 1998 March 1998		
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September 1997

Develop by-laws

## Washington Math Science Technology High School Charter School Opening Work Plan and Time Line 1997-1998

Design and implement an integrated mathematics, science and technology curriculum for the Washington	
science and technology curriculant for the washington	
Math Science Technology High School for students.	March 1998 - September 1998
-Form a curriculum transition task force to develop	March 1976 - September 1976
integrated Foundation Units.	No. 1, 1000 L 1000
-Provide consultants to assist task force, provide planning	March 1998-June 1998
time for teachers to write the Foundation Units which	
will include assessments.	and the second s
-Provide time on professional training days for teachers	April 1998-June 1998
to work on the task force to complete the development	
of the Foundation Units	
-Pilot test Foundation Units	April 1998-June 1999
-Revise Foundation Units	June 1999 - August 1999
-Implement Individual Educational Compact	
-Form a standards and assessment transitional	March 1998
task force	
-Plan for the development of IEC for each student	March 1998-August 1998
and implement monthly meetings of the Standards and	
Assessment transitional task force.	
-Diagnose all students	September 1998
-Implement IEC and monitor progress of each student	October 1998-June 1999
-Implement Capstone Units	October 1998-June 1999
-Implement Watershed Assessment (to obtain baseline data	May 1999
-Professional Development on Modern Red Schoolho	
Standards	
-Contract the Modern Red Schoolhouse design team	
to provide professional development for all teachers on the Modern Red Schoolhouse Academic Standards.	
the Modern Red Schoolhouse Academic Standards.	

Provide a variety of modalities and facilities within and outside the school that will capture student interest and provide creativity.

-Contact and plan with directors and facilitators of special programs outside of the school for student participation.

- -Discovery Lab at Catholic University
- -Center for Excellence In Education
- -Explorer Program Boys Scouts of America
- -The Weinberg Group
- -School to Work Transition Program
- -Naval Research Lab
- -NIH (National Institute of Health)
- -NASA Space Camps

April 1998 - June 1998

## Washington Math Science Technology High School Charter School Opening Work Plan and Time Line 1997-1998

Technology			 	 
Establish baseline data by completing equipment/software	March 1998			5 = 10 · ·
inventory and teacher usage survey				
Identity funds to support a part-time, school-based	April 1998			
technology coordinator				
Develop technology implementation plan and specifications	April 1998			= -
using the Modern Red Schoolhouse technology plan.				
Implement technology plan:Acquire and Install				
LAN; pull cables for data, voice and video at same time	August 1998			
file server(s) and LAN operating software	August 1998			
computer for each teacher and administrator	August 1998			
instructional management system (IM Systems)	August 1998		2 11	
management information software	May 1998			
electronic-mail software	August 1998			
network modem(s) and supporting telephone line(s)	August 1998	- H. H. H.		
voice mail and telephones in each classroom	August 1998			
electronic mail software	August 1998			
a core set of instructional and management software	Andrea dillocation and the			
(e.g., electronic encyclopedia, graphing programs;				
integrated productivity tools)	August 1998			
Provide and arrange for basic training for all teachers				
administrators and staff in following areas:				
computer fundamentals	August 1998			
utilizing an integrated productivity software package	August 1998			
integrating third party software into the curriculum	August 1998			
basic multi media applications	August 1998			
utilizing school's e-mail. LAN, and voice mail	August 1998			
utilizing telecommunications in the classroom	September 1998			
electronically managing the core curriculum and assess-				
ment using the IM Systems.	September 1998			 

Adm	inistra	tion	Polic	cies

Student Orientation	August 1998	
Establishment of School Task Forces	November 1997-January 1998	
set timetables for development of foundation units	March 1998	
develop strategy to provide for continuous progress	April 1998	
inititiate process to instill virtues and workforce skills	May 1998	
identify professional development needs	May 1998	
Develop assessment procedures	May 1998	
Hire solicitor	June 1998	

#### Washington Math Science Technology High School Charter School Opening Work Plan and Time Line 1997-1998

Financial Management		
Open checking account	November 1997	
Identify check signers (2-3)	November 1997	
Identify check writer (1)	November 1997	
Signature policies	November 1997	
Appoint treasurer	November 1997	
Reports (Budget v. Actual)	December 1997	
Forms (P.O.'s, expense forms)	Deceember 1997	
Appoint CFO/Business Manager	April 1998	
Arrange insurance	June 1998	
Segregation of funds (Public v. Private)	April 1998	
Auditor/Preparer identified	April 1998	

Special Education Services		 - 111		
Identifying students with existing IEP's	June 1998			
Acquire records	August 1998			
Formteams	August 1998			
Develop alternative IEP's (Individual Educational Comp	oact August 1998			
Obtain parent approvals	August 1998			
Contact with SPED Administrator from DCPS	August 1998			
Define services requirements (for all SPED students)	August 1998			
Hire/contact with providers	June 1998			
ldentify resources (internal/external)	June 1998			

December 1997

April 1998

Schedule of Board finance reviews

Establish payroll

rood Services	
Identity free/reduced lunch students (Contact SEA)	June 1998
Identify legal requirements (free / reduced lunch)	June 1998
Define requirements	June 1998
Issue RFP for food services	June 1998
Select vendor	July 1998
Draft contract	July 1998
Execute contract	August 1998

Transportation	
Determine transporation needs of Anacostia students	April-June 1998
Define requirements (routes, times)	July 1998
Issue RFP for transportation	July 1998
Select vendor	August 1998
Draft contract	August 1998
Execute contract	August 1998

Health and Safety	
Acquire medical forms	June-July 1998
Send to parents	July 1998
Check for completeness	August 1998
Record keeping	August 1998
File	September 1998
Identify doctor/nurse/community health resources	July-August 1998
Staff first aid training	August-September 1998
Fire inspection	September 1998
Pre-inspection	August 1998
Drinking water test (Board of Health)	August 1998
Health & Safety Policy Handbook	August 1998
Fire Drill Policy/schedule/route	September 1998
Traffic management (drop off / pick up)	August 1998

#### C. Plan of Operation

#### 1. Student Policies and Procedures

**a. Timetable for Registering and Admitting:** Describe the timetable to be used for selecting and admitting students, including the timetable for a random selection process, if needed. See \$2206(c), DC School Reform Act.

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From the date of submission of this application for the school to convert from DCPS to an independent public charter school, parents of prospective students will be apprised that admissions may become subject to the District of Columbia School Reform Act of 1995, should a charter be awarded.

Upon receipt of a charter (which could occur between the months of November 1997 to April of 1998) formal recruitment of the next entering class of ninth graders will begin according to the lottery procedure described in the District of Columbia School Reform Act of 1995.

Applications will be accepted from January 1st through May 15th. The public lottery will be held on Monday May 25, 1998. Prior to the close of the application process, the Board will determine the number of available seats in the various grades of the school. Selections will be made from the pool of applicants in a public meeting for which ample notice will be given. After the available seats have been filled, a numbered waiting list will be established from those who were not selected by lottery. The waiting list will be maintained on an ongoing basis and students will be offered a seat in the WMSTHS as vacancies occur.

Students will be admitted in June of 1998 for the 1998-99 academic year. The admission process will include a personal interview with the Head of School and an explanation of the mission and expectations of parents, students, and teachers.

b. Policies and Procedures for Selection, Admission, Enrollment, Withdrawal, Suspension, and Expulsion of Students: Describe the policies and procedures that will guide the selection, admission, enrollment, and withdrawal of students. See \$2206(a),(b)&(d), DC School Reform Act. Describe the suspension, expulsion, and other disciplinary policies and procedures of the proposed school, and the criteria for making decisions on such matters. See \$2202(10) and \$2206(g), DC School Reform Act. Describe your policy on enrollment and tuition for nonresident students. See \$2206(e), DC School Reform Act.

As a public charter school, Washington Math Science Technology High School is open to all children in grades 9 through 12. The students who presently attend Ballou Math Science Technology Academy will remain enrolled at the school after it converts.

All students who apply will be advised of the rigorous academic program, the expectations of students, parents, and teachers, and the emphasis of the school in preparing students for higher study and employment in the fields of math, science and technology.

Policies and procedures for enrollment, withdrawal, suspension, expulsion, and other disciplinary policies and procedures of the proposed school, and the criteria for making decisions on such matters are included in the Student Handbook which is included in the <u>Appendix</u>.

The Board will establish a policy on the enrollment of non-resident students consistent with the intent of the D.C.School Reform Act of 1995. Our guide to such a policy would be to make seats available to residents of the District of Columbia first.

#### Evaluation Criteria: Reviewers will look for:

- 1. Timely, fair, and realistic procedures for registering and admitting students; and
- 2. Policies and procedures that are consistent with the mission of the school, comply with the public charter school legislation, and provide a fair framework for decisions about students.

#### 2. Human Resource Information

a. Key Leadership Roles: Please provide the names and qualifications of the persons who will hold the following or equivalent critical positions or roles in the public charter school--chief administrative officer (e.g., principal or headmaster); curriculum leader (e.g., curriculum coordinator or director, lead teacher, principal); business officer; and legal counsel, and the percentage of the person's time that will be assigned to these duties. If permanent selections for these roles have not yet been made, indicate the names and supply the resumes of the individuals who are providing leadership for these areas of responsibility during the planning period. Final charter approval will not be granted by the chartering authority until the applicant can demonstrate that these four roles are filled by highly qualified individuals. This requirement does not carry the assumption that all of these roles necessarily need to be full-time assignments.

The Head of School will be the present Principal of the Ballou Math Science Technology Academy, Dr. Mary Johnson. Dr. Johnson was the founder of the Academy and is a well-qualified instructional and administrative leader.

She will be assisted in her instructional and administrative responsibilities by an administrative team which will include two experienced lead teachers: Mr. Spencer Carey and Mr. William Edmeade.

The business manager will be selected after the charter has been awarded by the Head of School. Until a full-time business manager is in place, the responsibilities of the business manager will be managed by the AppleTree Institute for Education Innovation. Jack McCarthy, who is managing director of the Institute, has experience in this role having served as the Treasurer and CFO of Boston Renaissance Charter School, Inc. throughout the start-up and the opening of that school.

The legal counsel for the school is the law firm of Patton, Boggs LLP through the auspices of the AppleTree Institute, with whom the firm has an established pro bono relationship.

b. Qualifications of School Staff: Describe the standards that will be used in hiring teachers, administrators, and other school staff. Describe the professional and personal qualities that will be sought in teachers and other school staff and how those qualities will help the school implement its vision and achieve the goals you have set. See \$2202(12), DC School Reform Act. Describe the steps you will take to ensure that background checks are conducted on all school personnel, including volunteers.

The teachers hired by the school will be multidisciplinary. The existing faculty shares this background and several instructors are multilingual with fluency in French, Spanish, Persian, and German. The school will hire teachers who are certified and who have advanced degrees in their disciplines. Because of the sense of mission inherent in the charter school conversion process, the school possesses and will seek teachers who have passion for educating inner city children in the context of a rigorous academic program.

A Teacher's Handbook for the 1997-98 academic year is included in the <u>Appendix</u>. The school will follow the same procedures proscribed for police checks which it currently utilizes for all school personnel, including volunteers.

- **c. Staffing Plan:** Please provide information about the anticipated number of staff members, their positions, the pupil teacher ratio. How will staff be assigned, and how will they work together?
- d. Employment Policies: Describe your policies regarding salaries, contracts, hiring and dismissal, evaluation of staff, benefit plans, (including pensions), and other matters related to staffing. In addition, describe your policies on equal employment opportunities and maintenance of a drug-free workplace. See \$2202(18) and \$2207(a),(b)&(c), DC School Reform Act. If these policies are not yet in place, describe the process and timetable under which they will be developed. In addition, please discuss your current view of the content that proposed policies should include. Describe how your existing or proposed policies will assure that the rights and benefits of current employees of the District of Columbia Public Schools will be protected if they accept employment at your public charter school. See \$2202(18) and \$2207(a)&(b), DC School Reform Act.

The Ballou Math Science Technology Academy presently operates with employment policies regarding salaries, contracts, hiring and dismissal, evaluation of staff, benefit plans, (including pensions), and other matters related to staffing. In addition, the school implements DCPS policies on equal employment opportunities and maintenance of a drug-free workplace.

Teachers and staff employed by the school recognize that receiving a charter is an exchange of autonomy for accountability. All members of the faculty are cognizant that the policies under which the school presently operates will change if a charter is granted.

The founding group will evaluate all of the existing policies, should the charter be issued, during the first month of the conversion process. The management committee of the organization and finance task force will be delegated the responsibility of developing new policies for WMSTHS prior to the end of the academic year in June.

**e. Use of Volunteers:** If you plan to use volunteers, describe their possible roles. How will they be trained, and how will their work contribute to the ability of the school to achieve its goals?

Volunteers play a critical role in the organization, development, and operation of a public charter school. Volunteers will be asked to serve on the management committees with teachers, parents and staff.

Volunteers from the school's corporate partners presently are involved in a variety of roles which we would expect to expand. Some volunteers are involved with light office work such as making copies, filing, and answering telephones. A law firm provided attorneys who worked with our faculty to develop a conflict resolution process and then led workshops with teachers and students to familiarize them with it. Another attorney worked with our English teacher to teach students how to write persuasively. Students were given roles and a topic was chosen. Students had to research the topic from their assigned position and write and present their arguments. Other students judged the work based on their preparation for the role.

Technology corporate partners have sent volunteers to the school to repair and network computers. Volunteers are a valued part of our educational program.

Evaluation Criteria: Reviewers will look for evidence of:

1. High professional standards for teachers and other staff;

2. Working conditions and compensation packages that will attract high quality staff;

3. Planned staffing patterns that will contribute to achievement of the school's goals; and

4. Strong leadership capacity in key roles, including the roles of chief executive officer, curriculum leader, business officer, and legal counsel.

- 3. Arrangements for Meeting District and Federal Requirements Indicate how the public charter school will meet each of the following requirements, as well as any others that may apply. Indicate any special circumstances that may enhance or impede your ability to satisfy any of these requirements. If you propose to use any unusual approaches for meeting these requirements, please describe.
- a. Health and Safety See \$2202(11) and \$2204(c)(4), DC School Reform Act.

The school presently meets all health and safety code and will remain in compliance.

**b. Safety** (e.g., Compliance of facilities with Americans With Disabilities Act) and Fire Codes for Buildings See DC Code sec. 5-501 et seq.

The school presently meets all safety and fire code requirements. The renovation, preparation and maintenance of all school facilities will be in full compliance with safety and fire codes. All facilities work will be undertaken with appropriate levels of planning and inspections by the appropriate authorities.

**c. Transportation** See §2208, DC School Reform Act.

The WMSTHS has a significant enrollment in Southeast Washington and is committed to recruiting applicants who have an interest in math and science from schools which have served as feeder schools in the past including M.L. King Jr. Elementary School, Malcolm X Elementary School, Green Elementary School, Leckie Elementary School, Terrell Elementary School, Patricia Harris Education Center and Hart Middle School. To ensure that no student will decline admission to WMSTHS because of difficulty in securing transportation to and from school, WMSTHS will develop strategies and programs including vans, buses, and Metro subsidies which will be targeted at students in need. A comprehensive transportation policy will be developed upon receipt of the charter, establishment of the transition site, and identification of the geographic distribution of the enrolled students.

d. Average Daily Attendance (ADA)/Average Daily Membership (ADM) Count See \$2204(c)(12), DC School Reform Act. The Ballou Math Science Technology Academy maintains an average daily attendance count and average daily membership count.

e. Maintenance and Dissemination of Student Records: Describe your system for maintaining school records and disseminating information required by the District of Columbia School Reform Act, Parts B and D, and other applicable Laws, including D.C. Code sec. 31-401 et seq. (Compulsory School Attendance); D.C. Code sec. 31-501 et seq. (Immunization of School Students); D.C. Code sec. 31-601 et seq. (Tuition of Nonresidents); D.C. Code sec. 29-501 et seq. (Non-profit Corporations).

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The school has all student records on file in the office. We systematically update the transcripts with test data from PSAT's, SAT's, ACT's, and other test scores. At the end of each year our MIS office prints out the student records for the year and we put them on their transcripts. The records are kept up to date. When students transfer in we write to their schools and get their transcripts and maintain them. The school act as a registrar, The records are maintained at the school and are secure. Upon conversion, the school will utilize an automated record keeping program to make information more manageable and useful to instructional leaders.

#### f. Compulsory Attendance Laws

The school complies with the compulsory attendance law and will remain in full compliance with the law as a public charter school.

g. Subchapter B of the Individuals with Disabilities Education Act(20 U.S.C. 1411 et seq.) and Section 504 of the Rehabilitation Act of 1973 (29 U.S.C. 794).

The school is in compliance with both the Individuals with Disabilities Education Act(20 U.S.C. 1411 et seq.) and Section 504 of the Rehabilitation Act of 1973 (29 U.S.C. 794) and will follow the guidelines for compliance as a public charter school.

**h. Title I of the Improving America's Schools Act:** If you expect that your school will receive any Title I funds, describe how you will meet District and Federal requirements for the use of these funds.

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Ballou Math Science Technology Academy has not qualified as a Title One School. Should we qualify as a public charter school we will develop a plan for use of these funds to accomplish whole school change as provided for in recent legislation i. Compliance with Civil Rights Statutes and Regulations of the Federal Government and the District of Columbia See §2202(11) and 2204(c)(5), DC School Reform Act.

The Ballou Math Science Technology Academy is in compliance with Civil Rights Statutes and regulations of the Federal Government and the District of Columbia. In converting to an independent public charter school the same compliance plans will be continued without interruption..

**j. Other:** Describe how the public charter school will meet any other requirements that apply to your particular case but do not appear on this list.

The school will use the flexibility provided by the autonomy granted through the charter to develop innovative responses to any other requirements.

