

Charter Schools and Alternative Programs  
Committee Meeting  
Tuesday, February 2, 2021 4:30 PM

Virtual

## **Agenda**

1. Introductions, Renewal Process Review
2. Charter School Full Renewal Request
  - 2.(a) Portland Arthur Academy
  - 2.(b) Opal School
3. Public Comment

**Documents for Feb 2 2021 Board Committee Mtg:**

1. Agenda
2. Board Committee 20-21 Timeline
3. Renewal PROCESS

Renewal Portland Arthur Academy:

4. Board Memo
5. ODE School Profile 2019-20
6. 2019-20 Performance Framework
7. Renewal Application

Renewal Opal:

8. Board Memo
9. ODE School Profile 2019-20
10. 2019-20 Performance Framework
11. Renewal Application



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# Charter School Board Committee Meeting

## AGENDA

February 2, 2021 4:30pm -6:00pm

- I. Introductions, Renewal Process Review**
  
- II. Charter School Full Renewal Request**
  - A. Portland Arthur Academy**
  - B. Opal School**
  
- III. Public Comment**



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## Board Timeline: Charter School Contract Renewals 2020-21

**5-10 year Contract Renewal:** Portland Arthur Academy  
Opal School

### Charter Schools and Alternative Programs Committee Key Dates and Meetings:

- **January 2, 2021** – Written request and Application for 5-10 year renewal received by PPS Charter Schools Office
- **No later than January 15, 2021** – PPS Board Committee meeting to review annual charter authorizing requirements and set calendar
- **Week of February 1-5, 2021** - PPS Board Committee Work Session for both charter schools to review relevant school data
- **Week of February 8-12, 2021 (no later than February 14, 2020)** – Renewal Public Hearings for Portland Arthur Academy and Opal School (ORS 338.065(5)(c), within 45 days after receiving written renewal request)
- **Week of February 15-19, 2021** – (If needed - meeting is not statutory) Work Session, follow up to Renewal Public Hearing, review staff recommendation for both schools, recommend resolutions for full Board meeting

### Full Board Meetings:

- **March 9, 2021** – Agenda item for charter school renewals (Board Committee to determine if further presentation from schools is desired). (ORS 338.065(5)(d), within 30 days after public hearing) **Board may vote at this meeting** if public comment is offered, or--
- **March 23, 2021** –(only if Board vote not held at March 9 meeting) Board vote (business agenda, no presentations) (ORS 338.065(5)(d), within 30 days after public hearing\*)  
\*this date falls after 30-days from public hearing, but can be scheduled by mutual agreement with schools



# Board of Education Informational Report

## MEMORANDUM

**Date:** February 2, 2021

**To:** Members of the Board of Education, Charter Schools and Alternative Programs Committee

**From:** Korinna Wolfe, Area Senior Director, Multiple Pathways to Graduation

**Subject:** Charter Schools Renewals

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This memorandum provides a brief explanation of the charter school renewal purpose and criteria.

Sponsors of charter schools in Oregon are responsible for evaluating charter school performance and determining whether or not to renew the contract of the charter school based on its compliance with the law and the contract, and its performance in three domains: academic, financial, and organizational.

The National Association of Charter School Authorizers (NACSA) recommends in its *Principles & Standards for Quality Charter School Authorizing* that a formal renewal application be used as part of a fair and transparent process. This renewal application ensures that all charter schools entering the renewal process have an equal opportunity to present data and information relevant to their request for contract renewal. It also ensures that the renewal decision is based on the renewal criteria specified in ORS 338.065 and OAR 581-026-0400.

Charter school renewal evaluation includes a review of annual performance reports, annual financial audits, annual site visit, and any other information mutually agreed upon by the sponsor and the charter school. The annual Performance Framework and Report is the tool used to formalize this review.

### **ORS 338.065: Charter Schools Renewal Criteria**

(8)(a) The sponsor shall base the charter renewal decision on a good faith evaluation of whether the public charter school:

- (A) Is in compliance with this chapter and all other applicable state and federal laws;
- (B) Is in compliance with the charter of the public charter school;
- (C) Is meeting or working toward meeting the student performance goals and agreements specified in the charter or any other written agreements between the sponsor and the public charter school governing body;
- (D) Is fiscally stable and has used the sound financial management system described in the proposal submitted under ORS 338.045 and incorporated into the written charter under this section; and
- (E) Is in compliance with any renewal criteria specified in the charter of the public charter school.

(b) The sponsor shall base the renewal evaluation described in paragraph (a) of this subsection primarily on a review of the public charter school's annual performance reports, annual audit of accounts and annual site visit and review as required by ORS 338.095 and any other information mutually agreed upon by the public charter school governing body and the sponsor. [1999 c.200 §8; 2005 c.522 §1; 2009 c.691 §10; 2011 c.695 §4; 2013 c.136 §1; 2013 c.265 §8]



# Board of Education Informational Report

## MEMORANDUM

**Date:** February 2, 2021

**To:** Members of the Board of Education, Charter Schools and Alternative Programs Committee

**From:** Korinna Wolfe, Area Senior Director, Multiple Pathways to Graduation

**Subject:** Portland Arthur Academy Charter School Renewal Request

Portland Arthur Academy Charter School is a k-5 charter school in SE Portland, housed on the Ascension Catholic Church campus, enrolling 175 students. The school uses a research-based, Direct Instruction model that focuses students through a highly organized, incremental curriculum and ensures they master each skill before moving on to the next. Portland Arthur Academy is one of six Arthur Academies in the greater Portland area, which share a common curriculum, a single board of directors, and a central administrative office.

Portland Arthur Academy opened in 2005, and is in its 16<sup>th</sup> year of operation. It successfully applied for charter renewal in 2008 and 2011. The school is currently operating under a five-to-ten-year “flexible” agreement which has been extended annually to reach the statutory 10<sup>th</sup> year limit, and will terminate on June 30, 2021.

Portland Arthur Academy has formally submitted an Application for Renewal of its charter with the District. Per ORS 338.065(4)(c), this renewal term “shall be for a minimum of five years but may not exceed 10 years.” Portland Arthur Academy has requested a ten-year renewal of its charter.

Highlights of renewal term include:

- Students consistently meet or exceed District averages and State targets as a whole population and as disaggregated student groups on state assessments.
- After a focus on 3<sup>rd</sup> grade math instruction, the 2018-19 average achievement scores on state assessments increased by thirty points from the previous year.
- Annual parent satisfaction survey results consistently show that families have chosen the options of “Highly Satisfied” or “Satisfied” between 96%-100% of the time over the term of the contract.

Considerations:

- Many of the economies of scale available to Portland Arthur Academy are due to the ability to have the central office functions shared by six schools, a structure unique among the Portland charter schools.

Requests from Portland Arthur Academy for consideration in Renewal Contract:

- Portland Arthur Academy has requested an increase in the pass through percentage of State School Funds from 80% to 90% (see justification for request on pg. 20-21 of Renewal Application)

Charter schools, as schools of choice, continue to work to attract a student population that is reflective of the District's population. Portland Arthur Academy's enrollment reflects this trend, though the school has some success in this work; 6.5% of its students are English Learners (compared to 11% District k-5), 28% are Economically Disadvantaged (compared to 32.1% District k-5), 23.4% are Historically Underserved Races/Ethnicities (compared to 31.9% District k-5), and 55.6% are White (compared to 56.9% District k-5). Portland Arthur Academy has posted translated enrollment information as well as made hard copy brochures available in all the District supported languages to broaden its outreach to English Language Learners. The school continues to focus on outreach in historically underserved communities.

In academic, financial, and organizational performance, the Charter Schools Office found no areas of concern regarding statutory compliance.

The PPS Charter Schools Office submits the attached 2019-20 Oregon School Profile and 2019-20 Performance Framework and Report for Portland Arthur Academy in review of its academic performance, fiscal management, organizational stability, adherence with all applicable state laws, and compliance with all terms of the charter contract. In addition, Portland Arthur Academy's Charter Renewal Application is attached.

Attachments:

- o 2019-20 Oregon School Profile
- o PAA 2019-20 Performance Framework and Report
- o PAA Charter Renewal Application



## STUDENTS WE SERVE<sup>^</sup>

### 177 Student Enrollment

<sup>^</sup>Student enrollment as of October 1, 2019

## DEMOGRAPHICS

### American Indian/Alaska Native

Students: **0%**

Teachers: **0%**

### Asian

Students: **10%**

Teachers: **0%**

### Black/African American

Students: **6%**

Teachers: **0%**

### Hispanic/Latino

Students: **5%**

Teachers: **10%**

### Multiracial

Students: **14%**

Teachers: **0%**

### Native Hawaiian/Pacific Islander

Students: **0%**

Teachers: **0%**

### White

Students: **66%**

Teachers: **90%**

## INTRODUCTION

The At-A-Glance School and District profiles tell a story about Oregon's schools and districts. This year's profiles do not include statewide assessments data, class size data, or attendance data as a result of the necessary statewide school closures and the implementation of Distance Learning for All. The profiles present all available data not impacted by the state's response to COVID-19.

## REQUIRED VACCINATIONS

**91%**

## OUR STAFF (ROUNDED FTE)

**8** Teachers

**1** Educational assistants

**0** Counselors/Psychologists

**59%** Average Teacher retention rate

**63%** of licensed teachers with more than 3 years of experience

**Yes:** Same principal for the last 3 years?

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Portland Public Schools  
Annual Performance Framework and Report

Portland Arthur Academy  
Charter School  
2019-20 School Year

Submitted by:

Tara O'Neil  
Program Director, Charter Schools



## **Introduction**

Charter schools in Oregon are defined in statute as “...a legitimate avenue for parents, educators and community members to take responsible risks to create new, innovative and more flexible ways of educating children within the public school system. The Legislative Assembly seeks to create an atmosphere in Oregon’s public school system where research and development of new learning opportunities are actively pursued.” (ORS 338.015)

The charter schools sponsored by Portland Public Schools provide educational options for students and families as well as diversity of professional opportunities for school employees. While the district provides oversight and support to its sponsored charters, each charter school is an independent, nonprofit organization that has autonomy over its mission, strategic planning, budget, hiring, policies, and the development and implementation of its educational program.

Portland Public Schools is responsible for maintaining high standards for its sponsored charter schools, and for ensuring that charter schools are compliant with all applicable laws, that their academic programs are successful, they are financially viable, and their organizations are effective and responsibly managed. The district balances oversight with an understanding of the independence and autonomy afforded public charter schools by law.

In doing so, PPS has established the following performance framework, which is informed by best practice from the [Core Performance Framework and Guidance](#) developed by the National Association of Charter School Authorizers (NACSA). This performance framework is designed to measure each charter school’s academic, financial, and organizational performance, and to “...guide practice, assess progress, and inform decision-making over the course of the charter term and at renewal.”<sup>1</sup>

Because each charter school’s story and perspective on its own performance is critical to a balanced evaluation process, each measure includes space for narrative explanation and/or further description from both the district and the charter school. It is our hope and goal that PPS and the charter school will fully engage in the process of program evaluation each year and at the renewal period, and that this process contributes to the continuous improvement of each charter school and the PPS Charter Schools Office.

Tara O’Neil  
Program Director, Charter Schools  
Portland Public Schools

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<sup>1</sup> From NACSA’s [Core Performance Framework and Guidance](#).

## **Academic performance: data elements and sources**

The purpose of the Academic Performance section of the Annual Performance Framework and Report is to evaluate whether or not the charter school's educational program is showing success with its students.

Many of the indicators for this section are adopted from the National Association of Charter School Authorizers' "Core Performance Framework and Guidance", while the performance targets and ratings are aligned with the targets and ratings in the Oregon Report Card.

**Note: The Oregon Department of Education (ODE) will not assign summative, overall ratings to schools on the redesigned Oregon Report Card beginning in the 2017-18 school year. Instead schools are rated on up to 6 (for k-8) or 9 (for HS) separate indicators.**

The following data elements and sources are used to complete the Academic Performance analysis:

- The charter school's Oregon Report Card
- The charter school's State Assessment results
- The charter school's contract
- The district's Oregon Report Card
- The district's State Assessment results
- Performance and growth information for comparison schools, as defined by the Oregon Department of Education
- The Administrator's Dashboard

Additionally for high schools only:

- The school's graduation rate
- The district's graduation rate
- The school's completion rate
- The district's completion rate
- The school's freshmen on track rate
- The district's freshmen on track rate
- The graduation, completion, and dropout rates of comparison schools, if applicable, as defined by ODE

Additionally for grades 6-12 only:

- The charter school's alignment to Common Core State Standards as evidenced by course syllabi, course descriptions, curriculum alignments, etc.