Evaluation Criteria: Reviewers will look for the quality of plans and evidence of positive steps toward compliance with applicable statutes, codes, and regulations.

#### 4. Implementation of the Charter

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a. Timetable and Tasks for Implementation of Charter: Provide a detailed timetable of the projected steps and dates leading to the opening of the public charter school once the charter is granted. See \$2202(6)(d), DC School Reform Act.

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Washington Math Science Technology High School will invite teachers, administrators, and parents to participate in most areas of planning and implementation. We will form seven transitional task forces to focus on the following areas:

- · standards and assessment
- curriculum
- technology
- organization and finance
- community involvement
- · professional development
- facilities

These task forces will provide impetus and direction for change in the school as it transforms itself from a District of Columbia Public School into an independent public charter school. To ensure close communication across task forces, a steering committee will be formed, comprised in part of representatives from each task force.

Each task force will make recommendations for change to the steering committee or the head of school. This process of review and recommendation will be established prior to the formation of the task forces.

The members of the task forces will be given three-year staggered terms to keep the membership stable. The school will rely on the support of the Modern Red Schoolhouse whole school design team to:

- train facilitators from each task force;
- conduct orientation sessions for each task force, clarifying options and priorities;
- provide prototypes of the basic elements of design that can be adopted to our school in the District of Columbia
- help solve implementation problems.

Our process will begin with parents, teachers, administrators, and other stake holders reviewing the strengths and weaknesses of the existing Ballou Math Science Technology Academy. Parents and corporate partners will be asked to join teachers and administrators in assessing their commitment to addressing any weaknesses which are identified.

Together, the school community, in collaboration with the Modern Red Schoolhouse design team, will identify those steps which need to be taken to allow all children to attain the high Modern Red Schoolhouse standards. Training and curriculum development needs of teachers and staff will be evaluated, as well as estimated costs. AppleTree Institute, Modern Red Schoolhouse, New American Schools Corporation, and corporate partners will work to support and steward the implementation plan.

#### Standards and Assessment

Responsibilities of School Task Force. The school task force for standards and assessment recommends a time line for implementation of standards, Individual Education Compacts, student reports, and school reports. Once these time lines are approved or endorsed, this task force works to secure their successful implementation. The time lines will include periods for piloting these elements, for review and evaluation of the pilot experience, for teacher training, and a date for achieving full implementation.

The schedule for implementing the standards is the most critical and complicated. It is critical because that schedule affects a vast array of activities. It is complicated because establishing benchmarks for student achievement during the years of transition must be both realistic and challenging.

The task force will also develop a strategy for providing collegial review of the assessment components in the foundation units. The task force will consult with the professional development task force to identify special training needs that should be addressed in the implementation of the assessment. A time line for the establishment of watershed assessments as a graduation requirement for students must be set. Students must know what requirements they must meet for graduation. Finally, the task force must develop a strategy for communicating the standards to parents, prospective students, and the community at large.

The task force will also develop a strategy for achieving school wide understanding of the focus on math, science, and technology and how those subject areas will be emphasized in the overall academic program.

#### Curriculum

Responsibilities of the School Task Force. The school curriculum task force has general responsibility for developing consensus around school-wide models of curriculum and instruction. The task force will recommend a

timetable for developing foundation units which prepare students to meet the Modern Red Schoolhouse standards.

The task force will develop a strategy that implements the curriculum across all subjects, but beginning only at the ninth grade. To ensure effective implementation, students must know what is expected of them when they enter the Washington Math Science Technology High School. Implementation will begin with the ninth grade cohort that enters the school understanding these new expectations. The strategy for change will be consistent with this need. The implementation schedule will be developed in consultation with the standards and assessment task force.

The second responsibility of the task force is to develop a strategy, in collaboration with the school leadership, that will allow the school to provide continuous progress for all students. This will need to be developed after a baseline assessment or diagnostic testing of the first ninth grade cohort, and every year thereafter with entering students.

The third responsibility of the curriculum task force will be to initiate and oversee a process of consensus-building regarding the core virtues and work force skills that the school will seek to instill in students. Virtues such as honesty, self-discipline, fairness, and courage will be encouraged among students. Corporate partners will be actively engaged in helping to set priorities for work force skills and will develop links to businesses where these skills may be further refined.

The curriculum task force will work with the Modern Red Schoolhouse team to identify training and development needs including project learning, learning centers, and interdisciplinary learning. The Modern Red Schoolhouse will also provide curriculum frameworks to guide in the development of the foundation units. A process of peer review of the units will be instituted.

#### Organization and Finance

Responsibilities of the School Task Force. Since the Ballou Math Science Technology Academy is a District of Columbia Public School seeking to make a transition to an autonomous and independent public charter school, there are two subcommittees which need to be created: the charter school and the management subcommittees.

The Charter School Subcommittee will focus on macro issues of organization and finance including the time line for autonomy, the capital budget, the per pupil allocation formula and other sources of funding, and aspects unique to the charter school law which have a bearing on organization and finance.

The Management Subcommittee will recommend strategies for using time flexibly and allowing for schedules that permit more individually-paced instruction. Establishing a schedule and assignment procedure for multi age

homerooms monitored by the advising teachers will also be a responsibility of this subcommittee. This subcommittee will identify needed changes in the school's instructional supply and materials inventories to accommodate more individualized learning.

The management subcommittee will propose a plan for implementing multi-year and multi-age homerooms and for advising teacher programs. The school leadership team will work with teachers to address class size, grouping of students, and the school calendar and schedule. The management subcommittee will identify and recommend functions which may be outsourced. The management subcommittee will propose a preliminary budget for subsequent years of operation.

#### Technology

Responsibilities of School Task Force. The school task force is responsible for the following activities:

- assessing the current status of equipment and software in the building and its use by teachers and staff;
- reviewing materials relevant to state-of-the-art equipment and software available for schools and becoming familiar with the best educational uses of these tools;
- developing a local implementation plan for the installation of new technology and for appropriate training and staff support; and
- monitoring the implementation of this technology and training, making adjustments as appropriate.

The technology task force will work with the Modern Red Schoolhouse, the Morrison Institute for Public Policy of Arizona State University, and IM Systems to develop an overall technology plan. The Morrison Institute will help the school personnel develop a technology implementation plan. The school will draw heavily on corporate partners for additional resources to effectuate implementation. Training for faculty and staff in fundamental computer operations, the use of productivity software, the development of multimedia curricula, and the integration of third party software into the curriculum. The IM Systems instructional management system will be implemented to provide the management information system to monitor the continuous progress via individualized instruction.

#### Professional Development

Responsibilities of the School Task Force. The school task force on professional development is responsible for developing the school-wide capacities needed to achieve the mission and goals. The task force will need to develop a professional development strategy for the school. Orientation and training will be provided initially by the Modern Red Schoolhouse design team. The task force will survey teachers and other committees to determine training needs for subsequent years.

During the planning phase, the task force will assess professional development needs to meet the school's mission of reinventing itself as an autonomous school with high standards, clear assessments, and a rigorous academic program. Members of other task forces will serve on this task force to enhance its work.

#### Community Involvement

Responsibilities of the School Task Force. The community involvement task force will develop strategies that increase parental involvement in student learning--both inside and outside the classroom. The task force will facilitate the establishment of parental education programs in the community and help build a network among social service organizations that can support the social and emotional needs of the students and their families. The task force will identify and recruit a cadre of community volunteers who will serve as mentors and instructional assistants in the school. The task force will also identify corporate partners and community leaders who will take a personal interest in the success of the school and its students and innovate to develop mutually-beneficial relationships. In subsequent years, the task force will develop community education programs to meet the needs of a broader range of citizens.

#### **Facilities**

Responsibilities of the School Task Force. The facilities task force will guide the efforts to acquire and lease, finance and renovate a building which will meet the educational needs of the Washington Math Science Technology High School. The task force will oversee the bidding and project management processes and will seek partnerships with community development corporations and corporate partners to meet capital needs in an innovative manner. The task force will develop strategies to innovate to provide 21st century technology in the physical plant of the school, and will be responsible for developing plans for maintenance, repairs, and improvements.

The timetable and tasks for implementation of charter are enclosed as an attachment.

**b. Major Contracts Planned:** Describe all major contracts planned, with a value equal to or exceeding \$10,000, for equipment, educational and other services, leases, improvements, purchases of real property, or insurance. Provide the name(s) of prospective contractors, if known. See \$2202(6)(c) and \$2204(c)(1), DC School Reform Act.

There will be major contracts awarded with a value equal to or exceeding \$10,000 related to site issues including architect, project manager, general contractor, and all of the major areas of renovation including plumbing, electrician, drywall, and painting, Financing will be secured for the renovations and it is possible that a contract will be undertaken with a bank or finance corporation which could have fees equal to or exceeding \$10,000. Furniture, fixtures, and equipment to furnish the school will be purchased or leased. Those contracts will surely have a value equal to or exceeding \$10,000. Most of the full-time staff will have contracts equal to or exceeding \$10,000. Special education services, if out-sourced, will have a value equal to or exceeding \$10,000. Accounting, audit, payroll, and book keeping services will be required and those contracts together could equal or exceed \$10,000. Food services for the school are planned and will exceed \$10,000. Business management will either be out-sourced or staffed by a full-time business manager and the value of that contract will exceed \$10,000. Transportation for the school is planned and the contract will exceed \$10,000. Books, curriculum materials, computers, software, and supplies are planned and will exceed \$10,000 in value. Whole school redesign services including implementation of standards, assessments, curriculum development, and integration of technology, will be procured from the Modern Red Schoolhouse Institute and their aligned vendors including IM Systems for the assessment module.

The School will seek qualified bids on all non-proprietary materials in order to receive the highest quality goods or services for the price paid. We will seek to participate in a purchasing consortium of independent schools which exists in the Baltimore-Washington area.

c. Orientation of Parents, Teachers, and Other Community Members: Describe how parents and teachers will be provided with orientation and other training to ensure their effective participation in the operation of the public charter school. See §2202(15), DC School Reform Act.

A key aspect of the founding group's vision is that a school must be a center of civic and community life. As such, the school's relationship with its parents and teachers is critical. The process of conversion from a DCPS school to an independent public charter school requires the support of two-thirds of the parents and teachers of the school. The first discussions of the benefits and risks of conversion were with the parents of the students and with the teachers of the Academy. By supporting the petition to convert, the teachers and parents recognize that their effective participation is critical to the success of the implementation of the educational program.

The process of conversion is more than just a transition to autonomy. It is a process of reinvention of the academic program by making it standards based. It is a process of self-improvement to manage the resources of the school more effectively.

There is an immense amount of orientation, participation, and training, inherent in the Modern Red Schoolhouse whole school design, which will be undertaken to ensure that every stake holder in the school community understands his or her role and responsibility in making the school a success. A series of informational meetings will be held with parents after the charter has been awarded to familiarize them with the planning and transition schedule, to help realize our vision of participation.

Because school attitudes and actions toward parent involvement are largely influenced by administrators and teachers, the principal will be prepared, supported and encouraged by the school leadership to promote family-school partnerships. To promote such a partnership, Washington Math Science Technology High School will develop a family-school compact for learning. The compact will seek to capture and sustain the effort for a successful partnership.

The Goals of the Family-School Compact are to:

- interest educators in promoting family involvement
- encourage and train educators to skillfully promote family involvement
- make educators and parents aware of the benefits of parent involvement
- facilitate communication between educators and parents through technology
- involve 75% of parents in one form or another of teacher-parent partnership
- increase student achievement because of greater parental involvement
- improve student attitudes because of greater parental involvement

To reach the goals of the family-school compact for learning, educators at Washington Math Science Technology High School will:

- seek out opportunities for professional development and training in parent involvement.
- make parents feel welcome in the school.
- provide a parent center for parents to use while at school.
- reach out to parents whose first language is not English.
- learn about the various ethnic, cultural and socioeconomic backgrounds of the students and know how to communicate with diverse families.
- accommodate parents' work schedules when creating parent involvement opportunities
- assign homework projects that engage each child's parents and family and make learning more meaningful for the student, such as family history, interviews with grandparents, or descriptions of parents' daily work.
- use technology, telephone calls, newsletters, conferences, meetings and Individual Education Compacts (IEC's) to keep parents informed of their children's performance and school activities.
- provide clear, practical information on home teaching techniques for parents of children who need extra help at home.

- provide opportunities for parents to visit the school, observe classes, and provide feedback.
- start the school year with an opening conference.
- invite and recruit parents to serve on school task forces and Board.

**d. Services Sought from the District of Columbia Public Schools:** List and describe the nature and extent of any services you intend to seek from the DC Public Schools. These might include such things as special education services, transportation, or food services.

A long-term, triple net ground lease, or a lease with an option to purchase of a surplus school building under the control of the District of Columbia Public Schools is the only service we would seek from DCPS.

#### Evaluation Criteria: Reviewers will look for:

- 1. Soundness of implementation plans, including the pace and timing of activities associated with the growth of the school to its full capacity;
- 2. Appropriateness of planned major contracts; and
- 3. Quality of plans for orientation of parents, community members, and school staff to the vision and program of the public charter school.

#### D. Public Charter School Accountability Plan

Provide as complete responses as possible to the following requests for information about the elements of your school's accountability plan. Where information is not yet available, please describe the process and the time line under which the elements of the accountability plan will be fully completed.

#### 1. Goals Against Which the School's Success Will be Judged

Provide an overview discussion of how the goals you have set for the school will be used as a basis for measuring performance and progress.

The founding group of the Washington Math Science Technology High School believe that charter schools offer educators freedom to reach for higher goals than they might otherwise achieve without autonomy. Therefore, our goals are high, as are our expectations. For a charter school process to be successful, we believe that the charter school must not be an island unto itself, rather it must seek a transforming effect upon the district in which it is located. Our goals seek to deliver a high quality education to the students who attend The School while having a positive effect on education through friendly competition with the other public schools in the District of Columbia.

The goals against which the school's success will be judged consist of the following:

- 1. Demand for a seat at the Washington Math Science Technology H.S.
- 2. Student academic performance measured against DCPS performance.
- 3. Student academic performance measured against US performance.
- 4. Student preparedness for work and life.
- 5. The school as a center for civic and community life.
- 6. Washington Math Science Technology High School as a change agent for public education in the District of Columbia.

#### 2. Standards for Performance

List the measurable performance objectives for students and for the school that have been defined based on these goals. Define what you believe will represent substantial progress toward these objectives.

Demand for a seat at the Washington Math Science Technology H.S.

- Numbers of applications
- Size of the waiting list
- Attendance rates
- Drop out rates
- Graduation rates
- · Teacher turnover rates

Student academic performance measured against DCPS performance

- Individual Education Compact Parental Participation Rate
- · Performance on standardized tests
- SAT Scores
- Number of National Merit Scholars
- · Number of National Achievement Scholars
- College placements

Student preparedness for work and life

- · Ratio of mentors to students
- Graduation rates from 4 year schools
- · Ranks achieved in armed forces
- Honorable discharges from armed forces
- College completion rates
- Employment rates
- Number of school to work placements in area businesses
- Socioeconomic status of graduates five years after last year of formal education

The school as a center for civic and community life

- · Hours per week and days per year school is open to the community
- Number of adult education participants
- Number of meaningful corporate partnerships
- Number of summer internships
- Parent participation on task forces
- · Community participation on task forces
- Use rate of the school for community meetings
- · Parent and community surveys

Washington Math Science Technology High School as a change agent for public education in the District of Columbia.

- number of DCPS teachers receiving professional development at Washington MSTCHS
- number of schools establishing feeder school relationships with Washington MSTCHS
- number of teachers and principals who leave to start charter schools of their own.
- number of DCPS schools which adopt program characteristics of Washington MSTCHS including extended school day, academic year, and the Modern Red Schoolhouse whole school design.
- number of school partnerships and collaborations Washington MSTCHS forms with DCPS schools.
- number of DCPS National Merit Scholars and National Achievement Scholars prepared at the Washington MST Summer Institute.

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#### 3. Baseline Performance

Describe how a baseline for measuring performance and progress will be established, including how district wide assessments can be used for this purpose.

The data will be collected and measured. Permanent records will be established for graduates of the Washington MST High School to track post graduate data for the accountability matrix over the course of the fifteen year charter.

District wide assessments are not truly meaningful with regard to the Washington Math Science Technology High School because academic performance throughout the DCPS is so poor. We would use the DCPS district wide assessments as comparables and we would look to improve dramatically upon them. One key reason why the comparables are difficult measures against which to compare is the dramatic drop out/transfer rate of sophomores and juniors at DC Public Schools which approached 25% per year. Without exaggeration, one can say there is no place to go but up. The current performance of the Ballou MST students is at or above the norm.

#### 4. Measurement

Describe how you will measure progress toward the performance objectives you have defined. What assessment tools and measures will be used? What comparisons will be made and what other analysis will be done? How will results be displayed? Identify the person responsible for conducting the evaluation and describe his or her professional qualifications.

Enclosed is a chart of proposed success indicators for the Washington Math Science Technology High School with measurable goals and dates for measures to be taken from data gathered at the school, standardized test scores, surveys and from graduate histories.

~ ~ ~

AppleTree Institute for Education Innovation will be responsible for conducting the evaluation in conjunction with the Modern Red Schoolhouse design team and the leadership of the school. Our qualifications for conducting this evaluation come from our credentials in having laid the foundation for the largest new charter school in the United States and from our study in the field of schools and school reform over the past five years. We have established success indicators which are clear and quantifiable and which will yield considerable data on the success of the school in making a difference in the public education of students in the District of Columbia.

## 5. Reporting Performance and Progress to Parents, the Community, and the Chartering Authority

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Describe the process and timetable through which performance and progress will be reported. See \$2204(c)(11), DC School Reform Act.

. ~ .

These measures and the performance against these measures will be presented to the public in the Annual Report of the Washington Math Science Technology High School and will be presented to the Board of Trustees.

#### **Evaluation Criteria:**

Reviewers will look for:

- 1. Demonstrated responsiveness to community, parents, and students;
- 2. Alignment between the school's proposed measures of success and the goals it has established for itself;
- 3. An accountability plan with a reasonable, thorough, and conceptually sound design for measuring and reporting the performance and progress of the public charter school; and
- 4. A realistic time line for implementation.

#### Washington Math Science Technology High School Success Indicators and Accountability Measures

1	A	С	D	Ε
1	Success Indicator	Goal	1998 Measure	1998 Measure
2	Odeteco Mariano.			T Vaccount of Section 5
	Demand for a seat at the Washington Math Science Technology H.S.			
	Numbers of applications	400		
	Size of the waiting list	300		
	Attendance rates	95%		
7	Drop out rates	5%		
	graduation rates	95%		
9	Teacher turnover rates	15%		
10				
11	Student academic performance measured against DCPS performance			
12	Individual Education Compact Parental Participation Rate	95%		
	performance on standardized tests	>DCPS		
	SAT Scores	>DCPS		
	Number of National Merit Scholars	2 per annu	n	
	Number of National Achievement Scholars	2perannu		
	college placements	75%		
18			America (Maria del 2000), del Espera accardo carra	
	Student preparedness for work and life			
	Ratio of mentors to students	1		
	graduation rates from 4 year schools	0.95		1
	ranks achieved in armed forces	100% lead	dership	
	honorable discharges from armed forces	100%		
	college completion rates	90%		
-	employment rates	95%		
	number of school to work placements in area businesses	25%		
27	socio economic status of graduates five years after last year of formal ed.	>DC mean	n	**************************************
28				
	The school as a center for civic and community life		***************************************	
	hours per week and days per year school is open to the community	80		
	number of adult education participants	100		
	number of meaningful corporate partnerships	35		
	number of summer internships	100		
	parent participation on task forces	25		
35	community participation on task forces	25		
	use rate of the school for community meetings	2 nights p	er week	
	parent and community surveys	+		
38				
	Washington Math Science Technology High School as a change agent			
40				
	number of DCPS teachers receiving professional development at	100		
42	Washington MSTHS			
43		10		
44	Washington MSTHS			
45		5		
	number of DCPS schools which adopt program characteristics of		**************************************	
47	+			
48		10		
f	number of school partnerships and collaborations Washington MSTHS	10	·····	
50			**************************************	
51	number of DCPS National Merit Scholars and National Achievement	10		
52				
53		1		

# Assurances Form (This form must be submitted with the application.)

As the duly authorized representative of the applicant, I certify that the proposed public charter school:

Washington Mathematics Science Technology High School

- 1. Will seek, obtain, and maintain accreditation for the public charter school from at least one of the accrediting bodies listed in Part B of the District of Columbia School Reform Act. See §2203(h), DC School Reform Act.
- 2. Will, if the school's educational program includes preschool or prekindergarten, be licensed as a child development center by the District of Columbia government not later than the first date on which such program commences. See §2203(h)(2), DC School Reform Act.
- 3. Will not charge tuition, fees, or other mandatory payments for attendance at the public charter school or for participation in its programs, except to non-resident students or for field trips or similar activities. See §2204(c)(2), DC School Reform Act.
- 4. Will provide the District of Columbia Public Schools Emergency Board of Trustees with student enrollment data needed to fulfill its responsibilities. See § 2204(c)(12), DC School Reform Act.
- 5. Will establish an informal complaint resolution process not later than two months prior to the first date on which instruction commences. See §2204(c)(13), DC School Reform Act.
- 6. Will be nonsectarian and will not be affiliated with a sectarian school or religious institution. See §2204(c)(15), DC School Reform Act.
- 7. Will hold non-profit status under terms stated in the District of Columbia Non-profit Corporation Act prior to receiving a charter. See §2204(c)(16), DC School Reform Act.
- 8. Will offer open enrollment to all students who are residents of the District of Columbia, and will use a random selection process when the school receives more applications from students of the District of Columbia than there are spaces available. See §2206(a), (b), (c), & (d), DC School Reform Act.
- 9. Will give the District of Columbia Public Charter School Board and the District of Columbia Public Schools Emergency Board of Trustees access to and the right to examine all records or documents related to the award, as well as any documents and records, including audit findings, needed to determine the performance of the school under the terms of its charter.

SIGNATURE OF AUTHORIZED CERTIFYING OFFICIAL	TITLE
Mary Id. Dohnson	Director
APPLICANT ORGANIZATION  F.W. Ballou Mathematics Science Technology Academy  District of Columbia Public Schools	DATE SUBMITTED September 11, 1997



#### Frank W. Ballou

Mathematics Science Technology Academy 3401 4th Street, S.E. Washington, D.C. 20032

(202) 645-3365 (202) 645-3365 FAX (Call First)

September 15, 1997

The Founders of the Washington Math Science Technology High School will submit its Conversion Endorsement Forms on or before the revised deadline of October 2, 1997, as directed by Josephine Baker, Chairman.

### **Conversion Endorsement Form**

#### **Signatures**

I, the undersigned, affirm the	at the signature placed on this for	m indicates my sincere desire, free
	F.W. Ballou Mathematics Science	
Public School Within from	School Charter (name of school) school into a public ch	
(public, private, or indepe	ndent)	
This sheet contains the signs	itures of: D parents D adult stu	idents  teachers
Name	Address	Signature
1. CARLA H. LIBANATI	2800 ERIEST. #AI SE WASH	20020 dilanati
2 William F. Edmead	4926 Central Avenue, NE. 20	an) C. Whan P. Edmen
3. Donna Ashaka	290/ Memory Lane, Silve	K Spring MD 20004 Donlar St. B.
4. Mehran Dixanbaigyz	and 1711 35th St. Ny # 25 1	V DC. 20007 Chl & Simul
5. Spencer V Carey	13109 Rhame Dr FTWAND	19th John Ce
6. Solin Hegilon	5413 MACARTHUR BLU'D., D.W	., WASH., D.C., 20016 ROBIN MEGIBOW
7. Cor E Reels	1354 Juniper St. N.W.	Rev. Carl & Bula Ding
8. BEATRICE MERCHANT	1425 4 th St. 5. W. A60	1 Beating B. marker
9. <u>Adrienne White</u>	P.O.Box 10182 Alex, Va.	Adrieme White
10.		
11		
12.		
13,		
4.		
5		

#### Washington Math Science Technology High School Public Charter School Two-Year Operating Budget

DESCRIPTION	Year One: FY	Year Two: FY
REVENUES		
Per Pupil Charter Payments	1,242,200	2,608,620
Federal Entitlements	31,000	62,000
Federal Competitive & Categorical Grants	190,000	252,000
Philanthropic Support	200,000	2,000,000
Loans	320,000	5,500,000
Other Revenues	80,000	160,000
TOTAL REVENUES	2,063,200	10,582,620
EXPENSES		
Personnel Salaries and Benefits		
Principal/Executive	70,000	70,000
Teachers	496,000	892,800
Teacher Aides/Assistants	50,000	66,500
Other Education Professionals	150,000	199,500
Clerical	45,000	45,000
Custodian	0	65,000
Business Manager	48,000	48,000
Employee Benefits	257,700	416,040
Staff Development	50,000	100,000
Subtotal: Personnel	1,166,700	1,902,840
Direct Student Costs		
Textbooks	11,704	23,408
Supplies and Materials	13,300	26,600
Library and Media Center Materials	8,645	100,000
Computers and Materials	25,000	160,000
Other Instructional Equipment	14,000	65,000
Classroom Furnishings	15,000	30,000
Student Assessment Materials	25,000	50,000
Contracted Instructional/Student Services	10,000	75,000
Other	5,000	6,650
Subtotal: Direct Student Costs	127,649	536,658

#### Notes:

- 1. We assume per pupil reimbursement of 6211 for all students.
- 2. We assume 200 students in Year One and 420 students in Year Two
- 3. We assume renting temporary space at Catholic University in Year One and occupying Franklin School in Year Two.
- 4. Whole school redesign costs will be spread over first two years
- 5. We assume a \$5,000,000 mortgage augmented by a \$2,000,000 capital campaign to finance the renovation

#### Washington Math Science Technology High School Public Charter School Two-Year Operating Budget

DESCRIPTION		Year One: FY	Year Two: FY	
Оссирапсу				
Rent		100,000	1	
Mortgage		0	187,500	
Maintenance and Repairs		5,000	24,000	
Renovation (Including Reserve	3)	10,000	6,750,000	
Utilities		10,000	60,768	
Janitorial Supplies		750	3,500	
Equipment Rental and Mainten	ance	500	13,000	
Contracted Services		7,500	24,000	
Subto	otal: Occupancy	133,750	7.062,769	
Office Expenses				
Supplies and Materials	•	3,500	4,655	
Furnishings		3,000	5,000	
Equipment Rental and Mainten	ance	10,000	13,300	
Telephone/Telecommunication	s	12,000	60,000	
Accounting and Payroli		6,500	20,000	
Printing and Copying		3,200	6,250	
Postage and Shipping		3,200	4,256	
Other		1,500	1,995	
Subt	otal: Office	42,900	115,456	
General Expenses				
Insurance		12,000	60,000	
Debt Service		320,000	500,000	
Transportation		45,320	60,275.6	
Food Service		92,700	190,000	
Administration Fee		8,000	14,871	
Other		10,000	13,300	
	Subtotal: General	488,020	838,446.6	
TOI	AL EXPENSES	1,959,019	10,456,170	
EXCESS (OR DEFICIENCY)		104,181	126,450.4	

Washington Math Science Technology High School 12 Month Cash Flow Budget

DESCRIPTION	July	August	September	October	November	December	January	February	March	April	May	June	TOTAL
REVENUES											4		
Per Pupil Charter Payments	C	С	0	621,100	0	C	0	0	621.100	0	0	0	1.242.200
Federal Entillements	0	0	0	0	0	0	0	0	0	31,000	0	0	31,000
Grants and Donalions	200,000	0	0	0	0	0	0	63,333	63.333	63,333	0	0	390,000
Loans	0	160,000	0	0	0	0	160,000	0	c	0	0	0	320,000
Other Revenues	0	0	8,000	8,000	8,000	8,000	8,000	8,000	8,000	8,000	8,000	8,000	80,000
TOTAL REVENUES	200,000	160,000	8.000	620,100	8,000	8,000	168,000	71,939	602,433	102,333	8,000	8,000	2,069,200
EXPENSES  Dersonnel Salaries and Renefit	47 225	97 225	97 225	97 225	97 225	97.225	97 225	97.225	97.225	97.225	97.225	97.225	1.166.700
Direct Student Costs	0	0	12,765	12,765	12.765	12,765	12,765	12,765	12.765	12,765	12,765	12,765	127.649
Occupancy	10,000	0	0	41,250	0	0	0	41,250	0	0	Ö	41,250	133,750
Office Expenses	3,575	3,575	3,575	3.575	3,575	3,575	3,575	3.575	3.575	3.575	3,575	3.575	42.900
General Expenses	14,002	14.002	14,002	174,002	14,002	14,002	14,002	14.002	174.002	14,002	14.002	14,002	488.020
TOTAL EXPENSES	124,802	114,803	127.567	328,617	127,567	127,567	127,567	166,817	287,567	127,567	127.567	168,817	1,050,010
EXCESS OR (DEFICIT)	76,198	120,307	830	901,114	181,547	91,980	102,414	4,931	400,707	384,564	264,006	104,181	104.181
							1						
												The second second second	And the second second second

# Washington Math Science Technology High School Public Charter School Five-Year Estimated Budget

REVENUES Per Pupil Charter Payments Federal Entitlements Grants and Donations Loans Other Revenues TOTAL REVENUES	YEAR 1				
		YEAR 2	YEAR 3	YEAR 4	YEAR 5
Federal Entitlements Grants and Donations Loans Other Revenues TOTAL REVENUES	1 040 000	0 808 60	000000	0 808	0 698 690
Grants and Donations Loans Other Revenues TOTAL REVENUES			62,000	62,000	62,000
Loans Other Revenues TOTAL REVENUES	390,000	2,2	300,000	300,000	5,000,000
Other Revenues TOTAL REVENUES	320,000	5,000,000	200,000	200,000	200,000
TOTAL REVENUES	80,000	160,000	175,000	200,000	225,000
	2,063,200	10,082,620	3,345,620	3,370,620	8,095,620
EXPENSES					
Personnel Salaries and Benefit	Benefite 1,166,700	1,902,840	1,902,840	1,902,840	1,902,840
Direct Student Costs	127,649	536,658	310,000	316,200	322,524
Occupancy	133,750	7,062,769	406,000	414,120	5,172,402
Office Expenses	42,900	115,456	120,000	122,400	124,848
General Expenses	488,020	338,446	549,000	555,980	563,100
TOTAL EXPENSES	1,959,019	9,956,169	3,287,840	3,311,540	8,085,714
EXCESS (OR DEFICIENCY)	104,181	126,451	57,780	59,080	906'6

1. The per pupil allotment is based on \$6,211 for all grades in the senior high school.

The grants and donations figure is based on the federal charter school start-up grant and anticipated philanthropy

We expect to arrange a working capital line of credit with a local bank and the revolving fund pledged against the per pupil payments from ъ.

A capital campaign and mortgage totaling 7,000,000 will finance renovation of Franklin

The Diagnostic and Math Learning Center will produce other revenues including evening fee for service training for students who attend oth 4 .6 .6

The Capital Campaign will raise \$5,000,000 by Year Five to eliminate debt from renovations.

# Appendix F

# Accountability Plan Performance Analysis School: <u>WMST Public Charter School</u>

#### ORGANIZATIONAL PERFORMANCE STANDARDS: FISCAL MANAGEMENT – ACCOUNTING POLICIES

1. Accounting Policies				
Above Average 5	Satisfactory 4	Watch – Improvements Required 3	Substandard – Probation 2	Poor – Revocation 1
School follows PCSB accounting guidelines. Guidelines include 1) using approved auditors as required; 2) following audit policies; 3) maintaining records under accrual basis of accounting; 4) and reporting financial	With minor exceptions, school follows PCSB accounting guidelines.	The school has failed to follow PCSB accounting guidelines for one audit cycle. School has implemented a corrective plan.	The school has failed to follow PCSB accounting guidelines for more than one audit cycle and/or the school has committed a significant breach in one cycle. A corrective plan is in development.	The school has failed to follow all PCSB accounting guidelines for more than one audit cycle. A corrective plan was not developed or was never followed.
statements according to GAAP.				

**Comments:** Based on its interim financial reports and annual financial audits, WMST has adhered to GAAP. Key results of the FY07 financial audit are...

- Financial statements conform to accounting principles generally accepted in the United States of America.
- No matters involving the internal control over financial reporting that are considered to be weaknesses.
- No instances of noncompliance which are required to be reported under Government Auditing Standards.

Overall, WMST has been efficient in administering accounting policies which follow PCSB accounting guidelines.

GRADE FOR ACCOUNTING POLICIES: 5.00

# Accountability Plan Performance Analysis School: WMST Public Charter School

#### ORGANIZATIONAL PERFORMANCE STANDARDS: FISCAL MANAGEMENT – FINANCIAL REPORTING

2. Financial Reporting a. Audited Statements				
Above Average 5	Satisfactory 4	Watch – Improvements Required 3	Substandard – Probation 2	Poor – Revocation
Audits are submitted on a timely basis. Annual audit receives an unqualified opinion with no findings. Management displays a high level of transparency and an interest in continuous improvement of financial management.	Audits are submitted on a timely basis. Annual audit receives an unqualified opinion with no findings.  Management letter reflects minimal need for changes in financial management. Any changes are implemented immediately.	Audits are submitted on time or with slight delay due to specific circumstances. Audit findings show need for significant improvement; school implements changes immediately. Procedures are tracked to ensure compliance with auditor's recommendations.	At least one audit has been significantly delayed. Annual audit receives a qualified opinion. Audit report or management letter indicates significant financial problems; changes not implemented from prior year's findings. School develops realistic plan based on auditor's recommendations to be	Audits have been significantly delayed for more than one cycle and/or not submitted at all. Annual audit receives a qualified opinion for two years or more. Audit report or management letter indicates significant financial problems for which turnaround is not feasible; changes not implemented from prior year's management letter.
			implemented over the next year.	management tetter.

**Comments:** WMST has submitted its annual audits to the PCSB in a timely fashion. Each of the school's audits received an unqualified opinion. The following audit findings were disclosed in the FY2007 audit:

- Year-end account balances were not properly reviewed or analyzed resulting in an excessive amount of journal entries
- Two vendors were paid in excess of \$25K in total for services provided to the school
- The school did not utilize its accounting system to properly track grant expenditures
- Lack of segregation of duties
- File management and document retention processes were lax.

GRADE FOR FINANCIAL REPORTING (Audited Statements): 3.50

# Accountability Plan Performance Analysis School: WMST Public Charter School

#### ORGANIZATIONAL PERFORMANCE STANDARDS: FISCAL MANAGEMENT - FINANCIAL REPORTING

2. Financial Reporting b. Budgets and Interim Financials				
Above Average 5	Satisfactory 4	Watch – Improvements Required 3	Substandard – Probation 2	Poor – Revocation
Budgets and interim financials are submitted on time and follow the PCSB template. No significant problems identified in reports.	Budgets and interim financials are submitted on time and follow the PCSB template with few exceptions. Only minor spending variances or other problems are reported.	Budgets and interim financials are submitted late and/or do not follow the PCSB template. Significant variances or other problems are reported, but they have reasonable justifications and do not necessarily jeopardize the school's financial health.	Budgets and interim financials have not been submitted one or two times. Or, significant variances or other problems are reported without reasonable justifications. The school's financial health is potentially weakened.	Budgets and interim financials have not been submitted on several occasions. Or significant variances or other problems are reported, considerably jeopardizing the school's ability to operate as a going- concern.