**Note on Statewide Report Cards for 2019-20:** The Oregon Department of Education (ODE) School and District profiles do not include statewide assessments data, class size data, or attendance data as a result of the necessary COVID-19 related statewide school closures and the implementation of Distance Learning for All. The profiles present all available data not impacted by the state's response to COVID-19. **As a result, there is no comparative academic performance data to report for charter schools in the 2019-20 school year.** Page 13 begins sections on Financial and Organizational performance for the 2019-20 school year.

The 3-year Trend Performance Summary chart at the end of this document will not include summary data from 2019-20 in the Academic section, and instead will retain the data from the most recent 3 years of available academic performance data. The Financial and Organizational sections will include summary data from the 2019-20 school year.

# Academic Performance

## 1. Oregon School Rating System

<b>Measure 1a</b> Is the school meeting acceptable standards according to the Oregon State school rating system?
<b>Exceeds standard:</b> <input type="checkbox"/> School received the highest rating from the state accountability system
<b>Meets standard:</b> <input type="checkbox"/> School received a passing rating according to the state accountability system
<b>Does not meet standard:</b> <input type="checkbox"/> School did not receive passing rating according to the state accountability system
<b>Falls far below standard:</b> <input type="checkbox"/> School identified for intervention or considered failing by the state accountability system
District comments/recommendations: <b>N/A, the current version of the Oregon Report Card no longer gives single ratings to schools</b>
School comments:

<b>Measure 1b</b> Is the school meeting state designation expectations as set forth by the state and federal accountability system?
<b>Exceeds standard:</b> <input type="checkbox"/> School was identified as meeting long term academic accountability indicators as defined by Oregon's ESEA Plan
<b>Meets standard:</b> <input checked="" type="checkbox"/> School was identified as meeting interim targets of academic accountability indicators as defined by Oregon's ESEA Plan
<b>Does not meet standard:</b> <input type="checkbox"/> School was identified as falling below the interim target but not in the lowest 10% of schools as defined by Oregon's ESEA Plan
<b>Falls far below standard:</b> <input type="checkbox"/> School was identified as in the lowest 10% of schools as defined by Oregon's ESEA Plan
District comments/recommendations: The school has not been identified for Targeted (TSI) or Comprehensive (CSI) Supports.
School comments:

**Measure 1c**

How are **All Students Total (3-5)** and **by Grade Level** achieving on state assessments in English Language Arts (ELA) compared to students in the district?

**E=Exceeds standard:** School's average achievement rate exceeds the average district performance of students in the same grades by at least 10%

**M=Meets standard:** School's average achievement rate meets or exceeds the average district performance of students in the same grades by up to 10% (or within variance of one student)

**D=Does not meet standard:** School's average achievement rate is less than the average district performance of students in the same grades by 1-10%

**F=Falls far below standard:** School's average achievement rate is less than the average district performance of students in the same grades by more than 10%

Data: **NA**

*The Oregon Department of Education (ODE) School and District profiles do not include statewide assessments data, class size data, or attendance data as a result of the necessary COVID-19 related statewide school closures and the implementation of Distance Learning for All.*

School comments:

**Measure 1d**

How are **All Students Total (3-5)** and **by Grade Level** achieving on state assessments in MATHEMATICS compared to students in the district?

**E=Exceeds standard:** School's average achievement rate exceeds the average district performance of students in the same grades by at least 10%

**M=Meets standard:** School's average achievement rate meets or exceeds the average district performance of students in the same grades by up to 10% (or within variance of one student)

**D=Does not meet standard:** School's average achievement rate is less than the average district performance of students in the same grades by 1-10%

**F=Falls far below standard:** School's average achievement rate is less than the average district performance of students in the same grades by more than 10%

Data: **NA**

*The Oregon Department of Education (ODE) School and District profiles do not include statewide assessments data, class size data, or attendance data as a result of the necessary COVID-19 related statewide school closures and the implementation of Distance Learning for All.*

School comments:

**Measure 1e**

How are **Students of Special Populations** achieving on state assessments in English Language Arts (ELA) compared to the **Students of Special Populations** in the district?

**E=Exceeds standard:** School's average subgroup achievement rate exceeds the average district performance of students in the same subgroup in the same grades by at least 10%

**M=Meets standard:** School's average subgroup achievement rate meets or exceeds the average district performance of students in the same subgroup in the same grades by up to 10% (or within variance of one student)

**D=Does not meet standard:** School's average subgroup achievement rate is less than the average district performance of students in the same subgroup in the same grades by 1-10%

**F=Falls far below standard:** School's average subgroup achievement rate is less than the average district performance of students in the same subgroup in the same grades by more than 10%

Data: **NA**

*The Oregon Department of Education (ODE) School and District profiles do not include statewide assessments data, class size data, or attendance data as a result of the necessary COVID-19 related statewide school closures and the implementation of Distance Learning for All.*

School comments:

**Measure 1f**

How are **Students of Special Populations** achieving on state assessments in MATHEMATICS compared to the **Students of Special Populations** in the district?

**E=Exceeds standard:** School's average subgroup achievement rate exceeds the average district performance of students in the same subgroup in the same grades by at least 10%

**M=Meets standard:** School's average subgroup achievement rate meets or exceeds the average district performance of students in the same subgroup in the same grades by up to 10% (or within variance of one student)

**D=Does not meet standard:** School's average subgroup achievement rate is less than the average district performance of students in the same subgroup in the same grades by 1-10%

**F=Falls far below standard:** School's average subgroup achievement rate is less than the average district performance of students in the same subgroup in the same grades by more than 10%

Data: **NA**

*The Oregon Department of Education (ODE) School and District profiles do not include statewide assessments data, class size data, or attendance data as a result of the necessary COVID-19 related statewide school closures and the implementation of Distance Learning for All.*

School comments:

## 2. Student Academic Growth

<b>Measure 2a</b> Are students making expected annual academic growth in English Language Arts (ELA) compared to their peers? (Combined Median Growth Percentile)
<b>E=Exceeds standard:</b> <input type="checkbox"/> Combined median growth percentile of 55 or more
<b>M=Meets standard:</b> <input type="checkbox"/> Combined median growth percentile of between 45 and 54.9 (or within variance of one student)
<b>D=Does not meet standard:</b> <input type="checkbox"/> Combined median growth percentile of between 40 and 44.9
<b>F= Falls far below standard:</b> <input type="checkbox"/> Combined median growth percentile of less than 40
Data: <b>NA</b> <i>The Oregon Department of Education (ODE) School and District profiles do not include statewide assessments data, class size data, or attendance data as a result of the necessary COVID-19 related statewide school closures and the implementation of Distance Learning for All.</i>
School comments:

<b>Measure 2b</b> Are students making expected annual academic growth in MATH compared to their peers? (Combined Median Growth Percentile)
<b>E=Exceeds standard:</b> <input type="checkbox"/> Combined median growth percentile of 55 or more
<b>M=Meets standard:</b> <input type="checkbox"/> Combined median growth percentile of between 45 and 54.9 (or within variance of one student)
<b>D=Does not meet standard:</b> <input type="checkbox"/> Combined median growth percentile of between 40 and 44.9
<b>F= Falls far below standard:</b> <input type="checkbox"/> Combined median growth percentile of less than 40
Data: <b>NA</b> <i>The Oregon Department of Education (ODE) School and District profiles do not include statewide assessments data, class size data, or attendance data as a result of the necessary COVID-19 related statewide school closures and the implementation of Distance Learning for All.</i>
School comments:

### 3. Subgroup Growth

<b>Measure 3a</b> Is the school increasing academic performance over time in English Language Arts for <b>Students of Special Populations?</b> (Combined Median Growth Percentile)
<b>E=Exceeds standard:</b> Combined median growth percentile of 55 or more
<b>M=Meets standard:</b> Combined median growth percentile of between 45 and 54.9 (or within variance of one student)
<b>D=Does not meet standard:</b> Combined median growth percentile of between 40 and 44.9
<b>F=Falls far below standard:</b> Combined median growth percentile of less than 40
Data: <b>NA</b> <i>The Oregon Department of Education (ODE) School and District profiles do not include statewide assessments data, class size data, or attendance data as a result of the necessary COVID-19 related statewide school closures and the implementation of Distance Learning for All.</i>
School comments:

<b>Measure 3b</b> Is the school increasing academic performance over time in MATH for <b>Students of Special Populations?</b> (Combined Median Growth Percentile)
<b>E=Exceeds standard:</b> Combined median growth percentile of 55 or more
<b>M=Meets standard:</b> Combined median growth percentile of between 45 and 54.9 (or within variance of one student)
<b>D=Does not meet standard:</b> Combined median growth percentile of between 40 and 44.9
<b>F=Falls far below standard:</b> Combined median growth percentile of less than 40
Data: <b>NA</b> <i>The Oregon Department of Education (ODE) School and District profiles do not include statewide assessments data, class size data, or attendance data as a result of the necessary COVID-19 related statewide school closures and the implementation of Distance Learning for All.</i>
School comments:

#### 4. Local Performance Assessments

<b>Measure 4</b> Describe your school's Local Performance Assessments in the fields below.			
<b>What Local Performance Assessment are you using?</b>	<b>To what grades are you administering the Local Performance Assessment?</b>	<b>What subjects are you assessing through the Local Performance Assessment?</b>	<b>How are you documenting your administration of the Local Performance Assessment?</b>
School Response: In program assessments	K through 5th	Math, Reading, Writing and Spelling	Through weekly data reports
Easy CBM	K through 5th	Math and Reading	Fall reports
District comments/recommendations: Portland Arthur Academy has a robust program of Local Performance Assessments embedded in the curriculum used in all classrooms. This data is regularly reviewed by school staff and at monthly Arthur Academy Board meetings.			

## 5. Student Attendance

### Measure 5

What percentage of students at the charter school are identified as Regular Attenders (attending more than 90% of their enrolled days)?

#### **E=Exceeds standard:**

- School's percentage of Regular Attenders meets or exceeds the long term goal of 93% as set by the Oregon Department of Education

#### **M=Meets standard:**

- School's percentage of Regular Attenders meets or exceeds the Level 3 indicator by grade level as set by the Oregon Department of Education (K-5, 85%; 6-8, 83%; 9-10, 78%)

#### **D=Does not meet standard:**

- School's percentage of Regular Attenders does not meet the Level 3 indicator by grade level but is not below the 10<sup>th</sup> percentile of performance for the grade level group

#### **F=Falls far below standard:**

- School's percentage of Regular Attenders is below the 10<sup>th</sup> percentile of performance for the grade level group

Data: **NA**

*The Oregon Department of Education (ODE) School and District profiles do not include statewide assessments data, class size data, or attendance data as a result of the necessary COVID-19 related statewide school closures and the implementation of Distance Learning for All.*

School comments:

(Measures 6 and 7 omitted, apply to middle and high schools only)

## 8. School goals and recommendations (academic)

### Measure 8a

Did the school meet the academic goals it set forth in its 2019-20 Performance Plan?

Goal set in Plan	Goal achieved? (School response)	How or why not? (School response) Include any professional development implemented to support this goal.
90% of all middle reading group students in kinder and 1 <sup>st</sup> will consistently pass their reading fluency assessment throughout the year.	Yes	From September-March, students were consistently passing reading fluency assessments. Due to the pandemic, we were unable to give fluency assessments from April-June.
At least 50% of the students will receive a score of proficient in math.	N/A	PAA does not have statewide assessments data as a result of the necessary COVID-19 related statewide school closures and the implementation of Distance Learning for All.
At least 65% of the students will receive a score of proficient in ELA.	N/A	PAA does not have statewide assessments data as a result of the necessary COVID-19 related statewide school closures and the implementation of Distance Learning for All.
Improve the number of students scoring a four (4) on the OSA from the previous school year.	N/A	PAA does not have statewide assessments data as a result of the necessary COVID-19 related statewide school closures and the implementation of Distance Learning for All.
All grades will demonstrate at least 80% mastery in all DI subjects in the January 2020 2nd quarter report.	Out of the 24 groups in the school, (spelling, math, language and reading for all grades) we met the goal 22 out of the 24 times.	Kindergarten and 4th grade were under 80% in spelling. In kindergarten, we had a long term sub who was new to DI. In 4th grade, we had a new teacher who was new to the 4th grade programs.
All grades will demonstrate at least 80% mastery in all DI subjects in the June 2020 4th quarter report.	N/A	Due to the pandemic, we were unable to complete our programs in person so we do not have this data.

**Measure 8b**

In the school year 2019-20, did the school implement the academic recommendations from the district in the 2018-19 annual performance report (if any)?

Recommendation from the district	Recommendation implemented? (School response)	How or why not? (School response) Include any professional development implemented to support this goal.
No District academic recommendations were made in the 2018-19 report; all academic measures were met.		