**Comments:** WMST has submitted its annual budgets and interim financial statements to the PCSB on time with no material problems identified. The school's budgets tend to be conservative reflections of management's cash flow expectations.

GRADE FOR FINANCIAL REPORTING (Budgets and Interim Financials): 5.00

# Accountability Plan Performance Analysis School: <u>WMST Public Charter School</u>

#### ORGANIZATIONAL PERFORMANCE STANDARDS: FISCAL MANAGEMENT – FINANCIAL REPORTING

2. Financial Reporting					
c. Taxes and Insurance					
Above Average 5	Satisfactory 4	Watch – Improvements Required 3	Substandard – Probation 2	Poor – Revocation 1	
Required IRS forms are filed	Required IRS forms are	Required IRS forms are	Required IRS forms are	Required IRS forms are not	
and evidence of adequate	filed and evidence of	filed, but have been late	consistently filed late. The	filed. The school does not	
insurance coverage is	minimal insurance	once or twice. Evidence of	school shows no evidence of	have adequate insurance	
provided. All documentation	coverage is provided. All	insurance is provided.	adequate insurance	coverage. Adequate	
is adequately maintained.	documentation is	Documentation is not	coverage. Documentation is	documentation is lacking.	
	adequately maintained,	properly filed or maintained.	not properly filed or		
	with minor exceptions.		maintained.		

**Comments:** The PCSB has not previously monitored schools' submission of filings to the Internal Revenue Service, so data are not available to confirm or deny that forms have been filed. Similarly, historical data on schools' level of insurance coverage are incomplete, as this criterion was previously checked onsite without documenting specific levels.

GRADE FOR FINANCIAL REPORTING (Taxes and Insurance): n/a

OVERALL GRADE FOR FINANCIAL REPORTING (AVERAGE): 4.25

#### ORGANIZATIONAL PERFORMANCE STANDARDS: FISCAL MANAGEMENT – INTERNAL CONTROLS

3. Internal Controls a. Establishment and Adherence to Internal Controls Policy										
Above Average 5	Satisfactory 4	Watch – Improvements Required 3	Substandard – Probation 2	Poor – Revocation 1						
Based on PCSB review and annual audit, school has clear, written internal controls in place to provide checks and balances. Audit indicates that all internal control policies are followed.	School has clear, written internal controls in place to provide checks and balances, with minor exceptions. Weaknesses identified by PCSB or auditor are minor and can be addressed immediately.	School has some internal controls in place. Weaknesses identified by PCSB or an auditor can be addressed over the course of the fiscal year.	School lacks some major internal controls.  Weaknesses identified by PCSB or auditor need one to two years to be addressed.  School is developing a corrective action plan.	School lacks basic internal controls and there is evidence of financial mismanagement.						

**Comments:** The PCSB has not previously directly monitored schools' adoption of internal controls, so the PCSB lacks data to affirm the existence of written policies other than what is reported by an independent auditor. The school has engaged thorough audits and appears to have responded to recommendations for improvements to internal controls and as stated earlier, no matters involving the internal control over financial reporting that are considered to be weaknesses were presented in the school's latest audit.

**GRADE FOR INTERNAL CONTROLS (Internal Controls Policy): 5.00** 

#### ORGANIZATIONAL PERFORMANCE STANDARDS: FISCAL MANAGEMENT – INTERNAL CONTROLS

3. Internal Controls b. Procurement								
Above Average 5	Satisfactory 4	Watch – Improvements Required 3	Substandard – Probation 2	Poor – Revocation				
School is in compliance with PCSB's contracting / procurement requirements.	School is in compliance with PCSB's contracting / procurement requirements, with minor exceptions noted.	School has had some violations of PCSB's contracting / procurement requirements over the course of the year. Violations were reasonably justified. Policies and procedures are in place to preclude future violations.	School has had consistent violations of PCSB's contracting / procurement requirements. A corrective plan is in development.	School has had consistent violations of PCSB's contracting / procurement requirements. Management lacks capacity to assure compliance.				

**Comments:** WMST regularly submits appropriate documentation of contracts to the PCSB for review. The PCSB believes that the school has historically been compliant in following procurement requirements. However as was identified in the FY2007 audit, WMST paid in excess of \$25K to two vendors during the 07 school year without obtaining PCSB approval.

**GRADE FOR INTERNAL CONTROLS (Procurement): 3.50** 

OVERALL GRADE FOR INTERNAL CONTROLS (AVERAGE): 4.25

# ORGANIZATIONAL PERFORMANCE STANDARDS: FISCAL MANAGEMENT – TRANSPARENCY OF FINANCIAL MANAGEMENT

4. Transparency of Financial Management a. Annual Budgets									
Above Average 5	Satisfactory 4	Watch – Improvements Required	Substandard – Probation 2	Poor – Revocation					
The schools prepares an annual operating budget, a cash flow projection and, when required, a capital budget by June 1 each year. Budget reflects thoughtful planning and detailed assumptions. These documents are certified by the Board of Trustees.  Modifications are made as necessary and are submitted to PCSB.	With some exceptions, school regularly prepares annual operating budget, cash flow projection and, as required, a capital budget. Budget reflects thoughtful planning. These documents are certified by the Board of Trustees. Modifications occur as necessary and are submitted to PCSB.	The school does not consistently submit budgets and/or modifications of budgets to PCSB. Budget lacks planning and/or clear assumptions. There appears to be a lack of consensus or understanding of the budget by board members. Corrective plans are in process and will be implemented within a fiscal quarter.	Budgets are not submitted on time and/or do not have board's approval. Clear budget policies are in development.	School lacks budget policies and procedures. The board and staff lack capacity to implement standard budgeting procedures.					

**Comments:** WMST has been very proactive in revising its budget as needed and providing updates to the PCSB. Budgets are thoughtful, show detail and provide relevant explanations. Budgets have been submitted to the PCSB on time.

GRADE FOR TRANSPARENCY (Annual Budgets): 5.00

#### ORGANIZATIONAL PERFORMANCE STANDARDS: FISCAL MANAGEMENT – TRANSPARENCY OF FINANCIAL MANAGEMENT

4. Transparency of Financial Management										
b. Management Organizations										
Above Average 5	Satisfactory 4	Watch – Improvements Required 3	Substandard – Probation 2	Poor – Revocation						
School accurately discloses relationships with its management organization. Contracts are provided to PCSB and are deemed reasonable and fair.	School accurately discloses relationships with its management organization. Contracts are provided to PCSB and are deemed reasonable and fair with few exceptions.	School does not adequately disclose relationship with organization upfront. Information is provided at PCSB's request. Contracts are unclear or present concerns in terms of financial and /or management control. There are indications of poor relationship between school and management organization.	School does not disclose relationship with organization upfront. Information is not easily obtained by PCSB. There is evidence of poor relationship between school and management organization.	School does not disclose relationship with organization upfront. PCSB cannot obtain satisfactory information.						

**Comments:** Not applicable to this school.

GRADE FOR TRANSPARENCY (Management Organizations): n/a

#### ORGANIZATIONAL PERFORMANCE STANDARDS: FISCAL MANAGEMENT – TRANSPARENCY OF FINANCIAL MANAGEMENT

4. Transparency of Financial Management c. Related Party Transactions								
Above Average 5	Satisfactory 4	Substandard – Probation 2	Poor – Revocation					
School accurately discloses transactions with related parties, as required by PCSB's guidelines.	School accurately discloses transactions with related parties, with minor exceptions.	School fails to disclose related party transactions. Information is provided at PCSB's request.	School fails to disclose related party transactions. Information is not easily obtained by PCSB. There is evidence of inadvertent mismanagement.	School does not disclose relationship with organization upfront. PCSB cannot obtain satisfactory information and/or there is evidence of unethical behavior and mismanagement.				

**Comments:** Based on the information available, the PCSB believes that the school discloses all related party transactions as required. No related party transactions were disclosed in the FY2007 audit.

GRADE FOR TRANSPARENCY (Related Party Transactions): n/a

OVERALL GRADE FOR TRANSPARENCY (AVERAGE ): 5.00

### ORGANIZATIONAL PERFORMANCE STANDARDS: FISCAL MANAGEMENT – FISCAL PRUDENCE

5. Fiscal Prudence a. Balanced Budget									
Above Average 5	Satisfactory 4	Watch – Improvements Required 3	Substandard – Probation 2	Poor – Revocation					
The school has a balanced budget, based on reasonable assumptions, for the upcoming fiscal year.  Expenses are less than revenues, or there is a reasonable explanation for deficit spending. Budgeting is thoughtfully aligned with long-term financial goals.	The school has a balanced budget using reasonable assumptions. Expenses are less than revenues, or there is a reasonable explanation for deficit spending. Current spending plans will contribute to long-term financial goals.	The school has a balanced budget using some questionable assumptions. Expenses are greater than revenues for one or more years.	The school does not have a balanced budget nor has one with questionable assumptions. Expenses have exceeded revenues more often than not.	The school has no prepared budget. Expenses consistently exceed revenues.					

**Comments:** WMST has concluded each of its fiscal periods with positive net income balances, enabling the school to amass an adequate net asset reserve (see table).

Fiscal period	2004	2005	2006	2007
Net Income	\$ 93,317	\$ 292,007	\$ 785,256	\$ 566,342
Net Assets	\$ (11,723)	\$ 642,175	\$ 1,669,316	\$ 2,235,658

GRADE FOR FISCAL PRUDENCE (Balanced Budget): 4.50

#### ORGANIZATIONAL PERFORMANCE STANDARDS: FISCAL MANAGEMENT – FISCAL PRUDENCE

5. Fiscal Prudence b. Debt Capacity									
Above Average 5	Satisfactory 4	Watch – Improvements Required	Substandard – Probation 2	Poor – Revocation					
According to financial statements, school takes on debt only with very thoughtful planning and well within its debt service capacity. Standard policies are in place to prevent unnecessary and/or onerous borrowing.	According to financial statements, school stays within its debt service capacity as required by the lender. Standard policies are in place to prevent unnecessary and/or onerous borrowing.	According to financial statements, school has significant debt and has exceeded its debt service capacity, potentially violating loan covenants. School and lender are implementing remedies. Polices were in place and were followed but extraordinary circumstances led to the current situation.	According to financial statements, school has significant debt and/or has defaulted on its loan. Lender has school on a watch list. School and lender are discussing remedies. Polices were not in place or were not followed.	According to financial statements, school has significant debt and defaulted on its loan. The lender has called the loan. No remedies are possible.					

Comments: In August 2006, the school completed an arms-length transaction with the former owners to purchase the land and building where the school currently resides at a contracted sales price of \$9,000,000. To effect the transaction, the school obtained a loan from a bank in the amount of \$6,650,000 which bears interest at 7.4%. The school obtained additional financing for the purchase transaction from Building Hope, Inc., a District of Columbia not-for profit charter facilities fund, for \$500,000 which carries an annual interest rate of prime less 4.25%. The School also assumed, from the former owners of the building, a debt of \$1,000,000 from the District of Columbia Office of Public Charter School Financing and Support (OPCSFS). This loan carries an annual interest rate of 4%. Concurrently, both Building Hope and OPCSFS agreed to subordinate their underlying Deed of Trust to the first line, lien securing the bank loan and, accordingly, assumed equal priority lien status. The scheduled payments to be made by the school are intended to be sufficient to amortize the underlying mortgage notes. The school's performance of its mortgage payments is secured by mortgage liens on its building. The school is subject to compliance with a minimum debt service coverage ratio of 1.2 to 1 and facilities allowance ratio of at least 1.0 to 1.

Future maturities of all debt obligations are as follows as of June 30:

2008	\$ 114,515
2009	115,508
2010	123,622
2011	133,604
2012	7,622,790
	\$ 8,110,039

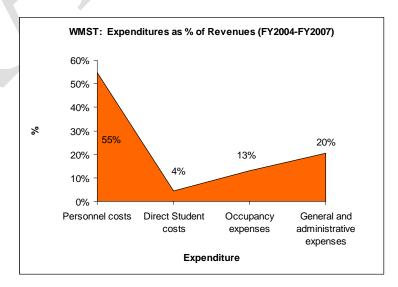
GRADE FOR FISCAL PRUDENCE (Debt Capacity): 4.25

#### ORGANIZATIONAL PERFORMANCE STANDARDS: FISCAL MANAGEMENT – FISCAL PRUDENCE

5. Fiscal Prudence									
c. Appropriate Spending Decisions									
Above Average 5	Satisfactory 4	Watch – Improvements Required 3	Substandard – Probation 2	Poor – Revocation					
School makes spending	School makes spending	School makes some	School has a record of	School has a record of					
decisions appropriate for the	decisions appropriate for	inappropriate spending	inappropriate spending	inappropriate spending					
management of educational	the management of	decisions, inadvertently.	decisions, with some	decisions which adversely					
programs. Salaries and	educational programs.	educational programs. Salaries and occupancy costs	reasonable justification.	impact programming, with no					
occupancy costs, in	Salaries and occupancy	are out of line with industry	Salaries and occupancy costs	rational justifications. There					
particular, are in line with	costs are slightly out of	comparables but still have	are considerably out of line	is evidence of unethical					
industry comparables. Minor	line with industry	sufficient justifications. A	with industry comparables.	behavior and fiscal					
variances from industry	comparables, but with	corrective plan is being	A corrective plan is in	mismanagement. Salaries					
standards are well explained	reasonable justifications.	implemented.	development.	and occupancy costs are					
and justified.				egregiously out of line with					
				industry comparables. No					
				corrective plan is feasible.					

#### **Comments:**

WMST makes spending decisions appropriate for the management of educational programs. Salaries and occupancy costs are in line with industry comparables and PCSB financial metrics. As indicated by the chart below, the school's five-year average salary and occupancy expenditures expressed as a percentage of total revenue are 55% and 13% respectively; well below PCSB established thresholds of 50% for salary and 25% for occupancy. Although salaries exceed the PCSB benchmark by 5% percentage points, salaries and occupancy when combined are substantially less than 75%; the PCSB benchmark for the aggregate of the two performance measures.



**GRADE FOR FISCAL PRUDENCE (Appropriate Spending): 5.00** 

#### ORGANIZATIONAL PERFORMANCE STANDARDS: FISCAL MANAGEMENT – FISCAL PRUDENCE

5. Fiscal Prudence										
d. Investment Decisions										
Above Average 5	Satisfactory 4	Watch – Improvements Required 3	Substandard – Probation 2	Poor – Revocation 1						
According to financial statements, school has significant liquid assets and manages them prudently, prioritizing safety over level of return. Clear written policies with board approval address how assets should be invested.	According to financial statements, school has minimal liquid assets and manages them prudently, prioritizing safety over level of return. Clear written policies with board approval address how assets should be invested.	According to financial statements, school has minimal liquid assets but their management is questionable; investment decisions appear somewhat risky.	According to financial statements, school has minimal to no liquid assets. Any assets invested are in high-risk/questionable areas.	According to financial statements, school has no liquid assets or minimal assets with no track record of investment decisions.						

**Comments:** WMST has been able to successfully manage its working capital needs and with the exception of FY04 has been able to generate positive working capital balances at the conclusion of each fiscal period (see table below).

Fiscal period	2004	2005	2006	2007
Net working capital	\$ (298,819)	\$ 327,117	\$ 1,364,501	\$ 1,031,370
Liquidity ratio	\$ 0.58	\$ 2.58	\$ 8.78	\$ 2.63

**GRADE FOR FISCAL PRUDENCE (Investment Decisions): 4.50** 

OVERALL GRADE FOR FISCAL PRUDENCE (AVERAGE ): 4.56

## ORGANIZATIONAL PERFORMANCE STANDARDS: FISCAL MANAGEMENT – FISCAL PRUDENCE (SUPPORTING DOCUMENTATION)

WMST				ET ANALYSIS			- 4 4	NDAKDS, F		
		2004		2005		2006		2007		2008
Assets										
Current Assets:										
Cash	\$	414,379	\$	533,967	\$	1,416,333	\$	1,532,569	\$	-
Accounts Receivable	\$	329	\$	329	\$	-	\$	-	\$	-
Grants Recievable	\$	-	\$	-	\$	123,611	\$	117,612	\$	-
Prepaid expenses	\$	310	\$	96	\$	-	\$	12,405	\$	-
Other Receivables	\$	-	\$	-	\$	-	\$	-	\$	-
Total Current Assets	\$	415,018	\$	534,392	\$	1,539,944	\$	1,662,586	\$	-
Fixed Assets										
PPE net	\$	287,096	\$	315,058	\$	304,815	\$	9,199,812	\$	-
Total Fixed Assets, net	\$	287,096	\$	315,058	\$	304,815	\$	9,199,812		-
		-		-		-				
Total assets	\$	702,114	\$	849,450	\$	1,844,759	\$	10,862,398	\$	
Liabilities and Net Assets										
Current liabilities										
Accounts payable	\$	44,606	\$	161,092	\$	118,650	\$	186,321	\$	-
Accrued expenses	\$	56,674	\$	46,183	\$	56,793	\$	59,505	\$	-
Contract advances	\$	307,557	\$	-	\$	-	\$	-	\$	-
Loan payable	\$	305,000	\$	-	\$	-	\$	385,390	\$	-
Total current liabilities	\$	713,837	\$	207,275	\$	175,443	\$	631,216	\$	-
I aug taum liakiltian										
Long-term liabilities Capital Lease obligations	\$	_	\$	_	\$	_	\$	_	\$	-
Note payable	\$	_	\$	_	\$	_	\$	7,995,524		_
Total liabilities	\$	713,837	\$	207,275	\$	175,443	\$	8,626,740		
	•	, ,				,		-,, <u>-</u>		
Net Assets:										
Net Income	\$	93,317	\$	292,007	\$	785,256	\$	566,342	\$	-
Beg. Net Assets	\$	(105,040)	-	350,168	\$	884,060		1,669,316	\$	-
Total Net Assets (Ending Net Assets)	\$	(11,723)		642,175	_	1,669,316		2,235,658		-
Total liabilities and net assets	\$	702,114		849,450	\$	1,844,759		10,862,398		_
	*			2.25,120	_	-,,,,,,		,		
Long-term debt/ Total Equity ratio:		-		-		-		3.58		#DIV/0!
Net-working capital:	\$	(298,819)	\$	327,117	\$	1,364,501	\$	1,031,370	\$	
Liquidity ratio:	*	0.58	•	2.58	•	8.78	,	2.63	•	#DIV/0!

W	AST: 4-YE	AR INCOME ST	TATE	MENT ANAL	YSI	S				
		2004		2005		2006		2007		2008
Revenue:										
Support and revenue:										
Fees and grants from government agencies	\$	3,994,215	\$	4,645,559	\$	5,898,628	\$	6,469,030	\$	-
Total revenue	\$	3,994,215	\$	4,645,559	\$	5,898,628	\$	6,469,030	\$	-
Expenses:										
Personnel costs	\$	2,220,731	\$	2,565,363	\$	3,085,880	\$	3,601,745	\$	-
Direct Student costs	\$	96,033	\$	253,707	\$	261,953	\$	334,961		
Occupancy expenses	\$	747,615	\$	705,597	\$	736,172	\$	327,972	\$	-
General and administrative expenses	\$	836,519	\$	828,885	\$	1,029,367	\$	1,638,010	\$	-
Total expenses	\$	3,900,898	\$	4,353,552	\$	5,113,372	\$	5,902,688	\$	-
Net Income	¢	93,317	\$	292,007	\$	785,256	¢	566,342	\$	
Beginning Net Assets	<u>Ψ</u>	(105,040)	_	(11,723)		· ·	\$	1,669,317	\$	
Total Net Assets (Year End Balance)	\$	(11,723)		642,175		1,669,317	\$	2,235,659	•	
Profit Margin		2%		6%		13%		9%		#DIV/0!
Personnel costs/Total Revenue		56%		55%		52%		56%		#DIV/0!
Direct Student costs/Total Revenue		2%		5%		4%		5%		#DIV/0!
Оссирансу expenses/Total Revenue		19%		15%		12%		5%	_	#DIV/0!
G&A expenses/ Total Revenue		21%		18%		17%		25%		#DIV/0!

# Appendix G

# **COMPLIANCE REVIEW**

Washington MST Public Charter School October 11, 2007

Name of School Date of Review

Bennie Adams and Arlene King-Berry

Name of Reviewer

District of Columbia Public Charter School Board

SITE VISIT REVIEW	INDICATORS	Examples of what to look for	EVIDENCE	COMMENTS	YES/NO
QUESTIONS A. Student	✓ Enrollment	(tools, records, contracts, etc.) Copy of flyer or advertisement	Exhibit 6	Open House	Yes
Enrollment,	procedures were publicly	Copy of fixer of advertisement	Exhibit 0	Open House	108
Attendance, and	announced.	registration/application	Exhibit 7		
Discipline	Can you tell me how you publicized your enrollment	Copy of school newsletter Invoice of payment to newspaper		No school newsletter School did not advertise in a newspaper	
Has the enrollment	procedures?  ✓ Cutoff date for	- 1			NT.
process been	enrollment was	Copy of invoice Copy of school newsletter		The school only used a sign hung outside of the school	No
conducted in a manner that is fair	announced in advance.	Application		nung outside of the senoor	
and consistent with	What was the period for				
the law, the Charter	open enrollment (start date,				
Agreement, and the	end date)?				27/1
school's announced procedures?	✓ Lottery, if needed, was conducted fairly.	Copy of lottery process		No lottery was held	N/A
	How many students applied for admission? Did you conduct a lottery for open slots? What was your lottery process? What were your lottery results?				
	✓ Waiting list is accurately maintained.	Copy of waiting list	Exhibit 8		Yes
	Students are enrolled in	Check waiting list to see whether			
	order from list.	students have been accepted			
	D	since, and in the order of the			
	Do you have a waiting list for students?	wait list			

SITE VISIT REVIEW	INDICATORS	Examples of what to look for (tools records contracts etc.)	EVIDENCE	COMMENTS	YES/NO
B. Are student daily attendance and changes in student enrollment being carefully documented?	✓ Daily attendance reports are on file.	(tools, records, contracts, etc.)  Examine attendance system in file cabinet or computer  Ask to see printed attendance records from 5 random days since the beginning of the year  What attendance system is used?  Does the attendance system show which students are absent and which are present (i.e. is it exception-based or does it		Recorded on the computer and hand written copies  SASI	Yes
	✓ Student roster is regularly updated—reflects withdrawals, transfers, new registrations, etc.	require an affirmative "present")?  Current copy of student roster  Get the name and title of the staff person responsible for updating your student roster  How are you recording students who leave your school? (e.g., those who transfer, those who dropout, expelled, etc. – see the records of any for this year, or last year if necessary	Exhibit 9	Ms .Cla;yton/Attendance coordinator  The counselor generates a list (no drop outs or expulsions)	Yes
C. Are student suspension and expulsion policies being fairly administered? Have due process procedures been followed?	✓ Suspension and expulsion policies were disseminated to students, parents, & staff.	Copy of the parent handbook  Do you have parents sign to acknowledge that they've received a parent handbook?  Parental sign-off sheets  Check handbook for the school disciplinary policy	Exhibit 10  Exhibit 10/Page 25	The school uses an agenda book as its handbook	Yes

SITE VISIT REVIEW	INDICATORS	Examples of what to look for	EVIDENCE	COMMENTS	YES/NO
QUESTIONS		(tools, records, contracts, etc.)			
	✓ There is documentation of the basis for each decision to suspend or	How do you document suspensions/expulsions?  Review documentation of at	Exhibit 11	Teacher Disciplinary Referral form	Yes
	✓ There is evidence that	least one suspension and one expulsion			
	✓ There is evidence that due process procedures have been followed.	Copies of letters informing parents of right to hearing in their native language	Exhibit 12		Yes
		Copies of Manifestation Hearing notes for students identified with special needs suspended 10 consecutive days or 10 cumulative days in a school year.		There has been no 10 day suspensions	
		Notes from long-term suspension and expulsion hearings		There has been no long term suspension or expulsions	
	✓ Suspensions of 5 days or more and expulsions are promptly reported to	Check attendance sheet for 5 day suspensions (or more) and expulsions			Yes
	PCSB.	Correspondence notifying PCSB		Monthly report to the board has not been completed	
D. Are student records stored and managed within a	✓ Records are available to authorized personnel.	Who at the school is authorized to have access to students' records?		Administration, counselor, teachers, special education coordinator	Yes
secure environment?		Check to see if there is a log that shows when someone has removed and returned a student file		All request for records are made through the assistant principal	
	✓ Records are stored in locked area.	How are they secured?  Principal's office, main office file cabinets, other locked area		Locked in cabinets  Student record room	Yes

SITE VISIT REVIEW QUESTIONS	INDICATORS	Examples of what to look for (tools, records, contracts, etc.)	EVIDENCE	COMMENTS	YES/NO
	✓ Policies and procedures exist for safeguarding student privacy.	Safeguarding policy statements, administrative handbook, office manager handbook, etc.	Employee Handbook Page 26		Yes
E. Are Special Education and physically disabled students (section 504) being properly identified? Are required special education assessments being	✓ Documentation of parent receipt of Special Education Procedural Manual for Parents exists.	Copies of parental receipt			Yes
	✓ Current* IEPs are on file for students receiving special education services.  *(not more than one year old)	Check that current IEPs are in files for at least a 10% sampling of special education students from roster			Yes
conducted? Are IEPs on file for every student receiving special education services?	✓ Special education assessments are completed within 120 days of referral.	See an example from previous yearWhen was the student referred for special education? When was the student assessed? Check to ensure assessment results are in the student's file.			Yes
		Have you had any students newly referred for special ed this year? Have assessments been scheduled/completed?		No students have been referred	
	✓ Invoices are on file to show documentation of special education services. (for IEPs reviewed)	Copy of invoices Copy of contracts			Yes
F. Are English Language Learners (ELLs) being properly identified, assessed, and served?	✓ ELL students are properly identified.	There is a home language survey (HLS) in EVERY students' cumulative folder.		There were no home language surveys	No

SITE VISIT REVIEW QUESTIONS	INDICATORS	Examples of what to look for (tools, records, contracts, etc.)	EVIDENCE	COMMENTS	YES/NO
	✓ Students identified as PHLOTE (Primary Home Language Other Than English) by the Home Language Survey, are administered the Kindergarten WIDA ACCESS Placement Test (K-WAPT) or the WIDA ACCESS Proficiency Test (W-APT).	Copies of the Kindergarten WIDA ACCESS Placement Test (K-WAPT) or the WIDA ACCESS Proficiency Test (W- APT) results are in the students' cumulative folder.			N/A
	✓ School has clear program of instruction for ELLs.  (All schools are required to have a written plan on file, regardless of having or not having ELLs enrolled.)	School should have written procedures and identified services on file (i.e. English as a Second Language, transitional Bilingual education, or bilingual immersion program). Clear, documented criteria for amount and level of student services based on assessment results.		Ms. Birchett and Ms. Saggs- Thomas have developed a plan	Yes
	✓ School has appropriate resources and supports available for ELLs.	For example: ESL resource center, bilingual and native language texts and supplemental materials, tutoring, etc.			Yes
	✓ All NEP/LEP students are assessed at least annually and FEP students continue to be assessed for two years after being mainstreamed.	Student roster of ELLs Copies of ACCESS results and test date in student folders			N/A
	Students are exited from language support programs when they have reached appropriate English proficiency levels.	Copy of exit notification forms and monitoring service forms			N/A

SITE VISIT REVIEW QUESTIONS	INDICATORS	Examples of what to look for (tools, records, contracts, etc.)	EVIDENCE	COMMENTS	YES/NO
QUESTIONS	✓ School provides communication to homes in native languages that families can understand.	Evidence of reasonable accommodations to communicate to families (contracts with translators and interpreters, copies of translated flyers, notices, school policies, etc.)		There are several staff personnel that can act as translators	N/A
G. Are student health records, such as proof of immunization, evidence of allergies, and documentation of health problems being kept accurately and securely?	✓ Student health records exist and are up to date.	Do you have a nurse? If not, who verifies that student immunizations are up to date? How is the verification handled?  Copies of student registration forms Checklist of required items for admittance Copies of student application		Full time nurse-Ms Parker	Yes
H. Reporting Student Information	✓ Records are stored in a locked area when not in use.	File cabinet in main office  Special Education Coordinator's  Office		Locked in file cabinets  Special ed. office	Yes
Are reports on student progress available to students and/or parents in regular intervals?	✓ Teachers are made aware of student health conditions that may require emergency response.	Do you have records that teachers have been notified of these conditions?  See written sign-off sheet if possible		Special ed. office	Yes
	✓ Students and/or parents receive regular written reports of student performance.	What type of progress reports does the school make, and how often?  [for 'small' schools (<500 students), request the progress reports for 3 students per grade; for 'large' schools (>500), request the progress reports for 5 students per grade – you can pick the names from the roster]		Progress reports are issued mid quarter and report cards are issued quarterly	Yes

SUMMARY COMMENTS AND RECOMMENDATIONS – STUDENT PRACTICES:

## II. STAFF INFORMATION

SITE VISIT REVIEW QUESTIONS	INDICATORS	Examples of what to look for (tools, records, contracts, etc.)	EVIDENCE	COMMENTS	YES/NO
A. Does the school maintain adequate personnel records for staff?	✓ Every employee has an employment agreement (contract) and a job description.	Ask to see roster of current staff, with position titles and functions  See example of employee contract for at least 10% of random employees  Contracts, Offer letters, Employment Agreements	Exhibit 13		Yes
B. Have background checks been conducted for all employees and volunteers who work over 10 hours per week?	✓ Documentation of background checks for all new employees and volunteers is on file.	Check that each employee has current check on file  Ask to see their volunteer list and check for those with more than 10 hours  What service do you use to do your background checks (e.g., Metropolitan Police Dept, etc?) (If the service is not MPD, look at service agreement.)		No 10 hour volunteers  MPD and Beltrante and Associates	Yes
C. Has an employee handbook been developed, distributed to personnel, and regularly updated?	✓ An employee handbook is on file and available to all staff.	Check to see key sections: sexual harassment, equal opportunity hiring, drug-free workplace, etc.			Yes
D. Does the school have a complaint resolution process for employees?	✓ The complaint resolution process is on file and available to staff.	Employee handbook Human Resource Guide			Yes

### II. STAFF INFORMATION

SITE VISIT REVIEW QUESTIONS	INDICATORS	Examples of what to look for (tools, records, contracts, etc.)	EVIDENCE	COMMENTS	YES/NO
E. Are key personnel changes promptly reported to the Charter Board?	✓ Documentation exists to demonstrate that the school has reported key personnel changes to the Board. [this applies to administrative positions]	Letters, memo to PCSB of BOT or administrative change			N/A

SUMMARY COMMENTS AND RECOMMENDATIONS – STAFF PRACTICES:

# III. SITE MANAGEMENT

SITE VISIT REVIEW QUESTIONS	INDICATORS	Examples of what to look for (tools, records, contracts, etc.)	EVIDENCE	COMMENTS	YES/NO
A. Are required insurance certificates on file at both the school and the Charter Board office, and are they in force?	✓ Insurance certificates meeting charter requirements are on file at the school and the Charter Board office.	See copy of insurance certificates at each site	Exhibit 1		Yes
B. Does the school maintain an	✓Inventories are complete.	Ask for an electronic copy	Exhibit 2		Yes
accurate inventory of all school assets, such as	✓ Sources of funds are identified.	Check inventory list to note private, per pupil, federal, etc.	Exhibit 2		Yes
furnishings, equipment, and other property?  Does the inventory indicate the source of the	✓ Equipment and furnishings are properly labeled.	Perform random check of labeling			Yes
funds—local, federal, or private—used to purchase or lease each item inventoried?					
C. Are the lease and an active certificate of occupancy on file?	✓ Lease and certificate(s) of occupancy are available for review.	See certificates for all school sites			Yes

# III. SITE MANAGEMENT

SITE VISIT REVIEW QUESTIONS	INDICATORS	Examples of what to look for (tools, records, contracts, etc.)	EVIDENCE	COMMENTS	YES/NO
D. Does the school maintain copies of all building inspections? All Fire Department inspections and fire drills?	There is a certificate showing DCFD inspections within the past year on file, and documentation of fire drills.  [Tell new schools that they need to set this up with the Fire Dept if they have not done so]  [First emergency evacuation drill within first 10 days of the beginning of the school year and monthly thereafter.  Evidence should show start/end times]	Fire drill logs  Employee training in fire emergency - New employee orientation agenda; annual faculty meeting agenda; or staff handbook with designated evacuation assignments	Exhibit 3	No drill held since May 07	No
E. Has the school obtained a Basic Business License (BBL) in order to serve food to its students?	✓ There is a BBL certificate on file from DCRA.	*Application and receipt.	Exhibit 4		Yes
Does the school engage in safe food practices as required in the D.C. Food Code?	✓ Hand washing posters are displayed at sinks and all public and private lavatories that employees may use.	Walk through and note where signs are visible (cafeteria, kitchen, teachers' lounge)			Yes
F. Is the school's Board of Trustees structured in compliance with the School Reform Act?	✓ There is an odd number of Trustees, not exceeding 15. [Attach an updated Board roster and a copy of the By-Laws for the BOT]	Board of Trustees Roster			Yes

## III. SITE MANAGEMENT

SITE VISIT REVIEW QUESTIONS	INDICATORS	Examples of what to look for (tools, records, contracts, etc.)	EVIDENCE	COMMENTS	YES/NO
	✓ A majority are residents of the District of Columbia.	Check roster for residential addresses.	Exhibit 5	Please confirm that a majority are D.C. residents.	Yes
	✓ At least two Trustees are parents of a student attending the school.			Please confirm that two members are parents of current students.	Yes
	✓ Has PCSB been notified of all Board changes, with updated contact information?				Yes
G. Is the school in compliance with the nonsectarian requirement of the School Reform Act?	✓ Is there any evidence of religious affiliation or instruction?			There was no evidence of religious affiliation or instruction.	Yes

SUMMARY COMMENTS AND RECOMMENDATIONS – SITE MANAGEMENT:

# IV. NO CHILD LEFT BEHIND

SITE VISIT REVIEW QUESTIONS	INDICATORS	Examples of what to look for (tools, records, contracts, etc.)	EVIDENCE	COMMENTS	YES/NO
A. No Child Left Behind Reporting  Has the reporting process been conducted in a	✓ The school's NCLB report card is posted in a location visible to the public. (Does not apply to first year schools, early childhood and adult ed programs.)	Main office Bulletin Board			Yes
manner that is clear, definitive and consistent with the law, the No Child Left Behind Act?	✓ Offer all students the option to transfer to another school that has not been identified for improvement. (Applies to schools "identified for improvement")	Letter to parents dated before September 1 <sup>st</sup> or within two weeks of AYP notification from PCSB.  Ask to see PCSB notification letter to confirm date.		Pending Appeal	No
	Request the option of transfer relationship with (3) schools not identified for improvement.  (Applies to schools "identified for improvement")	Letter to school leaders/Board of Trustees Response from school leaders/Board of Trustees (Please note the schools and dates the letters were sent.)			No
	✓ Offer supplemental services to identified low-income students. (Applies to schools "identified for improvement".	Invoices of supplemental services Letters to parents of low-income students offering supplemental services. (Check for the annual authorized service provider list)		WMST is in year one of school improvement and only has to offer choice.	N/A
B. No Child Left Behind Corrective Actions  Has the school adhered to corrective action measures set forth when "identified for improvement"?	✓ Develop a School Improvement Plan (Applies to schools "identified for improvement")	School Improvement Plan document		The deadline for draft school improvement plans is October 12 <sup>th</sup> . The school should have a copy of a draft available.	Yes

# IV. NO CHILD LEFT BEHIND

SITE VISIT REVIEW	INDICATORS	Examples of what to look for	EVIDENCE	COMMENTS	YES/NO
QUESTIONS		(tools, records, contracts, etc.)			27/4
	✓ Provide supplemental	Contract from supplemental			N/A
	services. (Applies to	service vendors			
	schools "identified for	Schedule of services			
	improvement")	Parental consent forms			**
C. No Child Left	✓ Ensure that all	Copies of Praxis exams		All HQT	Yes
Behind "HQT"	elementary and	Copies of License			
	secondary subject area	Official Transcript for subject			
	teachers hired after the	area degree			
	first day of the 2002-	Attestation document that			
	2003 school year are	certifies teacher qualifications			
	"highly qualified"				
	(Applies to all schools)	Comment			3.T / A
	✓ Notify parents of their	Correspondence to parents dated			N/A
	right to request	before September 1 <sup>st</sup> .			
	information on the				
	qualifications of their				
	child's teacher (Applies				
	to all schools)  ✓ Parents must be	Company dense to population			N/A
		Correspondence to parent(s)			IN/A
	notified if the child has	Identification of long-term substitute teacher			
	been taught for four or	substitute teacher			
	more consecutive weeks				
	by a teacher who is not				
	considered "highly				
	qualified". (Applies to				
	all schools)	Common demands an amounts			N/A
	✓ If request is made,	Correspondence to parents			N/A
	schools must inform	should include:			
	parents whether the teacher has met the	a) Whether the teacher has met the qualifications under NCLB for the			
	qualifications under	grade levels and subject areas in			
	NCLB to be considered	which the teacher provides			
	"highly qualified"	instruction.			
	(Applies to all schools)	b) The baccalaureate degree major			
	(Appues to all schools)	of the teacher, and any other			
		graduate certification or degree held			
		by the teacher in the field or			
		discipline of his/her certificates or			
		degrees.			