**Measure 8c**

Based on the 2019-20 school year data presented in this report, will the school add any academic goals to its 2020-21 Performance Plan? (Copy and paste as needed for additional goals.)

Goal added to Plan: N/A				
Instructional Strategies	Rationale	Professional Development	Assess Progress	Use of Resources
We will continue with the goals we had set for the prior year since many of them were impacted by the pandemic.				
N/A				

## **Financial Performance: data elements and sources**

The purpose of the Financial Performance section of the Annual Performance Framework and Report is to evaluate whether or not the charter school is financially viable.

Many of the indicators, performance targets, and ratings for this section are adopted from the National Association of Charter School Authorizers' "Core Performance Framework and Guidance".

The following data elements and sources are used to complete the Financial Performance analysis:

- The charter school's contract
- The charter school's audited balance sheet and notes for the last three years
- The charter school's projected enrollment and actual enrollment
- The charter school's board-adopted budget
- The charter school's audited income statement and audited cash flow statement
- Annual principal and interest obligations
- Quarterly financial statements, including budget-to-actuals, profit and loss, balance sheet

# Financial Performance

## 9. Near-Term Measures

<b>Measure 9a</b> Current ratio: Current assets divided by current liabilities
<b>Meets standard:</b> <input checked="" type="checkbox"/> Current ratio is greater than or equal to 1.1
<b>Does not meet standard:</b> <input type="checkbox"/> Current ratio is between .9 and 1.0 or equals 1.0
<b>Falls far below standard:</b> <input type="checkbox"/> Current ratio is less than or equal to .9
District comments/recommendations:  Current ratio is 9.53, meets standard
School comments:

<b>Measure 9b</b> Unrestricted days cash: Unrestricted cash divided by (total expenses minus depreciation expense) / 365)
<b>Meets standard:</b> <input checked="" type="checkbox"/> 60 days cash -OR- <input type="checkbox"/> Between 30 and 60 days cash and one-year trend is positive
<b>Does not meet standard:</b> <input type="checkbox"/> Between 15 and 30 days cash -OR- <input type="checkbox"/> Between 30 and 60 days cash and one-year trend is negative
<b>Falls far below standard:</b> <input type="checkbox"/> Fewer than 15 days cash
District comments/recommendations: School has 329.5 days unrestricted cash, meets standard
School comments:

**Measure 9c**

Enrollment variance: actual enrollment divided by enrollment projection in most recent charter school board-approved budget

**Meets standard:**

Enrollment variance equals or exceeds 95% in the most recent year

**Does not meet standard:**

Enrollment variance is between 85-95% in the most recent year

**Falls far below standard:**

Enrollment variance is less than 85% in the most recent year

District comments/recommendations:

Enrollment variance is 1.04, meets standard

School comments:

**Measure 9d**

Default

**Meets standard:**

School is not in default of loan covenant(s) and/or is not delinquent with debt service payments

**Falls far below standard:**

School is in default of loan covenant(s) and/or is delinquent with debt service payments

District comments/recommendations:

Not in default, meets standard

School comments:

## 10. Sustainability Measures

### Measure 10a

Total Margin: Net income divided by total revenue

Aggregated total margin: Total 3-year net income divided by total 3-year revenues

#### Meets standard:

- Aggregated 3-year total margin is positive and the most recent year total margin is positive
- OR-
- Aggregated 3-year total margin is greater than -1.5%, the trend is positive for the last 2 years, and the most recent year total margin is positive

#### Does not meet standard:

- Aggregated 3-year total margin is greater than -1.5%, but trend does not “meet standard” (above)

#### Falls far below standard:

- Aggregated three-year total margin is less than or equal to -1.5%
- OR-
- The most recent year total margin is less than -10%

District comments/recommendations:

Aggregated 3-year total margin is 9.45%, total margin is 8.32%; meets standard

School comments:

### Measure 10b

Debt to asset ratio: Total liabilities divided by total assets

#### Meets standard:

- Debt-to-asset ratio is less than 0.9

#### Does not meet standard:

- Debt-to-asset ratio is between 0.9 and 1.0

#### Falls far below standard:

- Debt-to-asset ratio is greater than 1.0

District comments/recommendations:

Debt-to-asset ratio is 0.10, meets standard

School comments:

**Measure 10c**

Cash flow:

Multi-year cash flow = Year 3 total cash - Year 1 total cash

One-year cash flow = Year 2 total cash - Year 1 total cash

**Meets standard:**

- Multi-year cumulative cash flow is positive and cash flow is positive each year  
 -OR-  
 Multi-year cumulative cash flow is positive, cash flow is positive in one of two years, and cash flow in the most recent year is positive

**Does not meet standard:**

- Multi-year cumulative cash flow is positive, but trend does not “meet standard” (above)

**Falls far below standard:**

- Multi-year cumulative cash flow is negative

District comments/recommendations:

Multi-year cash flow is \$286,848; one-year cash flow is \$136,622; meets standard

School comments:

**Measure 10d**

Debt service coverage ratio: (net income + depreciation + interest expense) / (annual principal, interest, and lease payments)

**Meets standard:**

- Debt service coverage ratio is equal to or exceeds 1.1

**Does not meet standard:**

- Debt service coverage ratio is less than 1.1

District comments/recommendations:

Debt service coverage ratio is nearly met at 1.08, does not meet NACSA recommended standard, however the school carries no debt and has maintained a healthy cash balance. This measure is not of current concern.

School comments:

## 11. School goals and recommendations (financial)

### Measure 11a

Did the school meet the financial goals it set forth in its 2019-20 Performance Plan?

Goal set in Plan	Goal achieved? (School response)	Why or why not? (School response)
Fundraise \$28,000 to be used to purchase new lighting for the school, a refrigerator for the staff room, upgrade the office décor, all staff given \$200	Partially met.	All staff were given \$200 for classroom needs but our focus shifted from fundraising to transitioning to CDL.
Financial Audit will contain a “clean and unmodified” opinion letter. During the audit process, schools will have fewer than three adjusting journal entries and have no “material weakness” noted.	Goal met.	

### Measure 11b

In school year 2019-20, did the school implement the financial recommendations from the district in the 2018-19 annual performance report (if any)?

Recommendation from the district	Recommendation implemented? (School response)	Why or why not? (School response)
No district financial recommendations in 2018-19 report; all financial measures were met. (Financial performance measures from 2018-19 can be found on p 34, 3-yr Trend Summary.)		

**Measure 11c**

Based on the 2019-20 school year data presented in this report, will the school add any financial goals to its 2020-21 Performance Plan? (Copy and paste as needed for additional goals.)

<b>Goal added to Plan:</b>				
<b>Practical Strategies</b>	<b>Rationale</b>	<b>Professional Development</b>	<b>Assess Progress</b>	<b>Use of Resources</b>
We will continue with the same financial goals.				

## **Organizational Performance: data elements and sources**

The purpose of the Organizational Performance section of the Annual Report is to evaluate whether or not the charter school as an organization is effectively governed and well run.

Many of the indicators, performance targets, and ratings for this section are adopted from the National Association of Charter School Authorizers' "Core Performance Framework and Guidance".

The following data elements and sources are used to complete the Organizational Performance analysis:

- Site visit observations (both formal and informal)
- The charter school's contract
- Required reporting by the charter school, including all deliverables
- The school's adherence to deliverable and reporting due dates
- Feedback from parents, students, charter school staff, and other community stakeholders
- Synergy or other student information system
- The Administrators Dashboard
- The charter school's internal accountability systems
- Student enrollment forms
- The charter school's adopted board policies
- The charter school's parent/student/staff handbooks
- TSPC
- Assurances by the charter school that it is compliant with all applicable requirements

# Organizational Performance

## 12. Education Program

<b>Measure 12a</b> Is the school implementing the material terms of the education program as defined in the current charter contract?
<b>Meets standard:</b> <input checked="" type="checkbox"/> The school implemented the material terms of the education program in all material aspects and the education program in operation reflects the material terms as defined in the charter contract, or the school has gained approval for a modification to the material terms.
<b>Does not meet standard:</b> <input type="checkbox"/> The school failed to implement the material terms of the education program in all material aspects and the education program in operation does not reflect the material terms as defined in the charter contract, or the schools implemented a modification to the material terms without approval and/or a mutually agreeable amendment to the contract.
District comments/recommendations: The school materially complies with this standard.
School comments:

<b>Measure 12b</b> Is the school complying with applicable education requirements?
<b>Meets standard:</b> <input checked="" type="checkbox"/> The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to education requirements, including but not limited to: <ul style="list-style-type: none"><li>● Instructional days and/or minutes requirements</li><li>● Graduation and promotion requirements</li><li>● Content standards, including Common Core State Standards</li><li>● The administration of state assessments</li><li>● Implementation of mandated programming as a result of state or federal funding</li></ul>
<b>Does not meet standard:</b> <input type="checkbox"/> The school was materially out of compliance with applicable laws, rules, regulations, and/or provisions of the charter contract relating to education requirements, including, but not limited to: <ul style="list-style-type: none"><li>● Instructional days and/or minutes requirements</li><li>● Graduation and promotion requirements</li><li>● Content standards, including Common Core State Standards</li><li>● The administration of state assessments</li><li>● Implementation of mandated programming as a result of state or federal funding</li></ul>
District comments/recommendations: The school materially complies with this standard.
School comments:

**Measure 12c**

Is the school protecting the rights of students with disabilities?

**Meets standard:**

Consistent with the school's status as a school in a district LEA, the school materially complies with applicable laws, rules, regulations, and provisions of the charter contract (including the Individuals with Disabilities Education Act, Section 504 of the Rehabilitation Act of 1973, and the Americans with Disabilities Act) relating to the treatment of students with identified disabilities and those suspected of having a disability, including, but not limited to:

- Equitable access and opportunity to enroll
- Identification and referral
- Appropriate involvement with development and implementation of Individualized Education Plans, and appropriate development of Section 504 plans
- Operational compliance, including appropriate inclusion in the school's academic program, assessments, and extracurricular activities.
- Discipline, including due process protections, manifestation determinations, and behavioral intervention plans
- Access to the school's facility and program to students in a lawful manner and consistent with students' IEPs or 504 plans

**Does not meet standard:**

Consistent with the school's status as a school in a district LEA, the school was materially out of compliance with one or more applicable laws, rules, regulations, and provisions of the charter contract (including the Individuals with Disabilities Education Act, Section 504 of the Rehabilitation Act of 1973, and the Americans with Disabilities Act) relating to the treatment of students with identified disabilities and those suspected of having a disability, including, but not limited to:

- Equitable access and opportunity to enroll
- Identification and referral
- Appropriate involvement with development and implementation of Individualized Education Plans, and appropriate development of Section 504 plans
- Operational compliance, including appropriate inclusion in the school's academic program, assessments, and extracurricular activities.
- Discipline, including due process protections, manifestation determinations, and behavioral intervention plans
- Access to the school's facility and program to students in a lawful manner and consistent with students' IEPs or 504 plans

District comments/recommendations: The school materially complies with this standard.

School comments:

**Measure 12d**

Is the school protecting the rights of English Language Learner students?

**Meets standard:**

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract (including Title III of the Elementary and Secondary Education Act, and US Department of Education authorities) relating to requirements of English Language Learners, including, but not limited to:

- Equitable access and opportunity to enroll
- Development and implementation of required plans related to the service of ELL students
- Proper steps for identification of students in need of ELL services
- Appropriate and equitable delivery of services to identified students
- Appropriate accommodations on assessments
- Exiting of students from ELL services
- Ongoing monitoring of exited students

**Does not meet standard:**

The school failed to comply with one or more applicable laws, rules, regulations, and/or provisions of the charter contract (including Title III of the Elementary and Secondary Education Act, and US Department of Education authorities) relating to requirements of English Language Learners, including, but not limited to:

- Equitable access and opportunity to enroll
- Development and implementation of required plans related to the service of ELL students
- Proper steps for identification of students in need of ELL services
- Appropriate and equitable delivery of services to identified students
- Appropriate accommodations on assessments
- Exiting of students from ELL services
- Ongoing monitoring of exited students

District comments/recommendations: The school materially complies with this standard.

School comments:

### 13. Governance and Reporting

#### Measure 13a

Is the school meeting financial reporting and compliance requirements?

##### Meets standard:

- The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to financial reporting requirements, including, but not limited to:
- Complete and timely submission of financial reports, including: annual budget, revised budgets (when applicable), quarterly financial reports, and annual municipal audit
  - All other reporting requirements related to the use of public funds

##### Does not meet standard:

- The school was materially out of compliance with applicable laws, rules, regulations, and/or provisions of the charter contract relating to financial reporting requirements, including, but not limited to:
- Complete and timely submission of financial reports, including: annual budget, revised budgets (when applicable), quarterly financial reports, and annual municipal audit
  - All other reporting requirements related to the use of public funds

District comments/recommendations: The school materially complies with this standard.

School comments:

#### Measure 13b

Is the school following Generally Accepted Accounting Principles (GAAP)?

##### Meets standard:

- The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to financial management and oversight expectations by an annual independent audit, including, but not limited to:
- An unqualified audit opinion
  - An audit devoid of significant findings and conditions, material weaknesses, or significant internal control weaknesses
  - An audit that does not include a going concern disclosure in the notes or an explanatory paragraph within the audit report

##### Does not meet standard:

- The school was materially out of compliance with applicable laws, rules, regulations, and/or provisions of the charter contract relating to financial management and oversight expectations by an annual independent audit, including, but not limited to:
- An qualified audit opinion
  - An audit containing significant findings or conditions, material weaknesses, or significant internal control weaknesses
  - An audit that included a going concern disclosure in the notes or an explanatory paragraph within the audit report

District comments/recommendations: The school materially complies with this standard and submitted an audit devoid of significant findings or material weaknesses.

School comments:

**Measure 13c**

Is the school complying with applicable governance requirements?

**Meets standard:**

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to governance by its board, including but not limited to:

- Board policies
- Board bylaws
- State open meetings law
- Code of ethics
- Conflicts of interest
- Board composition and/or membership rules

**Does not meet standard:**

The school was materially out of compliance with applicable laws, rules, regulations, and/or provisions of the charter contract relating to governance by its board, including, but not limited to:

- Board policies
- Board bylaws
- State open meetings law
- Code of ethics
- Conflicts of interest
- Board composition and/or membership rules

District comments/recommendations: The school materially complies with this standard.

School comments:

**Measure 13d**

Is the school holding its administration accountable?

**Meets standard:**

The school materially complies with applicable laws, rules, regulations, provisions of the charter contract, and its own internal policies and practices relating to oversight of school administration, including but not limited to:

- Board oversight of school administration that includes holding it accountable for performance expectations which may or may not be agreed to under a written performance agreement
- The board conducting an annual evaluation of the administrator's performance

**Does not meet standard:**

The school was materially out of compliance with applicable laws, rules, regulations, provisions of the charter contract, and its own internal policies and practices relating to oversight of school administration, including but not limited to:

- Board oversight of school administration that includes holding it accountable for performance expectations which may or may not be agreed to under a written performance agreement
- The board conducting an annual evaluation of the administrator's performance

District comments/recommendations: The school materially complies with this standard.

School comments:

**Measure 13e**

Is the school complying with reporting requirements?

**Meets standard:**

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to relevant reporting requirements to the district, and the Oregon Department of Education, including but not limited to:

- Accountability reporting
- Attendance and enrollment reporting
- Compliance with the charter contract and all applicable laws
- Timely submission of all deliverables
- Additional information as requested by the district

**Does not meet standard:**

The school was materially out of compliance with applicable laws, rules, regulations, and/or provisions of the charter contract relating to relevant reporting requirements to the district, and the Oregon Department of Education, including, but not limited to:

- Accountability reporting
- Attendance and enrollment reporting
- Compliance with the charter contract and all applicable laws
- Timely submission of all deliverables
- Additional information as requested by the district

District comments/recommendations: The school materially complies with this standard. Portland Arthur Academy consistently submits required deliverables on time and as requested.

School comments:

## 14. Students and Employees

### Measure 14a

Is the school protecting the rights of all students?

#### **Meets standard:**

- The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to the rights of students, including but not limited to:
- Policies and practices related to admissions, lottery, waiting lists, fair and open recruitment, and enrollment (including rights to enroll or maintain enrollment)
  - The collection and protection of student information
  - Due process protections, privacy, civil rights, and student liberties requirements, including First Amendment protections and the Establishment Clause restrictions prohibiting public schools from engaging in religious instruction
  - Conduct of discipline (discipline hearings, and suspensions and expulsion policies and practices)

#### **Does not meet standard:**

- The school was materially out of compliance with applicable laws, rules, regulations, and/or provisions of the charter contract relating to the rights of students, including, but not limited to:
- Policies and practices related to admissions, lottery, waiting lists, fair and open recruitment, and enrollment (including rights to enroll or maintain enrollment)
  - The collection and protection of student information
  - Due process protections, privacy, civil rights, and student liberties requirements, including First Amendment protections and the Establishment Clause restrictions prohibiting public schools from engaging in religious instruction
  - Conduct of discipline (discipline hearings, and suspensions and expulsion policies and practices)

District comments/recommendations: The district has no reason to believe the school has not met this standard.

School comments:

**Measure 14b**

Is the school meeting teacher and other staff credentialing requirements?

**Meets standard:**

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to state certification requirements, including any teacher credentialing requirements provided in the Every Student Succeeds Act (ESSA), charter school licensure and registry requirements, and background check and fingerprinting requirements for all staff and volunteers.

**Does not meet standard:**

The school was materially out of compliance with applicable laws, rules, regulations, and provisions of the charter contract relating to state certification requirements, including any teacher credentialing requirements provided in the Every Student Succeeds Act (ESSA), charter school licensure and registry requirements, and/or background check and fingerprinting requirements for all staff and volunteers.

District comments/recommendations: The school materially complies with this standard as evidenced through required staff reporting deliverables to the district.

School comments:

**Measure 14c**

Is the school complying with laws regarding employee rights?

**Meets standard:**

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to employment considerations, including those relating to the Family Medical Leave Act, the Americans with Disabilities Act, and employment contracts (if applicable).

**Does not meet standard:**

The school was materially out of compliance with applicable laws, rules, regulations, and provisions of the charter contract relating to employment considerations, including those relating to the Family Medical Leave Act, the Americans with Disabilities Act, and employment contracts (if applicable).

District comments/recommendations: The district has no reason to believe the school has not met this standard.

School comments:

**15. School Environment**

**Measure 15a**

Is the school complying with facilities and transportation requirements?

**Meets standard:**

- The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to the school facilities, grounds, and transportation, including, but not limited to:
  - Americans with Disabilities Act
  - Fire inspections and related records
  - Viable certificate of occupancy or other required building use authorization
  - Documentation of requisite insurance coverage
  - Student transportation

**Does not meet standard:**

- The school was materially out of compliance with applicable laws, rules, regulations, and provisions of the charter contract relating to the school facilities, grounds, and transportation, including, but not limited to:
  - Americans with Disabilities Act
  - Fire inspections and related records
  - Viable certificate of occupancy or other required building use authorization
  - Documentation of requisite insurance coverage
  - Student transportation

District comments/recommendations: The district has no reason to believe the school has not met this standard.

School comments:

**Measure 15b**

Is the school complying with health and safety requirements?

**Meets standard:**

- The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to safety and the provision of health-related services, including, but not limited to:
- Appropriate nursing services and dispensing of pharmaceuticals
  - Food service requirements
  - Healthy and Safe Schools Plan (ORS 581-022-2233)

**Does not meet standard:**

- The school was materially out of compliance with applicable laws, rules, regulations, and provisions of the charter contract relating to safety and the provision of health-related services,, including, but not limited to:
- Appropriate nursing services and dispensing of pharmaceuticals
  - Food service requirements
  - Healthy and Safe Schools Plan (ORS 581-022-2233)

District comments/recommendations: The district has no reason to believe the school has not met this standard.

School comments:

**Measure 15c**

Is the school handling information appropriately?

**Meets standard:**

- The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to the handling of information, including, but not limited to:
- Maintaining the security of and providing access to student records under the Family Educational Rights and Privacy Act (FERPA) and other applicable authorities
  - Accessing documents maintained by the school under the state's Freedom of Information law and other applicable authorities
  - Transferring of student records
  - Proper and secure maintenance of testing materials

**Does not meet standard:**

- The school was materially out of compliance with applicable laws, rules, regulations, and provisions of the charter contract relating to the handling of information, including, but not limited to:
- Maintaining the security of and providing access to student records under the Family Educational Rights and Privacy Act (FERPA) and other applicable authorities
  - Accessing documents maintained by the school under the state's Freedom of Information law and other applicable authorities
  - Transferring of student records
  - Proper and secure maintenance of testing materials

District comments/recommendations: The district has no reason to believe the school has not met this standard.

School comments:

## 16. Additional Obligations

### Measure 16

Is the school complying with all other obligations?

#### **Meets standard:**

The school materially complies with all other applicable legal, statutory, regulatory, or contractual requirements contained in the charter contract that are not otherwise explicitly stated herein, including, but not limited to requirements from the following sources:

- Revisions to state charter law
- Intervention requirements by the district
- Action items assigned by the district
- Requirements by other entities to which the charter school is accountable (e.g. ODE)

#### **Does not meet standard:**

The school was materially out of compliance with applicable legal, statutory, regulatory, or contractual requirements contained in the charter contract that are not otherwise explicitly stated herein, included, but not limited to requirement from the following sources:

- Revisions to state charter law
- Intervention requirements by the district
- Action items assigned by the district
- Requirements by other entities to which the charter school is accountable (e.g. ODE)

District comments/recommendations: The school is responsive and timely with all requests and requirements from the district.

School comments:

## 17. School goals and recommendations (organizational)

### Measure 18a

Did the school meet the organizational goals it set forth in its 2019-20 Performance Plan?

Goal set in Plan	Goal achieved? (School response)	Why or why not? (School response)
All staff members will learn all students' first names by the end of the 2 <sup>nd</sup> quarter.	Partially met.	We had two new staff members. One joined us in November, while the other joined us in January. Other staff members did learn student names by the end of the 2nd quarter.
Continue with our relationship with TransActive and building a community of support and understanding.	Yes	We continued our relationship with TransActive by having another training in January.

### Measure 18b

In school year 2019-20, did the school implement the organizational recommendations from the district in the 2018-19 annual performance report?

Recommendation from the district	Recommendation implemented? (School response)	Why or why not? (School response)
No district organizational recommendations were made in 2018-19 report; all organizational measures were met. Organizational performance indicators are derived from sources such as site visits, reports from the school, feedback from the school community, Synergy, TSPC, school handbooks and policies, and others.		

**Measure 18c**

Based on the 2019-20 school year data presented in this report, will the school add any organizational goals to its 2020-21 Performance Plan? (Copy and paste as needed for additional goals.)

**Goal added to Plan:** Continue with our relationship with TransActive and building a community of support and understanding.

Practical Strategies	Rationale	Professional Development	Assess Progress	Use of Resources

## Performance Framework Summary Rubric

**E=Exceeds standard M=Meets standard D=Does not meet standard F=Falls far below standard**

<b>ACADEMIC</b>		<b>2018-19</b>	<b>2017-18</b>	<b>2016-17</b>
1a	School meets Oregon School Rating System standards			
1b	School meets Oregon indicators of academic accountability	M		
1c	Student achievement in READING as compared to district	E	E	E
1d	Student achievement in MATH as compared to district	M	M	E
1e	Special populations achievement in READING as compared to district	E	E	E
1f	Special populations achievement in MATH as compared to district	E/M	E	E
2a	Annual academic growth in READING as compared to State Target	E	E	E
2b	Annual academic growth in MATH as compared to State Target	E	E	M
3a	Special populations growth in READING as compared to State Target	E	E	M
3b	Special populations growth in MATH as compared to State Target	E/M	E	M
5	Students with chronic or severe absenteeism as compared to district, as of 2017-18, "Regular Attenders" as compared to State Level 3 indicator	M	M	E
6	NA, for Grades 6-12 only			
7	NA, for High Schools only			
<p><b>ACADEMIC COMMENTS:</b></p> <p>The school met or exceeded all academic achievement measures in 2018-19; annual summative achievement measures were not available/not applicable due to impact of COVID-19 in 2019-20. Requirements of Distance Learning for All as defined by Oregon Department of Education Guidance were met.</p>				
<b>FINANCIALS</b>		<b>2019-20</b>	<b>2018-19</b>	<b>2017-18</b>
9a	Current ratio	M	M	M
9b	Unrestricted days cash	M	M	M
9c	Enrollment variance	M	M	M
9d	Default	M	M	M
10a	Total margin	M	M	M
10b	Debt to asset ratio	M	M	M
10c	Cash flow	M	M	M
10d	Debt service coverage ratio	D	M	D
<p><b>FINANCIAL COMMENTS:</b></p> <p>10d – Debt Service Coverage ratio is nearly met at 1.08, does not meet NACSA recommended standard, however the school carries no debt and has maintained a healthy cash balance (329 days unrestricted cash). This measure is not of current concern.</p>				

		2019-20	2018-19	2017-18
	<b>ORGANIZATIONAL</b>			
12a	School is implementing education program as defined in contract	M	M	M
12b	School is complying with applicable educational requirements	M	M	M
12c	School is protecting the rights of students with disabilities	M	M	M
12d	School is protecting the rights of English Language Learner students	M	M	M
13a	School is meeting financial reporting and compliance requirements	M	M	M
13b	School following Generally Accepted Accounting Principles (GAAP)	M	M	M
13c	School complies with applicable governance requirements	M	M	M
13d	School holds its administration accountable	M	M	M
13e	School complies with accountability reporting requirements	M	M	M
14a	School protects the rights of all students	M	M	M
14b	School is meeting teacher and other staff credentialing requirements	M	M	M
14c	School complies with laws regarding employee rights	M	M	M
15a	School complies with facilities and transportation requirements	M	M	M
15b	School complies with health and safety requirements	M	M	M
15c	School handles information appropriately	M	M	M
16	School complies with all other obligations	M	M	M
	<p><b>ORGANIZATIONAL COMMENTS:</b>  All organizational measures have met the standard in 2019-20. Portland Arthur Academy has remained consistent and reliable in both maintaining achievement standards and planning for operational sustainability.</p>			

Portland Public Schools  
Charter School Renewal  
Application  
2020-2021

# Introduction

Sponsors of charter schools in Oregon are responsible for evaluating charter school performance and determining whether or not to renew the contract of the charter school based on its compliance with the law and the contract, and its performance in three domains: academic, financial, and organizational.