## IV. NO CHILD LEFT BEHIND

SITE VISIT REVIEW QUESTIONS	INDICATORS	Examples of what to look for (tools, records, contracts, etc.)	EVIDENCE	COMMENTS	YES/NO
D. No Child Left Behind "HQ" paraprofessionals	✓ Do the paraprofessionals meet the HQT requirements? (Applies to all schools)	<ul> <li>a) Associates degree or</li> <li>b) Two years of higher education or</li> <li>c) Paraprofessional Praxis exam</li> </ul>		No paraprofessionals on staff.	NA

SUMMARY COMMENTS AND RECOMMENDATIONS – NO CHILD LEFT BEHIND:

# V. ACCOUNTABILITY PLAN

# Appendix H

#### Washington Math Science and Technology PCS Compliance Review

#### I. STUDENT INFORMATION

#### A. Student Enrollment, Attendance, and Discipline

Has the enrollment process been conducted in a manner that is fair and consistent with the law, the Charter Agreement, and the school's announced procedures?

Indicator	Evidence	Compliant
	Invoice from Newspaper Organization and Ad Proof	Yes
ii. Cutoff date for enrollment was announced in advance.	Printed Application	Yes
iii. Lottery, if needed, was conducted fairly.	Waiting List	Yes
iv. Waiting list is accurately maintained. Students are enrolled in order from list	Waiting List	Yes

Comments

Rolling enrollment, takes students in order of application

#### B. Student daily attendance and changes in student enrollment are carefully documented.

Indicator	Evidence	Compliant
<ol> <li>Daily attendance reports are on file.</li> </ol>	Attendance Card	Yes
ii. Student roster is regularly updated.	Aug/Sept Rosters	Yes
iii. There is a functioning Student Support Team in place at the site level. An		Yes
identified homeless liaison is required as part of the SST.	SST member list with	
	identified homeless liaison	

#### $C.\ Student\ suspension\ and\ expulsion\ policies\ are\ fairly\ administered\ and\ due\ process\ procedures\ have\ been\ followed.$

Indicator	Evidence	Compliant
i. Suspension and expulsion policies were disseminated to students, parents, &	Signed Signature Page of	Yes
staff.	Student Handbook on file.	
ii. The basis for suspensions and expulsion recommendations are clearly		Yes
outlined. (A) There is a recommendation step in the expulsion process. (B)		
There is at least one distinct level of appeal (i.e. Principal, Hearing Officer, BO)	Discipline policy in student	
etc.).	handbook.	
iii. There is evidence that due process procedures have been followed.		Yes
	Parent Notification Letter	

Comments:			
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#### D. Student records are stored and managed within a secure environment.

Indicator	Evidence	Compliant
<ol> <li>Records are available to authorized personnel.</li> </ol>	Student Sign-In/Out Log	Yes
ii. Records are stored in locked area.	Locked File Cabinet	Yes
iii. Policies and procedures exist for safeguarding student privacy.	Staff Handbook	N/A

Comments:

iii Will be placed in a revised Student/Parent handbook

#### Washington Math Science and Technology PCS Compliance Review

. STUDENT	INFORMATION	(Continued
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E. Special Education and physically disabled students (section 504) are properly identified.

Are required special education assessments being conducted? Are IEPs on file for every student receiving special education services?

Indicator	Evidence	Compliant
i. Documentation of parent receipt of Special Education Procedural Manual for	Signed Parent Receipt of	
Parents exists.	Manual	Yes
<ol> <li>Current IEPs are on file for students receiving special education services.</li> </ol>	Current IEP in Student File	Yes
iii. Special education assessments are completed within 120 days of referral.	Assessment Results	Yes
iv. nvoices are on file to show documentation of special education services.	SPED Vendor Contracts	Yes

Comments:		

#### F. English Language Learners (ELLs) are properly identified, assessed and served.

Indicator	Evidence	Compliant
i. School has clear program of instruction for ELLs.		No
ii. ELL students are properly identified.		N/A
iii. Students identified as PHLOTE (Primary Home Language Other Than		
English) by the Home Language Survey, are administered the Kindergarten		
WIDA ACCESS Placement Test (K-WAPT) or the WIDA ACCESS Proficiency		
Test (W-APT).		N/A
iv. School has appropriate resources and supports available for ELLs.		N/A
v. Students are exited from language support programs when they have reached		
appropriate English proficiency levels.		N/A
' All ATTOM CD . I		
vi. All NEP/LEP students are assessed at least annually and FEP students		27/4
continue to be assessed for two years after being mainstreamed.		N/A
vii. School provides communication to homes in native languages that families		
can understand.		N/A

ı.

No ELL students identified. Home language survey is available.

G. Student health records, such as proof of immunization, evidence of allergies, and documentation of health problems are kept accurately and securely.

Indicator	Evidence	Compliant
<ol> <li>There is a school nurse or staff certified to administer medicine.</li> </ol>	Nurse on Staff	Yes
	Compliance Certificate	
ii. Student health records exist and are up to date.	from Dept. of Health	Yes
iii. Teachers are made aware of student health conditions that may require	Teacher Notification Sign-	
emergency response.	Off Sheet	Yes
iv. Parents and students are notified of emergency response information (asthma	Emergency Posters	
and anaphylaxis).	Displayed in Building	Yes

Commontor	
Comments.	

#### H. Reporting Student Information

Are reports on student pr

Indicator	Evidence	Compliant
<ol> <li>Students and/or parents receive regular written reports of students</li> </ol>	Student Quarterly Report	
performance.	Cards	Yes

	1
	1
Comments:	1

District of Columbia Public Charter School Board

#### Washington Math Science and Technology PCS Compliance Review

#### II. STAFF INFORMATION

#### A. The school maintains adequate personnel records for staff.

Indicator	Evidence	Compliant
<ol> <li>Every employee has an employment agreement (contract) and a job</li> </ol>		
description.	Employee Contract	Yes

#### B. Background checks have been conducted for all employees and volunteers who work over 10 hours per week.

Indicator Ev		Compliant
i. Documentation of background checks for all new employees and volunteers is Most Employees have a		
on file.	Background Check	Yes

#### C. An employee handbook has been developed, distributed to personnel, and regularly updated.

Indicator	Evidence	Compliant
<ol> <li>An employee handbook is on file and available to all staff (Check key section)</li> </ol>		
sexual harassment, equal opportunity hiring, drug-free workplace, etc.)	All key sections are in place	Yes

#### ${\bf D}.$ The school has a complaint resolution process for employees.

Indicator	Evidence	Compliant
<ol> <li>The complaint resolution process is on file and available to staff.</li> </ol>	Employee Handbook	Yes
*		

Comments:
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In	handbook

#### E. Key personnel changes are promptly reported to the Charter Board.

Indicator	Evidence	Compliant
i. Documentation exists to demonstrate that the school has reported key		
personnel changes to the Board. (this applies to administrative positions)	Letter or Memo to PCSB	Yes

Commen	te.

#### Washington Math Science and Technology PCS Compliance Review

	i. Insurance certificates meeting charter requirements are on file at the school ar	Evidence	Complian
	<ol> <li>Insurance certificates meeting charter requirements are on the at the school at the Charter Board office.</li> </ol>	Current Insurance Certificate	Yes
mments:		]	
The school m	naintains an accurate inventory of all school assets.		
	Indicator	Evidence	Complian
	<ul> <li>i. Inventories are complete. (NOTE: Must include item, description, location, source of funds)</li> </ul>		No
	ii. Sources of funds are identified.	All Sources of Funds are Present	Yes
	iii. Equipment and furnishings are properly labeled. (i.e. barcode or ID number)	All Inventory are Labeled	Yes
omments:	ii. Not computerized		
	ii. Not computerized ase and an active certificate of occupancy on file.	]	
		Evidence	Complian
	ase and an active certificate of occupancy on file.	Evidence C of O	Complian Yes
. There is a lea	ase and an active certificate of occupancy on file.  Indicator		
There is a lea	ase and an active certificate of occupancy on file.  Indicator  i. Lease and certificate (s) of occupancy are available for review.	C of O	
There is a lea	ase and an active certificate of occupancy on file.  Indicator	C of O	
There is a lea	ase and an active certificate of occupancy on file.  Indicator  i. Lease and certificate (s) of occupancy are available for review.	C of O	Yes
omments:	is and an active certificate of occupancy on file.  Indicator  i. Lease and certificate (s) of occupancy are available for review.  Indicator  Indicator  Indicator	ergency drills.  Evidence  Certification from DCFD	Yes Complian
There is a lea	ase and an active certificate of occupancy on file.  Indicator i. Lease and certificate (s) of occupancy are available for review.  Indicator  Indicator  Indicator  Indicator	C of O  ergency drills.  Evidence  Certification from DCFD for Required Inspections	Yes
There is a lea	is and an active certificate of occupancy on file.  Indicator  i. Lease and certificate (s) of occupancy are available for review.  Indicator  Indicator  Indicator	ergency drills.  Evidence  Certification from DCFD	Yes Complian
There is a lea	is and an active certificate of occupancy on file.  Indicator  i. Lease and certificate (s) of occupancy are available for review.  Indicator  Indicator  Indicator  Indicator  Indicator  Indicator  Indicator  Indicator	ergency drills.  Evidence  Certification from DCFD for Required Inspections School Emergency	Yes  Complian  Yes

#### Washington Math Science and Technology PCS Compliance Review

	Indicator	Evidence	Complian
	i. There is a BBL certificate on file from DCRA	BBL Certificate	Yes
	Hand washing posters are displayed at sinks and all public and private lavatories that employees may use.	Hand washing Posters are Viewed throughout the Building	Yes
	iii. There is a certified food handler/manager at the school site.	Identification and/or Certificate for Certified Food Handler	Yes
ol's l	Board of Trustees is structured in compliance with the School Reform Act.		
	Indicator	Evidence	Complian
	i. There is an odd number of Trustees, not exceeding 15.	Board of Trustee Roster w/Members Identified	Yes
	There is an odd number of Trustees, not exceeding 15.      A majority are residents of the District of Columbia.		Yes
	ii. A majority are residents of the District of Columbia.      iii. At least two Trustees are parents of a student attending the school.	w/Members Identified  Board of Trustees Roster	
	ii. A majority are residents of the District of Columbia.	w/Members Identified  Board of Trustees Roster Lists Residential Addresses Board of Trustee Roster	Yes
	ii. A majority are residents of the District of Columbia.  iii. At least two Trustees are parents of a student attending the school.  iv. PCSB has been notified of all Board changes, with updated contact	w/Members Identified  Board of Trustees Roster Lists Residential Addresses Board of Trustee Roster	Yes Yes
	ii. A majority are residents of the District of Columbia.  iii. At least two Trustees are parents of a student attending the school.  iv. PCSB has been notified of all Board changes, with updated contact	w/Members Identified  Board of Trustees Roster Lists Residential Addresses Board of Trustee Roster w/Members Identified	Yes Yes
	ii. A majority are residents of the District of Columbia.  iii. At least two Trustees are parents of a student attending the school.  iv. PCSB has been notified of all Board changes, with updated contact information.	w/Members Identified  Board of Trustees Roster Lists Residential Addresses Board of Trustee Roster w/Members Identified	Yes Yes

District of Columbia Public Charter School Board

III. SITE INFORMATION (Continued)

#### Washington Math Science and Technology PCS Compliance Review

#### IV. NO CHILD LEFT BEHIND

#### A. No Child Left Behind Notification & Corrective Actions

Indicator	Evidence	Compliant
i. The school's NCLB report card is posted in a location visible to the public.	Main Office	Yes
ii. Offer all students the option to transfer to another school that has not been		
identified for improvement		N/A
iii. Request the option of transfer relationship with (3) schools not identified for		
improvement.		N/A
	Letter to Parents Offering	
iv. Offer and provide supplemental services to identified low-income students.	SES	Yes
v. Develop a School Improvement Plan		

v. None needed

#### B. No Child Left Behind HQT

Indicator	Evidence	Compliant
	Official Transcript for	
i. Ensure that all elementary and secondary subject area teachers hired after the	Subject Area Degree (33	
first day of the 2002-2003 school year are "highly qualified."	hours)	Yes
ii. Notify parents of their right to request information on the qualifications of		
their child's teacher.		No
iii. Parents must be notified if the child has been taught for four weeks by a		
teacher who is not considered "highly qualified."		No
iv. If the request is made, schools must inform parents whether the teacher has		
met the qualifications under NCLB to be considered "highly qualified."		No
v. Paraprofessionals meet the HQT requirements of NCLB.		

Comments:

ii To be included in parent handbook. In progress

#### Washington Math Science and Technology PCS Compliance Review

#### V. SPECIAL EDUCATION

Variable #/Variable	Specific Area	Federal Requirements	Evidence	Compliant
i. § 300.340-350 - Individualized Education Programs (IEPs)	Content of IEP	Required components included in IEP		Yes
		Additional components for transition services for students age 16 and over		Yes
		Transfer of rights at least one year prior to the age of majority		No
	Provision of Services	Special education and related services are provided as indicated on IEPs		Yes
		1		
Comments:	The transfer of rights document was not evident in the student records reviewed. All IEPs contained all of the remaining required documents and were developed reviewed or revised within the required timelines. Five IEPs were reviewed and all contained evidence of Transition Plans with documentation of agencies invite to participate as part of the transition process. Special education and related services appear to be provided as indicated on IEP documents.			
ii. §300.530-534 - Protection in Evaluation Procedures	Assessment in All Areas Related to the Suspected Disability	Students are assessed in all areas related to the suspected disability		Yes
	Assessment in Student's Native Language	Students are assessed in their native language		N/A
	Reevaluations	Students are evaluated at least every three years		Yes
Comments:	All of the records reviewed showed evidence of appropriate assessments used to determine the student's disability. MDT meetings were held with the required persons and reevaluation meetings were held within the required timeline. There are no students currently attending WMST who are English Language Learners although there is evidence of the home language survey.			

District of Columbia Public Charter School Board

#### Washington Math Science and Technology PCS Compliance Review

V. SPECIAL EDUC	CATION (Continued)			
V. SI ECIAL EDUC	(Continued)			
Additional Procedures for	Additional Team Members	which evaluates students	7	/es
	Observations	Observation conducted in regular classroom by team member other than regular teacher	١	Yes
	Written Report	Written report contains all required components	1	No
Comments:	For each student determined to meet the criteria for special education services as student with a specific learning disability, documentation must include that the disability is not due to environmental, culture or economic status. This statement must be included as part of the MDT notes and minutes.			
v. §300.550-556 - Least Restrictive Environment (LRE)	All LRE areas	To the maximum extent appropriate students with disabilities participate with their non-disabled peers in academic and non-academic activities		(es
Comments:	All requirements for LRE justification were met.	]		
v. §300.300-208 - Free Appropriate Public Education	Staff Certification	Special education teachers and related services providers who work directly with students with disabilities are appropriately certified		(es
	Provision of Services	Related services included on students' IEPs are provided as specified	Y	l'es .
	Extended School Year	Extended School Year eligibility is considered to ensure FAPE	7	l'es .
Comments:		]		
3300.340-350 - individualized Education Programs IEPs)	Meetings	IEPs are developed/reviewed/revised annually	7	/es
(IEPS)	Participants in Meetings	Required persons participate in meetings to develop/review/revise IEPs General ed teacher, SPED teacher, LEA, Parent, and Student (when appropriate)		7
		Include additional participants for transition planning for students age 16 and over.	ì	/es
	Parent Participation	Parents are notified and invited to participate in IEP meeting	)	l'es
		Additional procedures are implemented to ensure parent participation	7	/es
Comments:	All IEP meetings were held within the required timelines and IEP documents contained evidence of the correct composition of the IEP team in attendance. Parental notification for the meetings was well documented and parents were in attendance to develop, review or revise the IEPs.		,	
vi. §300.560-576 - Confidentiality of	Record of Access	A record is maintained of all persons, except parents and authorized staff, who obtain access to students records. Record includes required components	7	⁄es

District of Columbia Public Charter School Board

### Charter School Annual Performance Review

### Washington Math Science and Technology PCS Compliance Review

	Parents have the right to	Yes
	inspect and review only	
Records of More Than One Child	information relating to their	
	child (or be informed only	
	of that information)	

### Charter School Annual Performance Review

### Washington Math Science and Technology PCS Compliance Review

V. SPECIAL E	DUCATION (Continued)		
	Safeguards	Program maintains, for public inspection, a current list of the names and positions of all employees who may have access to personally identifiable information	Yes
Comments:	Each student record reviewed contained an access log. All confidential information is maintained in a locked cabinet in the office of the Director of Special Education's office. In addition, there is a list of personnel who may acces the ricords posted on the outside of the locked file cabinet where the confidential records are maintained.		