The National Association of Charter School Authorizers (NACSA) recognizes that a “...strong renewal process is critical to protect charter school autonomy, student rights, and the public interest, and ensures that schools are held to high standards of academic, financial, and organizational performance”<sup>1</sup> and recommends in its *Principles & Standards for Quality Charter School Authorizing* that a formal renewal application be used as part of a fair and transparent process.

This renewal application ensures that all charter schools entering the renewal process have an equal opportunity to present data and information relevant to their request for contract renewal. It also ensures that the renewal decision is based on the renewal criteria specified in ORS 338.065 and OAR 581-026-0400, and on “a review of the public charter school’s annual performance reports, annual audit of accounts and annual site visit and review...and any other information mutually agreed upon by the public charter school governing body and the sponsor.”<sup>2</sup> The charter school’s annual Performance Framework and Report is the tool used to formalize this review.

ORS 338.065 and OAR 581-026-0400 specify that the following criteria be used when determining whether or not to renew a charter school:

Whether the charter school:

- A. Is in compliance with state and federal laws;
- B. Is in compliance with the term of the prior charter;
- C. Is meeting or working toward meeting the student performance goals and agreements specified in the charter or any other written agreements between the sponsor and the public charter school governing body;
- D. Is fiscally stable and evidence that a sound financial management system described in the proposal submitted under ORS 338.045 and incorporated into the written charter was used; and
- E. Is in compliance with any renewal criteria specified in the previous charter, if any.

Charter school renewal decisions are made in the interest of students and families. We look forward to the opportunity to engage in a meaningful discussion about educational excellence through the renewal process.

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<sup>1</sup> NACSA Core Charter School Renewal Application and Guidance

<sup>2</sup> ORS 338.065(8)(b)

# Renewal Process Stages

The renewal process is a multi-stage review of each charter school's performance over the term of the contract. The major factors impacting renewal decisions are:

- Academic performance
- Fiscal performance
- Governance effectiveness
- Leadership and instructional quality
- Compliance with the terms of the charter contract, and applicable laws and regulations
- Mission fulfillment
- Significant positive or negative trends in performance, operations, and/or governance<sup>3</sup>

**First stage: request for renewal and application** The first stage in the renewal process is the submission of the renewal application by the charter school requesting renewal. Under Oregon law, a charter school governing body must request renewal of the charter by the sponsor in writing at least 180 days before the expiration of the charter.<sup>4</sup> This application constitutes that request. Once the district receives the application, the Charter Schools Office will schedule a formal site visit, which generally consists of classroom observations, meeting with the school's director and board members, and interviews of parents, teachers, students (if appropriate), and other stakeholders.

**Second stage: hearing** Within 45 days of receiving the request for renewal (this application), the district must hold a public hearing.<sup>5</sup> The purpose of the hearing is to allow the charter school to present its case for renewal, and engage in a dialogue with the PPS Charter Schools and Alternative Programs Committee, which is composed of three members of the PPS school board. Prior to the hearing, the Charter School Committee generally has a public meeting to discuss the charter school's request for renewal and prepare for the hearing. Renewal applicants are strongly encouraged to attend this meeting. Additional information may be requested from the charter school as a result of the hearing.

**Third stage: renewal recommendation and Board vote** Based on the information gathered from the public hearing, the site visit, compliance records, and the school's academic, financial, and organizational performance during the term of the contract, staff will issue the school's Renewal Report and make a recommendation to renew or non-renew the school's charter, according to the criteria in charter law. The PPS Charter Schools and Alternative Programs Committee may meet to discuss this recommendation. The Committee will make a recommendation to the full board, and the board will vote on the renewal request. The charter school may be asked to present at the full board meeting.

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<sup>3</sup> From NACSA's Charter School Contract Renewal Policy Guide

<sup>4</sup> OAR 581-026-0400(1)

<sup>5</sup> OAR 581-026-0400(2)

# Renewal Process Timeline

Renewal Stage	Purpose	Date
Release of renewal application	Provide schools and the public with transparent expectations for renewal decision-making.	By September 1
Renewal application due	Provide an opportunity for schools to formally request renewal within statutory timelines; present evidence in support of renewal request; identify plans for new charter term.	January 2
Formal site visit	Provide district staff the opportunity to observe instruction, meet with school leadership, and interview stakeholders.	January 2 - 30
PPS Board Charter Schools and Alternative Programs Committee meeting	Prepare the Board committee and the charter school for the public hearing.	Between site visit and hearing <sup>6</sup>
Public hearing	Provide the charter school an opportunity to present evidence in support of the renewal request to the PPS Board's Charter Schools Committee; provide an opportunity for Q&A with the Committee, and for public testimony regarding the renewal request.	Within 45 days of receipt of renewal request <sup>7</sup>
PPS Board Charter Schools and Alternative Programs Committee meeting	Discuss the public hearing and any information gleaned during or after the hearing; discuss staff recommendation for renewal or nonrenewal of the charter school, recommend moving resolution to full Board.	Between public hearing and board vote. <sup>8</sup>
Board vote on charter school renewal request	PPS Board makes determination to renew or non-renew the charter school.	Within 30 days of the public hearing <sup>9</sup>
Contract negotiations	Establish the terms for the next charter contract.	Within 90 days of the Board decision to renew <sup>10</sup>

<sup>6</sup> This meeting is not required by law, and is not scheduled for every renewal. In the absence of a Committee meeting, the Charter Office will prepare a written list of suggested questions for the hearing and will provide these to both the Charter Committee and the charter school.

<sup>7</sup> The district and the charter school may negotiate an alternate renewal timeline, as per ORS 338.065(5)(g). It is common for the public hearing to be scheduled after the 45-day timeline, if both parties agree to the change.

<sup>8</sup> This meeting is not required by law, and is not scheduled for every renewal.

<sup>9</sup> The district and the charter school may negotiate an alternate renewal timeline, as per ORS 338.065(5)(g). It is common for the Board vote to be scheduled after the 30-day timeline, if both parties agree to the change.

<sup>10</sup> As per ORS 338.065(5)(e), if the new charter is not negotiated within the 90-day timeline, the expiring charter shall remain in effect until a new charter is negotiated.

# Sources of Data

The following data elements and sources will be used by the district to measure performance in the following domains:

## **Academic Performance**

The district will review annual, disaggregated data based on multiple measures of achievement, including academic achievement and growth data from standardized and internal assessments along with qualitative measures. Data over the term of the contract will be reviewed. Sources of this data will include, but will not be limited to:

- The charter school's Oregon Report Card
- The charter school's contract
- The charter school's whole school growth and performance on standardized tests in Reading and Math
- The charter school's subgroup growth and performance on standardized tests in Reading and Math
- Performance and growth data related to comparison schools, as defined by the Oregon Department of Education (where applicable)
- Performance and growth data related to the district schools
- Performance and growth data from valid internal assessments administered by the charter school<sup>11</sup>
- The school's graduation rate (where applicable)
- The school's completion rate (where applicable)
- The school's dropout rate (where applicable)
- The graduation, completion, and dropout rates of comparison schools, as defined by ODE (where applicable)
- The graduation, completion, and dropout rates of district schools
- The charter school's alignment to Common Core State Standards as evidenced by course syllabi, course descriptions, curriculum alignments, etc. (where applicable)

## **Financial Performance**

The district will review financial records of the charter school, including required quarterly financial reports and annual municipal audits. Financial viability over the term of the contract will be reviewed. Sources of these records will include, but will not be limited to:

- The charter school's contract
- The charter school's audited balance sheet and notes for the last three years
- The charter school's projected enrollment and actual enrollment
- The charter school's board-adopted budget

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<sup>11</sup> If internal assessments are used as evidence in this application, charter schools must provide the following: the name of the assessment, the methods for administering the assessment, a description of what the assessment measures, a description of how the assessment is valid and reliable, and the student data reported in this application. Attach as an exhibit.

- The charter school's audited income statements and audited cash flow statements
- Annual principal and interest obligations
- Quarterly financial statements, including budget-to-actuals, profit and loss, balance sheet

### **Organizational Performance**

The district will review compliance records, reports from site visits, annual reports, correspondence between the district and the school, records of parent calls, and other relevant information to evaluate whether or not the charter school as an organization is effectively governed and managed. Organizational performance for the term of the contract will be reviewed. Sources of this information will include, but will not be limited to:

- The charter school's contract
- Site visit observations (both formal and informal)
- Required reporting by the charter school, including the timeliness and quality of all deliverables
- The school's compliance with deliverable and reporting due dates
- Feedback from parents, students, charter school staff, and other community stakeholders
- Synergy
- The Administrators Dashboard
- The charter school's internal accountability systems
- Student enrollment forms
- The charter school's adopted board policies and bylaws
- The charter school's parent/student/staff handbooks
- TSPC records
- Assurances by the charter school that it is compliant with all applicable requirements
- Correspondence with the charter school

# Charter Renewal Application Instructions

Charter renewal applications must be submitted to the district in electronic form by 5:00 pm on January 2 of the year in which the charter contract expires. The renewal application may be emailed to Tara O'Neil, Program Director, Charter Schools ([taraoneil@pps.net](mailto:taraoneil@pps.net)) and Jenny Braden, Sr. Admin Secretary II ([jbraden@pps.net](mailto:jbraden@pps.net)). This application constitutes the required written renewal request from the charter school's board of directors, as per 338.065(5)(b).

## Format for Submissions:

- The renewal application narrative should not exceed 30 pages, excluding attachments.
- The application must include the Renewal Application Form and must be signed by both the school leader/director and the Board Chair/President.
- The application should include a Table of Contents
- The application should have standard, one-inch margins, be clearly paginated, and use at least 11-point font.
- Applicants should reference attachments clearly in the application. Any attachment should provide information that:
  - Meaningfully augments the body of evidence that the authorizer has already collected on the school's performance; or
  - Illustrates or supports plans or strategies for the next charter term that would be material to the charter contract for the renewal term.

# General Information

Name of School: [Portland Arthur Academy](#)

Name of Board Chair/President: [Bonnie Grossen](#)

Phone Number of Board Chair/President: [503-207-5602](#)

Email of Board Chair/President: [bgrossen@frontier.com](mailto:bgrossen@frontier.com)

Name and Title of Contact Person: [Stephani Walker Executive Director](#)

Mailing Address of Contact Person: [13809 SE Division St. Suite A Portland, OR 97236](#)

Phone Number of Contact Person: [503-762-6061](#)


Email of Contact Person: [swalker@arthuracademy.org](mailto:swalker@arthuracademy.org)

School's Initial Opening Date: [9/1/05](#)

Current Grades Enrolled: [Kindergarten through 5th grade](#)

Grade Levels to be Served at Full Enrollment<sup>12</sup>: [Kindergarten through 5th grade](#)


Maximum Projected Enrollment (at full capacity)<sup>13</sup>: [180](#)



[12/17/2020](#)

Signature of School Director/Principal

Date



[12/19/2020](#)

Signature of Board Chair/President

Date

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<sup>12</sup> This refers to the grade structure that has been approved by the district, rather than as an anticipated or desired future grade structure.

<sup>13</sup> This refers to the maximum student enrollment that has been approved by the district, rather than an anticipated or desired future student enrollment.

# Executive Summary

1. Provide the enrollment and demographic information for the current school year in the table below. Fill in only the white fields. Report percentages where indicated.

Current Year Enrollment and Demographic Information														
<b>Total Enrollment by Grade</b>														
K	1	2	3	4	5	6	7	8	9	10	11	12	Total	
28	30	31	31	28	23								171	
<b>Number of Students on Waiting List by Grade</b>														
K	1	2	3	4	5	6	7	8	9	10	11	12	Total	
124	27	20	12	9	7									
<b>Gender by Percentage</b>									Female		52%	Male		48%
<b>Ethnicity/Race by Percentage</b>														
Asian		Black/ African American		Hispanic/ Latino		American Indian/ Alaskan Native		Pacific Islander		White		Multi- Racial		
15.20%		8.20%		6.40%		0%		0%		55.50%		14.70%		
<b>Special Populations by Percentage</b>														
Students with Disabilities		English Language Learners			Homeless Students			Eligible for Free and Reduced Meals (by Direct Certification)			TAG			
8.20%		9.69%			0.00%			29%			.58%			

2. Provide a brief description of the school, including an overview of the mission and vision, educational program, community and local partnerships, and leadership and governance. (No more than one page.)

**Overview and Instructional Method**

Portland Arthur Academy is one of six Arthur Academy schools in the state of Oregon. Our schools specialize in a unique instructional model that is a way of teaching that defines our charter school option called Direct Instruction (DI). In our DI programs, general objectives have been broken down into very small teaching progressions. All activities and examples for each lesson are very carefully

analyzed and follow a sequence that can be easily learned and incorporated into more complex areas of higher levels of applications. What is learned is continually used and applied, with less need for review. The activities are presented in very precise, interactive ways so that lessons are easier for students to understand. DI lessons allow for active participation from the students in order to maintain their interest and attention. Rapid pacing and choral group response punctuated by individual turns characterize the delivery of a DI lesson. Students progress from directed and guided activities to increasingly more independent work. Over time, they become proud of what they know and can do and confident in their ability to learn. The steps in DI have been developed from extensive field testing with hundreds of children over thirty years. No other program used today has been as extensively researched and developed.

Along with our DI programs (which are used in the subjects of reading, writing, spelling, language and math) we also offer social studies, science, challenge work, physical education, technology and music.

The Arthur Academy schools provide a solid foundation of knowledge and skills for all students.

### **Mission**

“Every single student, regardless of ethnicity, parental income, learning difference, culture, or native language, will become a fluent reader and will master the academic and intellectual skills necessary to succeed at the next level of schooling.” Implied in this mission is the desire to prevent failure in the early grades. Yet, simply preventing failure is not enough. We want all children to excel as much as they are capable. We know that this can only happen within a context of excellent programs, skillful teaching and within a caring and understanding environment. The leadership of Arthur Academy has the experience and know-how to meet these goals.

### **Board and Leadership**

Mastery Learning Institute - Arthur Academy - The administrative headquarters of Mastery Learning Institute are located at 13809 SE Division St. Suite A Portland, OR 97236

### **Portland Arthur Academy School Principal**

- Tara Miller, [tmiller@arthuracademy.org](mailto:tmiller@arthuracademy.org)

### **Arthur Academy Central Office**

- Executive Director: Stephani Walker, [swalker@arthuracademy.org](mailto:swalker@arthuracademy.org)
- Director of Operations, Finance and HR: Jill Domine, [jdomine@arthuracademy.org](mailto:jdomine@arthuracademy.org)
- Bookkeeper: Heather Lund, [hlund@arthuracademy.org](mailto:hlund@arthuracademy.org)

### **Current Arthur Academy School Board Members**

- Dr. Bonnie Grossen, [bgrossen@frontier.com](mailto:bgrossen@frontier.com)
- Charles Arthur, [carthur@teleport.com](mailto:carthur@teleport.com)
- Robert Snee, [bsnee@integra.net](mailto:bsnee@integra.net)
- Jerry Silbert, [jsilb24034@aol.com](mailto:jsilb24034@aol.com)
- Gary Davis, [gdavis@nifdi.org](mailto:gdavis@nifdi.org)
- Teresa Schantin, [schantinteresa@gmail.com](mailto:schantinteresa@gmail.com)

# Record of Performance

This section provides charter schools with an opportunity to supplement or augment the performance record. Schools do not need to include Oregon Report Card data, as it is already on file. Schools should use the sources of data specified on pages 5-6 in this application as a guide for their responses and submit only evidence of performance related to the renewal criteria in ORS 338.065.

Responses may include, but are not limited to:

- Information about interim assessments or progress reports
- Evidence of performance on school- or mission-specific goals
- Evidence of implementation of district recommendations or plans of action
- Improvements undertaken at the school along with evidence of progress for any areas in which the school has not previously met or is not currently meeting the performance standard

Responses should not include anecdotal information or evidence that is not relevant to the school's academic, financial, and organizational performance and the school's performance expectations as defined by Oregon charter law and the charter contract.

Responses in this section should total no more than 20 pages.

Renewal recommendations will be based on all evidence of school performance in the record.

## A. Academic Performance

Use this form to provide a narrative response to all questions below. If providing evidence in an appendix, clearly reference the appendix name/number in your response.

1. In brief, describe whether or not the school has met its academic performance expectations over the term of the contract.

Portland Arthur Academy has met its academic performance expectations over the term of the contract.

2. Using data from the “Sources of Data” section of this application, describe the trends in performance<sup>14</sup> over the term of the contract in the following categories:

- a. Student performance in Reading by grade

3rd Grade- The 3rd grade ELA scores have continued to stay above the district.

4th Grade- The 4th grade ELA scores have continued to stay above the district.

5th Grade- The 5th grade ELA scores have continued to stay above the district.

- b. Student performance in Reading by race/ethnicity

PAA has met academic performance expectations for our Historically Underserved groups in ELA. We received a score of “Exceeds” on our Annual Performance Framework and Report over the last three years.

- c. Student performance in Reading by special population (ESL, SpEd, FRL, TAG)

PAA has met academic performance expectations for our special populations groups in ELA. We received a score of “Exceeds” on our Annual Performance Framework and Report over the last three years.

- d. Student performance in Math by grade

3rd Grade- Over the years, math has proven to be a bit of a challenge in 3rd grade due to a curriculum alignment issue. Our math curriculum teaches many of the standards that are heavily tested on OSAS, at the end of the math program, which is after our students take the OSAS. As students progress into 4th and 5th grade, they perform much better on the OSAS. A highlight of our 3rd grade math scores came in the 18/19 school year when our average scale score increased by thirty points from the previous year to beat the state average.

4th Grade- The 4th grade math scores have continued to stay above the district.

5th Grade- The 5th grade math scores have continued to stay above the district.

- e. Student performance in Math by race/ethnicity

PAA has met academic performance expectations for our Historically Underserved groups in math. We received a score of “Exceeds” on our Annual Performance Framework and Report over the last three years.

- f. Student performance in Math by special population (EL, SpEd, FRL, TAG)

PAA has met academic performance expectations for our special population groups in math. We received a score of “Exceeds” on our Annual Performance Framework and Report over the last three years.

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<sup>14</sup> Trends in performance include growth and negative growth.

Due to our small school size, we have a small number of students in each subgroup. Some of the data is based on a 3-year average to include large enough samples to report.

If applicable:

G. Percentage of students graduating within four years of entering high school by race and special population **N/A**

H. Percentage of students graduating within five years of entering high school by race and special population **N/A**

3. Describe the major academic goals of the school over the term of the contract. Explain how these have been met/not met.

**The annual Academic Goals created by PAA in conjunction with the AA School Board are listed below (we measure “mastery” at 90% or higher accuracy on mastery tests):**

1. In the **2nd quarter Mastery Report** all Arthur Academy classes will demonstrate at least 80% mastery in all DI subjects. We pulled data from the 2014/2015 school year through the 2019/2020 school year.
  - a. 2014/2015: We met our mastery goal in all four subjects (Reading 92%, Math 91%, Language/Writing 95% and Spelling 89%).
  - b. 2015/2016: We met our mastery goal in all four subjects (Reading 88%, Math 85%, Language/Writing 90% and Spelling 89%).
  - c. 2016/2017: We met our mastery goal in all four subjects (Reading 96%, Math 93%, Language/Writing 91% and Spelling 93%).
  - d. 2017/2018: We met our mastery goal in all four subjects (Reading 94%, Math 91%, Language/Writing 95% and Spelling 96%).
  - e. 2018/2019: We met our mastery goal in all four subjects (Reading 93%, Math 94%, Language/Writing 95% and Spelling 95%).
  - f. 2019/2020: We met our mastery goal in all four subjects (Reading 95%, Math 93%, Language/Writing 96% and Spelling 84%).
2. In the **4th quarter Mastery Report** all Arthur Academy classes will demonstrate at least 80% mastery in all DI subjects. We pulled data from the 2014/2015 school year through the 2019/2020 school year.
  - a. 2014/2015: We met our mastery goal in all four subjects (Reading 88%, Math 81%, Language/Writing 93% and Spelling 86%).
  - b. 2015/2016: We met our mastery goal in all four subjects (Reading 88%, Math 81%, Language/Writing 93% and Spelling 86%).
  - c. 2016/2017: We met our mastery goal in all four subjects (Reading 95%, Math 93%, Language/Writing 92% and Spelling 93%).
  - d. 2017/2018: We met our mastery goal in all four subjects (Reading 94%, Math 90%, Language/Writing 94% and Spelling 92%).
  - e. 2018/2019: We met our mastery goal in all four subjects (Reading 94%, Math 92%, Language/Writing 97% and Spelling 94%).
  - f. 2019/2020: We do not have data for this time since we transitioned to Distance Learning in the spring of 2020.

PAA has met 100% of our annual academic goals.

4. Describe the major academic recommendations from the district over the term of the contract. Explain how these have/have not been implemented.

Each year of our contract with the Portland Public School District, we've submitted reports/plans stating our academic performance from the previous year. We have received very few academic recommendations from the district over the term of the contract.

District comments/recommendations: (2014/2015 data) 5% of Historically Underserved students at Arthur Academy met or exceeded the benchmark in Math, while 26% of Historically Underserved students in the district in grades 3-5 did. Recommendation: While there is no rating for this measure for 2014-15, Arthur Academy should revise and/or enhance its 2015-16 Performance Plan to include a specific goal for improving the performance of Historically Underserved students in Math. This goal should be a SMART goal, and should include a professional development component.

School's Response: Historically Underserved students will receive extra practice in math on a weekly basis. This session will include skills they were weak on, as well as lessons to supplement and support what is taught in class. In addition, we have also enhanced our students' typing lessons to ensure that the technology is not getting in the way of demonstrating their skills. A SMART goal will be added in this area. We would like to note that 76.5% of our Historically Underserved students met or exceeded in ELA.

District comments/recommendations: (2014/2015 data) 12.5% of English Learners at Arthur Academy met or exceeded the standard in Math, while 22% of English Learners in the district in grades 3-5 did.

School Comments: Of the 83 students that participated in the state assessment three of them are identified as English Learners. These three students are also included as part of Historically Underserved students. In addition to this, they are now all in their second year at our school. Since starting school in the 2014/2015 school year we have been very pleased with their progress to meet grade level standards.

5. Provide evidence of outcomes related to any mission-specific academic goals and measures established in the charter contract or in the school's own performance plan.

Teaching our Direct Instruction programs to fidelity requires our teachers to instruct their classes to mastery. Mastery in this instance is defined as a student scoring 90% or better on a given mastery test or independent daily work. Teachers fill out *Lesson Progress Charts* each week that report on how students perform on daily work and on mastery tests. All of this data is analyzed by the teacher, the intervention specialist and the principal. When students do not perform at this standard, we will provide remediation lessons until they've reached mastery.

6. Provide any other academic performance-related evidence, supplemental data, or contextual information that may not be captured in the district's records or in other information provided in this application. All information should be aligned to the renewal criteria stated in ORS 338.065. Any appendices should be clearly referenced. Do not restate information that has already been provided.

All of our students take the easyCBM assessment in the fall and spring of each year. Prior to using easyCBM, we used the MAP assessment tool. We started using easyCBM during the 15/16 school year and administered it to only the K-1st students. It was administered to all students during the 16/17 school year. Every year since beginning the easyCBM assessment, our students have increased their fall to spring scores. PAA averages 80% of the entire school within the 40th-99th percentile in math and reading. During the 19/20 school year, we were unable to take the spring assessments due to the pandemic.

## B. Financial Performance

Use this form to provide a narrative response to all questions below. If providing evidence in an appendix, clearly reference the appendix name/number in your response.