## Appendix I

### DC Public Charter School Board

### Phase I - Database Review by PCSB Special Education Monitor

### **DESK AUDIT: Database Review**

School: Washington Math, Science	Date: Octobe	er 24, 2012		
Leader: Dr. N'deye Diagne	Leader: Dr. N'deye Diagne Special Education Manager: Martha Thomas			
<b>Current Total School Population:</b>	Current Number of Students with Disab	oilities: 35	Section 504 Plans:	

### Supporting Law

### Per District of Columbia School Reform Act (Chapter 18. DC Code 38-1800.01)

- 38-1802.04 (a) A public charter school shall comply with all of the terms and provisions of its charter.
  - (11) "A public charter school shall submit an annual report" that includes
  - (ii) "Student performance on any districtwide assessments."
  - (vi) "Official student enrollment."
  - (vii) "Average daily attendance."
- 38-1802.2 (B) "The methods that will be used, including classroom technology, to provide students with the knowledge, proficiency, and skills needed:
  - (ii) To perform competitively on any districtwide assessments."
  - (10) "A description of the student enrollment, admission, suspension, expulsion, and other disciplinary policies and procedures of the proposed school, and the criteria for making decisions in such areas."
  - (11)" A description of the procedures the proposed school plans to follow...to comply with...all applicable civil rights statutes and regulations of the Federal government and the District of Columbia." (includes ADA and handicapped accessibility)

### Per PCSB's Charter School Renewal Application

<u>Legal Requirements for Charter Renewal:</u> Renewal application includes: "A report on the progress of the public charter school in achieving the goals, student academic expectations, and other terms of the approved charter..."

- Criterion 1: Mission and Vision Statement- "If your school's vision and mission statement has changed since your charter was granted, in no more than three pages, provide an updated mission and vision statement applicable to the school's next charter term. Provide a narrative description of how this mission and vision statement serves the students in your school including examples reflecting this service...."
- Criterion 2: Academic Performance "...summarize the school's academic performance over the current fifteen year charter term," including "percentage of students achieving proficient and advanced performance on the SAT-9 and DCCAS exams (include past and current AYP determinations; post-secondary readiness as demonstrated by graduation rates, PSAT/SAT scores, college acceptance rates, AP exams scores, etc.;: and "student attendance and re-enrollment rates..."
  - "Reviewers will look for evidence of....Examples of school performance and reasons for those performance outcomes..."

### Special Education Monitoring and Compliance Manual (IDEA Part B), OSSE, 2011

"The IDEA Part B regulations at 34 CFR §300.600 require that the SEA monitor the implementation of DEA Part B, make annual determinations about the performance of each LEA, enforce compliance with IDEA Part B, and report annually on the performance of the SEA and each LEA. The primary focus of the SEA's monitoring activities must be on improving educational results and functional outcomes for all children with disabilities and ensuring that LEAs meet the program requirements of IDEA Part B. In exercising its monitoring responsibilities, the SEA must ensure that when it identifies noncompliance with the requirements of IDEA Part B by LEAs, the noncompliance is corrected as soon as possible, and in no case later than one year after the SEA's identification of the noncompliance."

"The IDEA Part B regulations at 34 CFR §§300.600(c) and 300.603 require the SEA to make "determinations" annually about the performance of each LEA based on information provided in the SPP/APR, information obtained through monitoring visits, and any other public information made available."

Performance Standards	Supporting Data, Evide and Information	nce	In Place	In Process	Not in Place	Does Not Exist	Comments & Documents
1. School has made	% of subgroup of SWDs	YR:				X	2002
demonstrable	achieving proficient or	5					OSSE data only goes back to 2003
improvements in the	advanced on SAT-9 and	10	X				2007: 4 SWD
academic performance	DCCAS exams for the	13	X				2010: 12 SWD
of students with disabilities (SWDs)	operation years listed:						Reading: 33.33% P & A State Reading: 14.58% P & A Math: 8.33% P & A State Math: 16.40% P & A
		14	X				2011: 8 SWD
		15	X				2012: 10 SWD
							Reading: 40.00% P & A State Reading: 22.00% P & A
							Math: 20.00% P & A State Math: 25.00% P & A
	Achievement gap by	5				X	
	percentage between	10	X				2007: 4 SWD
	SWDs and whole school	13	X				2010: 26 SWD
	population on SAT-9						Reading: 16.12% Gap
	and DCCAS exams for						Math: 31.23% Gap
	the operation years	14	X				2011: 8 SWD
	listed:	15	X				2012: 10 SWD
							Reading: 28.00% Gap
							Math: 42.00% Gap
	(High Schools Only):	10					Information not received
	Post-secondary readiness	13					Information not received
	as demonstrated by	14					Information not received
	PSAT/SAT scores for the operation years listed:	15					Information not received
	Data from all PCSB general school performance profile composite reports/reviews	e and					PCSB Program Development Review Report 10/11  2.2 strategies in place to address variant student needs  2.4 strategies in place to ensure meeting of IEP goals instructional strategies in place resources in place related services and accommodations in place 3.2 collects and analyzes data 3.4 accurate and timely identification/evaluation  proficient adequate adequate proficient proficient
2. School has implemented key elements in its mission for SWDs as well as the whole school, and has implemented key elements of the charter application and	Charter application and agreement, and any amendments		X				Charter agreement states that the school corporation will comply with all federal requirements and will administer standardized testing according to students' IEPs.

agreement as they				
apply to SWDs				
3. The school is currently compliant with OSSE, IEP, and CAP reporting requirements.	List of students counted & not counted in SEDS per 2013 child count deadline and including student eligibility determination, placement and related services	X		'11-'12 PCSB Enrollment Data – 35 SWDs Level 1: 10 Level 2: 20 Level 3: 4 Level 4: 1 35 / 306 – 11.4%
	School CAP reporting documentation for SWDs (IDEA Part B, Activities bolded under #4)			
4. The school provides data to the District on the 20 indicators in the OSSE State	OSSE documentation relevant to the charter school and the State Part B Compliance Monitoring	x		OSSE FFY 2010 IDEA Part B LEA Performance Determinations 88% Meets Requirement
Monitoring &	Part I-FAPE in the LRE			
Compliance of Part B	Indicator A: The LEA educates students in the least restrictive environment. (5)			
	Indicator B: The LEA ensures IEPs are appropriately developed and implemented.			According to SEDS (11/20/12), there are 19 overdue meetings for 2012: 1 Initial Eligibility, 8 Triennial Eligibility, and 10 IEP Review.
	Indicator C: The LEA completes evaluations within the State-established timeline. (11)			
	Indicator D: The LEA ensures that students referred by Part C have an IEP implemented by their 3 <sup>rd</sup> birthday. (6)			
	Indicator E: the LEA uses appropriate steps to successfully transition students from high school to postsecondary settings. (13)		X	OSSE Quarterly Findings 6-29-12 STR1 Education/Training Postsecondary Goal – "0% Individual Student Level and LEA level Corrections Must be Completed" STR 2 Employment Postsecondary Goal– "0% Individual Student Level and LEA level Corrections Must be Completed" STR3, STR 4, STR 5, STR 6 -"100% Criteria Met" STR 7 Transition Services Include Course of Study – "0% Individual Student Level and LEA Level Corrections Must be Completed"
	Indicator F: The LEA utilizes appropriate discipline			OSSE Quarterly Findings and Corrections Secondary Transition – 3 findings, under review
	appropriate discipine			

processes and procedures. ((4) Indicator G: The LEA does not have a disproportionate representation of students in special education or specific disability categories. (9, 10)			
Indicator H: The LEA provides instructional materials to blind persons or other persons with print disabilities in a timely manner.		X	N/A
Part II-Dispute Resolution  Indicator A: The LEA timely implements due process complaint requirements. (17)  Indicator B: The LEA timely	X		OSSE FFY 2010 IDEA Part B LEA Performance Determinations Item 3b – Dispute Resolution Findings "LEA has 26-50 students with IEPs 1-4 findings of noncompliance."
responds to State complaint requests and decisions. (16)  Indicator C: The LEA voluntarily engages in mediation when requested by parents/guardians. (19)			
Part III-Data			
Indicator A: A. The LEA submits timely, valid and reliable data. (20)	X		OSSE FFY 2010 IDEA Part B LEA Performance Determinations Item Number 2 Information regarding timely, valid and reliable data - "All data are valid and reliable and submitted timely"
Indicator B: The LEA uses data to inform decision-making. (20)			
Part IV – Fiscal Indicator A: The LEA expends IDEA Part B funds in accordance with Federal laws, state laws and approved budget and spending plans. E. The LEA does	X		OSSE FFY 2010 IDEA Part B LEA Performance Determinations Item 5- Timely submission of Phase I and II Applications and the sub-recipient sought valid reimbursement for a minimum of 45% of its IDEA, Section 611 funds within the first fifteen months of the FFY 2010 grant cycle
Indicator B: The LEA uses IDEA Part B funds only to pay the excess costs of providing special education and related services to	X		See Indicator A

	children with disabilities.				
	Indicator C: C. The LEA	X			OSSE FFY 2010 IDEA Part B LEA Performance Determinations
	meets its maintenance of				Item 6
	effort requirement				"LEA in compliance with the IDEA Maintenance of Effort (MOE) requirement and
					reported on MOE to OSSE timely"
	Indicator D: The LEA			X	N/A
	properly calculates and				
	expends CEIS funds.				
	Indicator E: the LEA does not				
	comingle IDEA Part B funds				
	with other funds.				
5. The school has	TBD			X	N/A
complied with					
reporting requirements					
for students with					
Section 504 Plans					
6. School ensures	Assurances that facility aligns				
facility is accessible to	with ADA requirements				
disabled students					

## Appendix J



### **ENCLOSURE 2**

### FEDERAL FISCAL YEAR (FFY) 2010 IDEA PART B LEA PERFORMANCE DETERMINATIONS

LEA:	Washington Mathematics Science Technology Public Charter School
Final Percentage Rating:	88%
Determination Level:	Meets Requirements

### **SUMMARY OF EACH REQUIRED ELEMENT AND RATING ASSIGNED**

Item Number	Element	Determination	
1	History, nature and length of time of any reported noncompliance (APR Indicators 4b, 9, 10, 11, 12, and 13)	<ul> <li>Indicator 4b – N/A</li> <li>Indicator 9 – in compliance</li> <li>Indicator 10 – in compliance</li> <li>Indicator 11 – N/A</li> <li>Indicator 12 – N/A</li> <li>Indicator 13 – not in compliance</li> </ul>	2
2	Information regarding timely, valid and reliable data	All data are valid and reliable and submitted timely	4
<b>3</b> a	Identified noncompliance from on-site compliance monitoring and/or focused monitoring (student and/or LEA level)	<ul> <li>LEA did not receive a report in FFY 2010 as the result of an on-site monitoring visit</li> </ul>	N/A
3b	Dispute resolution findings (student and/or LEA level)	LEA has 26-50 students with IEPs  • 1-4 findings of noncompliance	3

4	Outcomes of sub-recipient audit reports	<ul> <li>Timely submission of A-133 Report (if applicable) – 4 points</li> <li>Type of Auditor's A-133 Report Issued on Compliance (if applicable) – 4 points</li> <li>Significant deficiencies identified by the Auditor that are not a material weakness in the A-133 Report (if applicable) – 4 points</li> <li>Material weaknesses identified by the Auditor in the A-133 Report (if applicable) – 4 points</li> <li>Auditor's designation as low-risk subrecipient in the A-133 Report (if applicable) –0 points</li> <li>Significant deficiencies identified by the Auditor that are not a material weakness in the annual independent audit – 4 points</li> <li>Material weaknesses identified by the Auditor in the annual independent audit – 4 points</li> <li>Noncompliance or other matters identified by the Auditor that is required to be reported under Government Auditing Standard – 4 points</li> </ul>	3.50 (average points)
5	Other data available to OSSE regarding the LEA's compliance with the IDEA, including, but not limited to, relevant financial data	<ul> <li>Timely submission of Phase I and II Applications and the sub-recipient sought valid reimbursement for a minimum of 45% of its IDEA, Section 611 funds within the first fifteen months of the FFY 2010 grant cycle</li> </ul>	4
6	Compliance with the IDEA Maintenance of Effort (MOE) requirement	<ul> <li>LEA in compliance with the IDEA Maintenance of Effort (MOE) requirement and reported on MOE to OSSE timely</li> </ul>	2
7	Performance on selected District of Columbia State Performance Plan (SPP) indicators	<ul> <li>LEA did not meet minimum "n" size for disability subgroup</li> <li>The LEA did not serve students in this category</li> </ul>	N/A N/A

8	Evidence of correction of findings of noncompliance, including progress toward full compliance (points added to total score)	<ul> <li>Less than 90% of noncompliance corrected within one year after the identification of the noncompliance</li> </ul>	0
	Total	Number of Points Earned + Additional Points	18.50
		Number of Points Earned + Additional Points otal Possible Points from Applicable Elements	18.50 21

### Appendix K



June 29, 2012

Dr. N-Deye Diagne Interim Head of School Washington Math Science Technology Public Charter School 1920 Bladensburg Road, NE Washington DC, 20003

Dear Dr. Diagne:

The U.S. Department of Education, Office of Special Education Programs (OSEP) determined the District of Columbia to need intervention in meeting the requirements of Part B of the Individuals with Disabilities Education Act (IDEA). OSEP issued a letter to the Office of the State Superintendent of Education (OSSE) informing them that the U.S. Department of Education has imposed Special Conditions on OSSE's FFY 2011 grant awards under IDEA. OSSE was required to develop a Corrective Action Plan (CAP) to address noncompliance in specific areas. Pursuant to OSSE's CAP, which requires quarterly reporting of noncompliance in specific areas, OSSE has reviewed data in the Special Education Data System (SEDS) to identify noncompliance and assess progress toward federal and local targets for special education. OSSE reviewed data in SEDS for your LEA to determine compliance in the following areas.

### **Initial and Reevaluation Timelines**

In order to improve compliance with timely evaluations and reevaluations, OSSE is required to report to OSEP the percent of initial evaluations and reevaluations provided to children with disabilities whose evaluation deadlines fell within the reporting period that were conducted in a timely manner. OSSE is also required to report on the percent of initial evaluations and reevaluations that were provided for children whose initial evaluation and reevaluations had become overdue in a prior reporting period (backlog). For each quarterly reporting period, the level of compliance for timely evaluations must increase until 95% of initial evaluations and reevaluations are completed in a timely manner.

### **Early Childhood Transition Timelines**

In order to improve compliance with early childhood transition timelines, OSSE is required to report to OSEP the percent of children referred by Part C prior to age 3, who are found eligible for Part B, and who have an IEP developed and implemented by their third birthdays. In addition, OSSE is required to report to OSEP the range of days beyond the third birthday when eligibility was determined and the IEP developed and the reasons for the delays in providing a timely evaluation and IEP.

### **Secondary Transition Requirements**

In order to improve compliance with secondary transition requirements, OSSE is required to complete a random sampling of at least 100 individualized education programs (IEPs) of youth aged 16 and above to be reviewed for IEP secondary transition content during each quarterly reporting period. For

each quarterly reporting period, the level of compliance for secondary transition requirements must increase until 95% of IEPs reviewed are compliant with secondary transition requirements.

### **Identification of Noncompliance**

OSSE's review of Washington Math Science Technology PCS data revealed noncompliance for secondary transition requirements. This letter serves as notification of noncompliance from OSSE's database review for the period January 1, 2012 – March 31, 2012.

To demonstrate correction of the LEA's noncompliance, the LEA must provide student level correction and ensure future LEA compliance. The LEA must also ensure future compliance with each requirement. This may be accomplished by demonstrating that the LEA has met full compliance via the following quarterly review.

Area of Monitoring	Corrective Actions	Due Date
Evaluation: Initial & Reevaluation	N/A	N/A
Early Childhood Transition	N/A	N/A
Secondary Transition	See attached worksheet.	October 1, 2012

OSSE is committed to supporting LEA efforts to improve results for children with disabilities and will continue to provide technical assistance opportunities to assist Washington Math Science Technology PCS as it works to improve performance under Part B of IDEA. If you have any questions about this communication, please do not hesitate to call your OSSE LEA Contact, Denise Nedab at (202) 741-5521 or Mary Boatright, Director of Monitoring & Compliance at 202-741-0264.

Sincerely,

Mary Boatrift for any Marsterra Amy Maisterra, Ed.D., MSW

Assistant Superintendent of Specialized Education

Enclosures



### Directions for Correcting Student Level Findings from Database Review

### Step 1: Review the compliance summary.

The purpose of the compliance summary is to provide the LEA with a summary of the quantitative data collected from the database.