1. In brief, describe whether or not the school has met its financial performance expectations over the term of the contract.

PAA's budget and accounting formats comply with the requirements of the uniform budget and accounting systems adopted by the Oregon Department of Education. PAA continues to successfully meet its financial goals each academic year. This includes remaining current with all accounts payable, payroll, taxes and employee benefits.

PAA actively adjusts spending and budgeting each year to make certain that it completes each fiscal year with a positive cash balance. PAA submits the annual financial audit, annual budget and quarterly financial reports to the school district in a timely manner according to the contract.

2. Using the data from the "Sources of Data" section of this application, describe the trends in performance over the term of the contract in the following categories:

- a. Near-term measures (assets to liabilities, unrestricted days cash, default)

Assets to liabilities ratio has remained favorable. Surplus is sufficient for 150-160 days at current costs.

	<b>2019-2020</b>	<b>2018-2019</b>	<b>2017-2018</b>
Total Current Assets	1,120,003	1,045,813	919,631
Total Current Liabilities	117,504	158,328	109,762
<b>Current Liquidity/Solvency Ratio</b>	<b>9.5</b>	<b>6.6</b>	<b>8.4</b>

- b. Sustainability measures (total margin, debts to assets, cash flow, financial reporting and compliance, municipal audits)

Financial reporting is adhered to per our contract

Annual financial (municipal) audit is conducted and submitted in a timely manner.

Net income/margin has remained positive.

	<b>2019-2020</b>	<b>2018-2019</b>	<b>2017-2018</b>
Total Income	1,343,062	1,254,973	1,248,308
Total Expense	1,231,278	1,181,261	1,075,371
Net Income	111,784	73,712	172,937
Net Margin	9%	6%	16%

- c. Long-term measures (financial planning, budgeting, fundraising, grants)

School remains debt-free.

Future projections determine that the school will begin a "spend-down" of their surplus after the 2020-2021 fiscal year due to increased salaries, PERS and other payroll costs.

3. Describe the major financial goals of the charter school over the term of the contract.  
Explain how these have been met/not met.  
Major financial goals have been to remain financially stable, find a more suitable location and to increase staff salaries. PAA is financially stable and has been able to increase staff salaries.
4. Describe the major financial recommendations by the district over the term of the contract.  
Describe how these have/have not been implemented.  
There have been no major financial recommendations made by the district.
5. Provide any other financial performance-related evidence, supplemental data, or contextual information that may not be captured in the district's records or in other information provided in this application. All information should be aligned to the renewal criteria stated in ORS 338.065. Any appendices should be clearly referenced. Do not restate information that has already been provided.

## C. Organizational Performance

*Use this form to provide a narrative response to all questions below. If providing evidence in an appendix, clearly reference the appendix name/number in your response.*

1. In brief, describe whether or not the school has met its organizational performance expectations over the term of the contract.  
PAA submits all reports (financial and academic) in a timely manner. Our organization keeps all policies and handbooks up-to-date and makes them accessible to the public. We employ highly trained and qualified teachers, all certified per TSPC.
2. Using data from the “Sources of Data” section of this application, describe the trends in performance over the term of the contract in the following categories:
  - a. Implementation of the terms of the educational program as defined in the charter contract: PAA teaches all Oregon State Standards using our Direct Instruction curriculum for reading, writing/language, math and spelling. Our other supplemental programs are used to teach Oregon State Standards in social studies, science, health, PE and music. Over the term of the contract, we have always taught using the above stated curriculum and have had to add some “Connections” lessons for math and reading, especially over the last five years. These lessons are also aligned to Oregon Stats Standards and are created by our classroom teachers in conjunction with the principal.
  - b. Compliance with applicable education requirements: PAA teaches all Common Core State Standards (as stated above) and adheres to instructional hour requirements. While planning our school calendar and schedule, we ensure students receive well over the state instructional time requirements.
  - c. Protecting the rights of all students, including students with disabilities and English Language Learners: PAA protects these rights by ensuring our students receive appropriate instructional time to serve their needs.
  - d. Compliance with applicable governance requirements: PAA complies with all applicable governance requirements (as reported in the annual deliverables to PPS).
  - e. Holding the administration accountable: The PAA principal is evaluated annually by the Arthur Academy Executive Director, but is given feedback, twice per month, about performance. This performance is measured by the Executive Director’s observations and by analyzing student data to look for mastery results and trends that show student performance is at mastery or is improving. The Executive Director also refers to Parent Satisfaction Surveys and considers observations and discussions with teachers/staff as a valid resource for evaluating the principal.
  - f. Compliance with reporting requirements: PAA complies with these requirements for all reports (as reported in the annual deliverables to PPS).
  - g. Compliance with teacher and other staff credentialing requirements: All PAA teachers are certified through TSPC.
  - h. Compliance with facilities and transportation requirements: In compliance (as reported in the annual deliverables to PPS).

- i. Compliance with health and safety requirements: PAA has a commitment to safety. We have a comprehensive health and safety plan for our organization. PAA has been routinely checked for fire and food health safety and has been in compliance accordingly (as reported in the annual deliverables to PPS).
  - j. Handling information appropriately: In compliance (as reported in the annual deliverables to PPS).
  - k. Compliance with all other obligations: In compliance (as reported in the annual deliverables to PPS).
3. Describe the major organizational goals of the organization during the term of the contract. Describe how these have been met/not met.

**The annual Organization Goals created by PAA in conjunction with the AA School Board are listed below:**

2017-2018 The Arthur Academy Organization will earn a rating of satisfied or highly satisfied from at least 90% of our staff according to a spring School Climate survey.

**Results:** 93%. We met our goal.

2018-2019 The Arthur Academy Organization will earn a rating of satisfied or highly satisfied from at least 90% of our staff according to a spring School Climate survey.

**Results:** 94%. We met our goal.

2019-2020 The Arthur Academy Organization will earn a rating of satisfied or highly satisfied from at least 90% of our staff according to a spring School Climate survey.

**Results:** 96% We met our goal.

4. Describe the major organizational recommendations from the district over the term of the contract. Describe how these have/have not been implemented.

**The district recommended we remove two questions from our enrollment application.**

1. District Recommendation: While SB 820 allows charter schools to prioritize historically underserved students in their lotteries, charter schools should exercise caution when requiring specific information on the application form. Arthur currently asks if a student has an IEP on its application.

School's Response: This is no longer part of our application.

2. District Recommendation: The lottery application asks parents to state whether or not their student has ever been retained a grade. While this information would be important after admission, it is not appropriate for a lottery application, and could be perceived as a potential barrier to enrollment. Arthur should remove this question from the application.

School's Response: This is no longer part of our application.

Both Of the application recommendations have been met.

The District recommended we add student achievement goals in the administrator's performance expectations and annual evaluation.

1. District Recommendations: In the 2015-16 Performance Framework and Report, the District recommended the charter school board include student achievement goals in

the administrator's performance expectations and annual evaluation, if they were not already included.

School's Response: Student Achievement goals are incorporated in the administrator's performance expectations and evaluation. The evaluation objectives regarding achievement goals pertain to both state test achievement and in-program assessment achievement.

The recommendation has been met.

5. Provide any other organizational performance-related evidence, supplemental data, or contextual information that may not be captured in the district's records or in other information provided in this application. All information should be aligned to the renewal criteria stated in ORS 338.065. Any appendices should be clearly referenced. Do not restate information that has already been provided.

PAA conducts an annual Parent Survey every April. The results consistently show that Parent Satisfaction has been ranked favorably over the term of the charter. Families have chosen the options of "Highly Satisfied" or "Satisfied" between 96%-100% of the time over the term of the contract.

## Plans for the next charter term

This section provides the charter school with an opportunity to discuss plans for the next charter term. Charter schools should use this section to outline a deliberate plan for sustaining success, addressing areas requiring improvement, and ensuring the ongoing viability of the organization.

**Charter schools should also use this section as an opportunity to identify all material modifications, changes or additions that the school may be seeking during the next charter term.** Examples of this include, but are not limited to: adding or removing grades, raising the enrollment cap, substantively changing the instructional model or the mission, operating in more than one location, etc. In the case of such requests, the district reserves the right to request additional information so that it may sufficiently assess the impact and planning for such changes. Even if the proposed changes would occur several years into the next charter term, the charter school should outline them here, as any substantial change will be part of the next contract. **Any proposed substantive modifications must be stated in this section and are subject to approval by the district consistent with policy and state law.**

**Note:** Responses to this section will not be the basis for the district's decision for renewal or non-renewal. Consistent with NACSA's *Principles and Standards for Quality Charter School Authorizing*, the district will make its decision based on the school's record of performance, as opposed to the promise of future performance or improvement. All renewal decisions will be aligned with the criteria for renewal stated in ORS 338. If the school's renewal application is approved, the plans presented below will inform relevant sections of the charter contract for the new term.

*Instructions: Use this section to describe the charter school's academic, financial, and organizational plans for the next charter term. As stated above, describe any proposed material modifications that the charter school will seek in the next term. This section should not exceed 10 pages.*

Arthur Academy is an academically successful and fiscally stable organization. We plan to continue to teach our students using the Mastery Learning/Direct Instruction model. We will work to incorporate more technology into the classroom and continue to expand on our Social and Emotional curriculum. Over the last five years, we have worked hard to reach out to populations of students who have historically been underserved during our application process and will continue to do so.

Portland Arthur Academy asks for the following modifications to be made to our contract:

- PAA is requesting a ten year contract.
- PAA is requesting the percentage of SSF Funds passed through increase from 80% to 90%. We believe this increase is necessary for the following reasons:
  - Students deserve to be funded in an equitable manner.
  - We are unable to sufficiently increase salaries and benefits with our current funding structure.

- A vast disparity exists between PAA's PERS employer contribution percentage of 23.72% compared to PPS at 3.36%. Due to the substantial PERS expenses, we are unable to sustain current salary levels making teacher retention difficult.
- We will need to obtain another location soon due to the condition of our current location. This will be extremely difficult with our current funding structure because we are solely responsible for the funds to purchase or lease and the development involved.
- Lack of sufficient funding leaves us feeling vulnerable with less financial certainty from year-to-year. This impacts staff and student morale, hinders our growth mindset and affects our ability to adequately support students, staff and our community.
- As a reminder, we do not receive bonds, levies, property tax monies, federal funds, transportation funds, etc. We are expected to function solely on 80% of the general fund. (Portland Arthur Academy recognizes, and appreciates, that PPS passes through a portion of other funding such as Equity Funds.)



# Board of Education Informational Report

## MEMORANDUM

**Date:** February 2, 2021

**To:** Members of the Board of Education, Charter Schools and Alternative Programs Committee

**From:** Korinna Wolfe, Area Senior Director, Multiple Pathways to Graduation

**Subject:** Opal Charter School Renewal Request

Opal Charter School is a k-5 charter school in SW Portland, housed in the Portland Children’s Museum building, enrolling 88-90 students. The school’s instructional program is guided by the work of early childhood educators in Reggio Emilia, Italy, neuroscience research, and constructivist practices. The Opal School, through its association with the Museum Center for Learning, operates as a research lab and professional development hub for educators nationwide, who take part in Opal’s Summer Symposium and Visitation Days during the school year.

Opal opened in 2001, and is in its 20<sup>th</sup> year of operation. It successfully applied for charter renewal in 2006 and 2011. The school is currently operating under a five-to-ten-year “flexible” agreement which has been extended annually to reach the statutory 10<sup>th</sup> year limit, and will terminate on June 30, 2021.

Opal Charter School has formally submitted an Application for Renewal of its charter with the District. Per ORS 338.065(4)(c), this renewal term “shall be for a minimum of five years but may not exceed 10 years.” Opal has requested a ten-year renewal of its charter.

Highlights of renewal term include:

- Opal Charter School’s research has been presented to an estimated 10,000 educators worldwide since 2001, touching the lives of perhaps one million students from Portland to Dubai.
- Opal has partnered with Woodlawn School to expand use of the arts as languages for thinking and learning, with Vestal School to deepen teachers’ understanding of and alignment with their newly adopted social justice mission, and with KairosPDX to collaborate on professional development.
- Opal Charter School has worked with Teaching Preschool Partners (Beaverton, Gladstone, and Parkrose) to expand inquiry-based approaches in PreK-5.
- Students regularly meet or exceed District averages and State targets on state assessments.

Considerations:

- Opal Charter School does not have an economy of scale to operate independently from the Portland Children’s Museum at current enrollment.
- Student population at Opal reflects lower representation of students of historically underserved races/ethnicities and economically disadvantaged students than the District as a whole.
- Due to small student numbers, it is difficult to disaggregate achievement data for all student

groups with statistical significance.