For any item in which an LEA has noncompliance, the LEA must demonstrate compliance at the next quarter's data review.

### Step 2: Review all student level noncompliance.

All instances of noncompliance must be corrected at an individual student level. The LEA validator must fill in the Corrective Action Code and the date of correction for each student prior to submitting this report to OSSE. The page must be signed and dated by the LEA validator.

### Corrective Action Code:

- 0 = Correction not yet made
- 1 = Correction has been made as required for this student
- 2 = Student is no longer enrolled in services with this LEA
- 3 = Student no longer receives Special Education Services

### Step 3: After all student level noncompliance has been corrected, sign and date the student level form.

When corrections have been made for all items of noncompliance for each student, the appropriate administrator (Chief Executive Officer) must sign and date the student level tracking sheet.



### Step 4: Submit verification of correction.

After the appropriate administrator has signed and dated the form, notify OSSE that the corrections have been completed.

Submit evidence, as required, to OSSE for verification of corrections.

<u>Step 5: Sign and date Certification.</u> Upon completion of ALL student level corrections, the appropriate LEA administrator (Chief Executive Officer) responsible for ensuring that corrections have been made must sign and date the certification form.

### Step 6: Submit the Certification form and all signature pages of the report.

Submit the Certification page and ALL signature pages to:

Mary Boatright
Director of Monitoring & Compliance
OSSE, Department of Specialized Education
810 First Street, NE, 5th Floor
Washington, DC 20002

# Washington Math Science Technology PCS

April 2012 Compliance Monitoring Report



Date of Notification: June 29, 2012 All Corrections Due by: October 1, 2012 Prepared by: OSSE Quality Assurance & Monitoring Unit

# Washington Math Science Technology PCS 2011-2012 Secondary Transition Monitoring Report

Date of Notification: June 29, 2012

All Corrections Due By: October 1, 2012

2010-2011 Compliance Criteria

95% or above

Legal Reference   N=   Yes   No   NA   Percentage   \$300.320(b)			S	econd	Secondary Transition	nsition		
\$300.320(b) 1 0 1 0.00%   \$300.320(b) 1 1 0 1 0.00%   \$300.320(b) 1 1 1 0 100.00%   \$300.320(b) 1 1 1 0 100.00%   \$300.320(b)(2) 1 1 0 100.00%   \$300.321(a)(7) 1 1 0 100.00%   \$300.321(a)(7) 1 1 0 100.00%	Question	Legal Reference	=N	Yes	No		Percentage	Corrective Actions
\$300.320(b) 1 0 1 0.00% \$300.320(b) 1 1 0 0 100.00% \$300.320(b) 1 1 0 0 100.00% \$300.320(b) 1 1 0 100.00% \$300.320(b)(2) 1 1 0 100.00%	STR 1: Education/Training							Individual Student Level and LEA Level
\$300.320(b) 1 0 1 0.00% \$300.320(b) 1 1 0 0 100.00% \$300.320(b) 1 1 0 100.00% \$300.320(b)(2) 1 1 0 100.00% \$300.321(a)(7) 1 1 0 100.00%	Postsecondary Goal	§300.320(b)	1	0	1		%00.0	Corrections Must Be Completed.
\$300.320(b) 1 0 1 0.00% \$300.320(b) 1 1 0 0 100.00% \$300.320(b) 1 1 0 100.00% \$300.320(b)(2) 1 1 0 100.00% \$300.321(a)(7) 1 1 0 100.00%	STR 2: Employment							Individual Student Level and LEA Level
\$300.320(b)	Postsecondary Goal	§300.320(b)	-	0	-		%00.0	Corrections Must Be Completed.
\$300.320(b)	STR 3: Independent Living					3		The second of th
\$300.320(b) 1 1 0 100.00% \$300.320(b) 1 1 0 100.00% \$300.320(b)(2) 1 0 1 00.00% \$300.321(a)(7) 1 1 0 100.00%	Postsecondary Goal	§300.320(b)	-	-	0	0	100.00%	Criteria Met
\$300.320(b) 1 1 0 100.00% \$300.320(b)(2) 1 1 0 100.00% \$300.320(b)(2) 1 0 1 0.00% \$300.321(a)(7) 1 1 0 100.00%	STR 4: Annually Updated							
\$300.320(b) 1 1 0 100.00% \$300.320(b)(2) 1 0 1 0.00% \$300.321(a)(7) 1 1 0 100.00%	Postsecondary Goals	§300.320(b)	-	-	0		100.00%	Criteria Met
\$300.320(b) 1 1 0 100.00% \$300.320(b)(2) 1 0 1 00.00% \$300.321(a)(7) 1 1 0 100.00%	STR 5: Age Apppropriate							
\$300.320(b)(2)	Transition Assessments	§300.320(b)	-	-	0		100.00%	Criteria Met
\$300.320(b)(2)	Enable Meeting Postsecondary							
\$300.320(b)(2) 1 0 1 0.00% \$300.321(a)(7) 1 1 0 100.00%	Goal(s)	\$300.320	1	_	0		100.00%	Criteria Met
\$300.320(b)(2) 1 0 1 0.00% \$300.321(a)(7) 1 1 0 100.00%	STR 7: Transition Services							Individual Student Level and LEA Level
\$300.321(a)(7) 1 1 0 100.00%	Include Course of Study	§300.320(b)(2)	-	0	1		%00.0	Corrections Must Be Completed.
\$300.321(a)(7) 1 1 0 100.00%	STR 8: Student Invitation to IEP							To the same of the
1 0 0 1 NA	Team Meeting	§300.321(a)(7)	-	-	0		100.00%	Criteria Met
1 0 0 1 NA	STR 9: Agency Representative							
3200.321(b)	Invitation to IEP Team Meeting	§300.321(b)	-	0	0	-	NA	NA

## **LEA Compliance Status**

Percentage of Compliant Student Files\*

%00.0

<sup>\*</sup>LEA Compliance Status is calculated by dividing the number of students with <u>all items compliant</u> by the total number of student files reviewed. Target = 100%

### OSSE

# 2011-2012 Compliance Monitoring: Tracking the Correction of Individual Citations Washington Math Science Technology PCS

Date of Notification: June 29, 2012

All Corrections Due By: October 1, 2012

# Directions for Correcting IDEA Individual Student Noncompliance Citations

copy of this form (as part of the entire report) will be provided to the LEA so that corrections can be tracked and recorded by the LEA. Step 1: OSSE Compliance Monitor must enter all individual student citations on this form. Once all citations are entered, a paper identified. LEA Validator must enter the corrective action code and the date of correction for each student prior to submitting this The LEA is required to correct all instances of noncompliance for each student where noncompliance was report to OSSE. This page must be signed with the name and date of the LEA Validator. Step 2:

# The following corrective actions must be completed for each student when noncompliance was found.

	Individual Student Corrective Actions
STR 1: Education/Training	
Postsecondary Goal	Convene IEP meeting to develop appropriate education/training postsecondary goal.
STR 2: Employment	
Postsecondary Goal	Convene IEP meeting to develop appropriate employment postsecondary goal.
STR 3: Independent Living	
Postsecondary Goal	Convene IEP meeting to develop appropriate independent living postsecondary goal.
STR 4: Annually Updated	
Postsecondary Goals	Convene IEP meeting to develop transition goal(s).
STR 5: Age Apppropriate	
Transition Assessments	Conduct age appropriate transition assessment(s).
STR 6: Transition Services	
Enable Meeting	
Postsecondary Goal(s)	Convene IEP meeting to identify transition services.
STR 7: Transition Services	
Include Course of Study	Convene IEP meeting to identify transition services, including courses of study.

STR 8: Student Invitation to	
IEP Team Meeting	Invite the student and reconvene the IEP Team.
STR 9: Agency	
Representative Invitation to	
IEP Team Meeting	Develop policies or procedures pertaining to required participants on IEP invitation.

# Corrective Action Code:

- 0 = Correction not yet made
- 1 = Correction has been made as required for this student
  - 2 = Student no longer enrolled in LEA
- 3 = Student no longer receives special education services
- 4 = Student no longer in school (graduation, dropout, deceased)

Step 4: OSSE Compliance Monitor must verify that the correction of noncompliance (citations) have been corrected as per the LEA report. OSSE Compliance Monitor must include his/her name and date of verification when all noncompliance has been verified as Step 3: LEA Validator must submit this completed form and other evidence (as required), to OSSE Compliance Monitor. corrected.

		Date of Signature	
	Correction	Signature of OSSE Validator	
ompliance corrections.	Verification of Correction	Date of Signature	
District notes for individual student noncompliance corrections.		Signature of LEA Validator	

		_		
Date of Correction	For each student, enter date when all corrections have been completed.		Total number of students with all items compliant.	Total number of files reviewed.
LEA Action	Enter Corrective Action Code (0-4)		Total number all items	Total nur
Compliance Status	Compliance Status	Noncompliant	0	1
Ö	# ON	က	က	
	e ATS		0	
	8 ATS		1 0 0 0 0 1 0 0	
ems (apr		×	_	
File Review Items (X = Noncompliance)	a ATS		0	
viev	3 ATS		0	
Re	▶ ATS		0	
×=ie	E ATS		0	
	S ATS	×	1	
	↑ ATS	×	~	
rmation	School	Washington MST	se Summary	
aphic Info	Student First	Taja	complianc	
Student Demographic Information	Student Last	Nance	Individual Student Noncompliance Summary	
	Student	2545307468 Nance	Inc	

2011-2012 Compliance Monitoring: Tracking LEA Corrections to Address LEA Level Citations

		Washington Math Science Technology PCS	nology PCS			
Date of Notification:	June 29, 2012	All Corrections Made By:	October 1, 2012			
		Secondary Transition				
			Verification of Correction		Verification of Correction	orrection
2010-11 Criteria: 100%	LEA Total	Corrective Actions	LEA L	LEA	OSSE Signature	OSSE Date
<b>STR 1:</b> Education/Training Postsecondary Goal	<u>0.00%</u>	LEA must: - develop appropriate policy, draft policy, and/or procedure(s), - provide documentation of transmittal of policy to all staff members, - provide documentation that all IEPs developed within last 60 days contain appropriate transition goals.				
STR 1: LEA Action Log:	:b					
STR 2: Employment Postsecondary Goal	<u>0.00%</u>	LEA must: - develop appropriate policy, draft policy, and/or procedure(s), - provide documentation of transmittal of policy to all staff members, - provide documentation that all IEPs developed within last 60 days contain appropriate transition goals.				
STR 2: LEA Action Log:	<del>.</del> 60					

12			Verification of Correction	orrection	Verification of Correction	Correction
2010-11 Criteria: 100%	LEA Total	Corrective Actions	LEA Signature	LEA	OSSE	OSSE Date
STR 3: Independent Living Postsecondary Goal	100.00%	Criteria Met	No signature required.	No date required.	No signature required.	No date required.
STR 3: LEA Action Log:	<u>:</u>	No action required.				
STR 4: Annually Updated Postsecondary Goals	100.00%	Criteria Met	No signature required.	No date required.	No signature required.	No date required.
STR 4: LEA Action Log:		No action required.				
STR 5: Age Apppropriate Transition Assessments	100.00%	Criteria Met	No signature required.	No date required.	No signature required.	No date required.
STR 5: LEA Action Log:	<b>:</b> 3	No action required.				

			Verification of Correction	rrection	Verification of Correction	orrection
2010-11 Criteria: 100%	LEA Total	Corrective Actions	LEA Signature	LEA	OSSE Signature	OSSE Date
STR 6: Transition Services Enable Meeting Postsecondary Goal(s)	100.00%	Criteria Met	No signature required.	No date required.	No signature required.	No date required.
STR 6: LEA Action Log:	<del>1</del> 5:	No action required.				
STR 7: Transition Services Include Course of Study	<u>%00.0</u>	Provide training for IEP members concerning transition services, including courses of study.  Provide documentation of the above				
STR 7: LEA Action Log:	:6	to OSSE.				

			Verification of Correction	175	Verification of Correction	orrection
2010-11 Criteria: 100%	LEA Total	Corrective Actions	LEA Signature	LEA	OSSE Signature	OSSE Date
STR 8: Student Invitation to IEP Team Meeting	100.00%	Criteria Met	No signature required.	No date required.	No signature required.	No date required.
STR 8: LEA Action Log:		No action required.				
STR 9: Agency Representative Invitation to IEP Team Meeting	NA	NA	Ą	Ϋ́	Ϋ́	Ϋ́
STR 9: LEA Action Log:		NA				

### Certification of 2011-2012 Plan Completion

### **Washington Math Science Technology PCS**

**Notice of Certification:** The completion of this page by an LEA representative certifies that all data submitted are true, correct, complete and done in full compliance with all applicable state and federal rules and regulations to the best of his/her knowledge and belief.

All Corrections Due by: October 1, 2012
All Individual Student Noncompliance has been Corrected
Certified by:
LEA Representative Name:
LEA Representative Position:
LEA Representative Signature:
Date of Completion:
All LEA Level Corrective Actions have been Completed
Certified by:
LEA Representative Name:
LEA Representative Position:
LEA Representative Signature:
Date of Completion:

### Appendix L

		2008		2009		2010		2011		2012
Aggota	1	2008		2009		2010		2011		2012
Assets	-									
Current Assets:	Φ.	1.501.502	Φ	700 (71	Ф	257.077	Ф	1 222	Ф	06.51
Cash	\$	1,501,503	\$	708,671	\$	357,267	\$	1,222	\$	86,51
Accounts Receivable	\$				Φ	122.060	Φ.	1.41.0.40	Φ	165.64
Grants Recievable	\$	-	Ф	62.250	\$	123,069	\$	141,048	\$	165,64
Prepaid expenses	\$	-	\$	62,359	\$	59,779	\$	57,198	\$	54,61
Other Receivables	\$						_	100 100		201-
Total Current Assets	\$	1,501,503	\$	771,030	\$	540,115	\$	199,468	\$	306,77
Fixed Assets										
PPE net	\$	8,963,498		8749275		8388170		8012969		760136
Total Fixed Assets, net	\$	8,963,498	\$	8,749,275	\$	8,388,170	\$	8,012,969	\$	7,601,36
Total assets	\$	10,465,001	\$	9,520,305	\$	8,928,285	\$	8,212,437	\$	7,908,14
Liabilities and Net Assets										
Current liabilities										
Accounts payable	\$	39,411	\$	39,809	\$	146,700	\$	119,250	\$	127,15
Accrued expenses	\$	66,791	\$	146,257		137179		270146	\$	70,84
Defered Revenue	\$	318,299	\$	227,077	\$	117,783	\$	219,674		2178
Loan/Bond payable	\$	124,049	\$	168,284		178191		187323		2045
Total current liabilities	\$	548,550	\$	581,427	\$	579,853	\$	796,393	\$	620,41
Long-term liabilties										
Capital Lease obligations	\$	-								
Note payable	\$	7,868,443	\$	7,793,593		7612256		7424561		72165
Total liabilities	\$	8,416,993	\$	8,375,020	\$	8,192,109	\$	8,220,954	\$	7,836,94
Net Assets:										
Net Income	\$	(187,650)	\$	(902,723)	\$	(409,109)	\$	(744,603)	\$	79,71
Beg. Net Assets	\$	2,235,658	\$	2,048,008	\$	1,145,285	\$	736,176	\$	(8,42
Total Net Assets (Ending Net Assets)	\$	2,048,008	\$	1,145,285	\$	736,176	\$	(8,427)	\$	71,29
Total liabilities and net assets	\$	10,465,001	\$	9,520,305	\$	8,928,285	\$	8,212,527	\$	7,908,23
Long-term debt/ Total Equity ratio:	$\vdash$	3.84		6.80		10.34		(881.04)		101.2
Net-working capital:	\$	952,953	\$	189,603	\$	(39,738)	\$	(596,925)	\$	(313,63
Liqudity ratio:	†	2.74	ŕ	1.33		0.93	ŕ	0.25		0.4

	2008	2009	2010	2011	2012
Revenue:					
Support and revenue:					
Fees and grants from government agencie	\$ 6,038,971	\$ 5,667,154	\$ 6,434,022	\$ 6,023,242	\$ 6,423,387
Total revenue	\$ 6,038,971	\$ 5,667,154	\$ 6,434,022	\$ 6,023,242	\$ 6,423,387
Expenses:					
Personnel costs	\$ 3,933,259	\$ 4,063,045	\$ 4,128,037	\$ 4,188,093	\$ 4,108,365
Direct Student costs	\$ 547,230	\$ 912,879	\$ 1,076,751	\$ 927,010	\$ 732,503
Occupancy expenses	\$ 521,938	\$ 1,117,191	\$ 1,128,891	\$ 533,740	\$ 837,506
General and administrative expenses	\$ 1,224,194	\$ 476,762	\$ 509,452	\$ 1,119,002	\$ 665,294
Total expenses	\$ 6,226,621	\$ 6,569,877	\$ 6,843,131	\$ 6,767,845	\$ 6,343,668
Net Income	\$ (187,650)	\$ (902,723)	\$ (409,109)	\$ (744,603)	\$ 79,719
Beginning Net Assets	\$ 2,235,658	\$ 2,048,008	\$ 1,145,285	\$ 736,176	\$ (8,427
Total Net Assets (Year End Balance)	\$ 2,048,008	\$ 1,145,285	\$ 736,176	\$ (8,427)	\$ 71,292
Profit Margin	-3%	-16%	-6%	-12%	1%
Personnel costs/Total Revenue	65%	72%	64%	70%	64%
Direct Student costs/Total Revenue	9%	16%	17%	15%	11%
Occupancy expenses/Total Revenue	9%	20%	18%	9%	13%
G&A expenses/ Total Revenue	20%	8%	8%	19%	10%