Requests from Opal for consideration in Renewal Contract:

- Opal has requested an increase in enrollment capacity from 92 students to 250 students to allow the school flexibility in future searches for facilities to expand from 4 classrooms to 6 or 10 classrooms and gain some benefit from economy of scale (see justification for request on pg. 23 of Renewal Application). Proposed increase in enrollment would occur gradually over a number of years within the 10-year contract term.

Charter schools, as schools of choice, continue to work to attract a student population that is reflective of the District's population. Opal's enrollment reflects significantly less racial diversity than District averages. About 2% of its students are English Learners (compared to 11% District k-5), 5.6% are Economically Disadvantaged (compared to 32.1% District k-5), 16.9% are Historically Underserved Races/Ethnicities (compared to 31.9% District k-5), and 80% are White (compared to 56.9% District k-5). Opal has posted translated enrollment information as well as made hard copy brochures available in all District supported languages to broaden its outreach to English Language Learners. Opal's continued work is to broaden its outreach to historically underserved communities resulting in a more diverse student population.

In academic, financial, and organizational performance, the Charter Schools Office found no areas of concern regarding statutory compliance. The unique relationship Opal Charter School shares as a component program of Portland Children's Museum complicates both organizational and financial analysis; for example the Museum's Board is the governing body for Opal School, which is only one part of the Board's responsibilities. Additionally, many typically "central office" functions are managed by Museum staff, for which Opal Charter School is charged administrative fees by Portland Children's Museum. Clearly defining the organizational and financial relationship between the entities has been ongoing work during the current and prior charter terms.

The PPS Charter Schools Office submits the attached 2019-20 Oregon School Profile and 2019-20 Performance Framework and Report for Opal in review of its academic performance, fiscal management, organizational stability, adherence with all applicable state laws, and compliance with all terms of the charter contract. In addition, Opal's Charter Renewal Application is attached.

Attachments:

- o 2019-20 Oregon School Profile
- o Opal School 2019-20 Performance Framework and Report
- o Opal School Charter Renewal Application

## STUDENTS WE SERVE^

### 89 Student Enrollment

^Student enrollment as of October 1, 2019

## DEMOGRAPHICS

### American Indian/Alaska Native

Students: **0%**

Teachers: **0%**

### Asian

Students: **1%**

Teachers: **0%**

### Black/African American

Students: **1%**

Teachers: **0%**

### Hispanic/Latino

Students: **10%**

Teachers: **10%**

### Multiracial

Students: **8%**

Teachers: **0%**

### Native Hawaiian/Pacific Islander

Students: **0%**

Teachers: **0%**

### White

Students: **80%**

Teachers: **90%**

## INTRODUCTION

The At-A-Glance School and District profiles tell a story about Oregon's schools and districts. This year's profiles do not include statewide assessments data, class size data, or attendance data as a result of the necessary statewide school closures and the implementation of Distance Learning for All. The profiles present all available data not impacted by the state's response to COVID-19.

## REQUIRED VACCINATIONS

**78%**

## OUR STAFF (ROUNDED FTE)

**5** Teachers

**4** Educational assistants

**0** Counselors/Psychologists

**75%** Average Teacher retention rate

**70%** of licensed teachers with more than 3 years of experience

**Yes:** Same principal for the last 3 years?

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Portland Public Schools  
Annual Performance Framework and Report

Opal Charter School  
2019-20 School Year

Submitted by:

Tara O'Neil  
Program Director, Charter Schools



## **Introduction**

Charter schools in Oregon are defined in statute as “...a legitimate avenue for parents, educators and community members to take responsible risks to create new, innovative and more flexible ways of educating children within the public school system. The Legislative Assembly seeks to create an atmosphere in Oregon’s public school system where research and development of new learning opportunities are actively pursued.” (ORS 338.015)

The charter schools sponsored by Portland Public Schools provide educational options for students and families as well as diversity of professional opportunities for school employees. While the district provides oversight and support to its sponsored charters, each charter school is an independent, nonprofit organization that has autonomy over its mission, strategic planning, budget, hiring, policies, and the development and implementation of its educational program.

Portland Public Schools is responsible for maintaining high standards for its sponsored charter schools, and for ensuring that charter schools are compliant with all applicable laws, that their academic programs are successful, they are financially viable, and their organizations are effective and responsibly managed. The district balances oversight with an understanding of the independence and autonomy afforded public charter schools by law.

In so doing, PPS has established the following performance framework, which is informed by best practice from the Core Performance Framework and Guidance developed by the National Association of Charter School Authorizers (NACSA). This performance framework is designed to measure each charter school’s academic, financial, and organizational performance, and to “...guide practice, assess progress, and inform decision-making over the course of the charter term and at renewal.”<sup>1</sup>

Because each charter school’s story and perspective on its own performance is critical to a balanced evaluation process, each measure includes space for narrative explanation and/or further description from both the district and the charter school. It is our hope and goal that PPS and the charter school will fully engage in the process of program evaluation each year and at the renewal period, and that this process contributes to the continuous improvement of each charter school and the PPS Charter Schools Office.

Tara O’Neil  
Program Director, Charter Schools  
Portland Public Schools

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<sup>1</sup> From NACSA’s Core Performance Framework and Guidance.

## **Academic performance: data elements and sources**

The purpose of the Academic Performance section of the Annual Performance Framework and Report is to evaluate whether or not the charter school's educational program is showing success with its students.

Many of the indicators for this section are adopted from the National Association of Charter School Authorizers' "Core Performance Framework and Guidance", while the performance targets and ratings are aligned with the targets and ratings in the Oregon Report Card.

***Note: The Oregon Department of Education (ODE) will not assign summative, overall ratings to schools on the redesigned Oregon Report Card beginning in the 2017-18 school year. Instead schools are rated on up to 6 (for k-8) or 9 (for HS) separate indicators.***

The following data elements and sources are used to complete the Academic Performance analysis:

- The charter school's Oregon Report Card
- The charter school's State Assessment results
- The charter school's contract
- The district's Oregon Report Card
- The district's State Assessment results
- Performance and growth information for comparison schools, as defined by the Oregon Department of Education
- The Administrator's Dashboard

Additionally for high schools only:

- The school's graduation rate
- The district's graduation rate
- The school's completion rate
- The district's completion rate
- The school's freshmen on track rate
- The district's freshmen on track rate
- The graduation, completion, and dropout rates of comparison schools, if applicable, as defined by ODE

Additionally for grades 6-12 only:

- The charter school's alignment to Common Core State Standards as evidenced by course syllabi, course descriptions, curriculum alignments, etc.

***Note on Statewide Report Cards for 2019-20:*** The Oregon Department of Education (ODE) School and District profiles do not include statewide assessments data, class size data, or attendance data as a result of the necessary COVID-19 related statewide school closures and the implementation of Distance Learning for All. The profiles present all available data not impacted by the state's response to COVID-19. **As a result, there is no comparative academic performance data to report for charter schools in the 2019-20 school year.** Page 14 begins sections on Financial and Organizational performance for the 2019-20 school year.

*The 3-year Trend Performance Summary chart at the end of this document will not include summary data from 2019-20 in the Academic section, and instead will retain the data from the most recent 3 years of available academic performance data. The Financial and Organizational sections will include summary data from the 2019-20 school year.*

# Academic Performance

## 1. Oregon School Rating System

<b>Measure 1a</b> Is the school meeting acceptable standards according to the Oregon State school rating system?
<b>Exceeds standard:</b> <input type="checkbox"/> School received the highest rating from the state accountability system
<b>Meets standard:</b> <input type="checkbox"/> School received a passing rating according to the state accountability system
<b>Does not meet standard:</b> <input type="checkbox"/> School did not receive passing rating according to the state accountability system
<b>Falls far below standard:</b> <input type="checkbox"/> School identified for intervention or considered failing by the state accountability system
District comments/recommendations: <b>N/A, the current version of the Oregon Report Card no longer gives single ratings to schools</b>
School comments:

<b>Measure 1b</b> Is the school meeting state designation expectations as set forth by the state and federal accountability system?
<b>Exceeds standard:</b> <input type="checkbox"/> School was identified as meeting long term academic accountability indicators as defined by Oregon's ESEA Plan
<b>Meets standard:</b> <input checked="" type="checkbox"/> School was identified as meeting interim targets of academic accountability indicators as defined by Oregon's ESEA Plan
<b>Does not meet standard:</b> <input type="checkbox"/> School was identified as falling below the interim target but not in the lowest 10% of schools as defined by Oregon's ESEA Plan
<b>Falls far below standard:</b> <input type="checkbox"/> School was identified as in the lowest 10% of schools as defined by Oregon's ESEA Plan
District comments/recommendations: The school has not been identified for Targeted (TSI) or Comprehensive (CSI) Supports.
School comments:

**Measure 1c**

How are **All Students Total (3-5)** and **by Grade Level** achieving on state assessments in English Language Arts (ELA) compared to students in the district?

**E=Exceeds standard:** School's average achievement rate exceeds the average district performance of students in the same grades by at least 10%

**M=Meets standard:** School's average achievement rate meets or exceeds the average district performance of students in the same grades by up to 10% (or within variance of one student)

**D=Does not meet standard:** School's average achievement rate is less than the average district performance of students in the same grades by 1-10%

**F= Falls far below standard:** School's average achievement rate is less than the average district performance of students in the same grades by more than 10%

Data: **NA**

*The Oregon Department of Education (ODE) School and District profiles do not include statewide assessments data, class size data, or attendance data as a result of the necessary COVID-19 related statewide school closures and the implementation of Distance Learning for All.*

School comments:

**Measure 1d**

How are **All Students Total (3-5)** and **by Grade Level** achieving on state assessments in MATHEMATICS compared to students in the district?

**E=Exceeds standard:** School's average achievement rate exceeds the average district performance of students in the same grades by at least 10%

**M=Meets standard:** School's average achievement rate meets or exceeds the average district performance of students in the same grades by up to 10% (or within variance of one student)

**D=Does not meet standard:** School's average achievement rate is less than the average district performance of students in the same grades by 1-10%

**F= Falls far below standard:** School's average achievement rate is less than the average district performance of students in the same grades by more than 10%

Data: **NA**

*The Oregon Department of Education (ODE) School and District profiles do not include statewide assessments data, class size data, or attendance data as a result of the necessary COVID-19 related statewide school closures and the implementation of Distance Learning for All.*

School comments:

**Measure 1e**

How are **Students of Special Populations** achieving on state assessments in English Language Arts (ELA) compared to the **Students of Special Populations** in the district?

**E=Exceeds standard:** School's average subgroup achievement rate exceeds the average district performance of students in the same subgroup in the same grades by at least 10%

**M=Meets standard:** School's average subgroup achievement rate meets or exceeds the average district performance of students in the same subgroup in the same grades by up to 10% (or within variance of one student)

**D=Does not meet standard:** School's average subgroup achievement rate is less than the average district performance of students in the same subgroup in the same grades by 1-10%

**F= Falls far below standard:** School's average subgroup achievement rate is less than the average district performance of students in the same subgroup in the same grades by more than 10%

Data: **NA**

*The Oregon Department of Education (ODE) School and District profiles do not include statewide assessments data, class size data, or attendance data as a result of the necessary COVID-19 related statewide school closures and the implementation of Distance Learning for All.*

School comments:

**Measure 1f**

How are **Students of Special Populations** achieving on state assessments in MATHEMATICS compared to the **Students of Special Populations** in the district?

**E=Exceeds standard:** School's average subgroup achievement rate exceeds the average district performance of students in the same subgroup in the same grades by at least 10%

**M=Meets standard:** School's average subgroup achievement rate meets or exceeds the average district performance of students in the same subgroup in the same grades by up to 10% (or within variance of one student)

**D=Does not meet standard:** School's average subgroup achievement rate is less than the average district performance of students in the same subgroup in the same grades by 1-10%

**F= Falls far below standard:** School's average subgroup achievement rate is less than the average district performance of students in the same subgroup in the same grades by more than 10%

Data: **NA**

*The Oregon Department of Education (ODE) School and District profiles do not include statewide assessments data, class size data, or attendance data as a result of the necessary COVID-19 related statewide school closures and the implementation of Distance Learning for All.*

School comments:

## 2. Student Academic Growth

### Measure 2a

Are students making expected annual academic growth in English Language Arts (ELA) compared to their peers? (Combined Median Growth Percentile)

#### **E=Exceeds standard:**

Combined median growth percentile of 55 or more

#### **M=Meets standard:**

Combined median growth percentile of between 45 and 54.9 (or within variance of one student)

#### **D=Does not meet standard:**

Combined median growth percentile of between 40 and 44.9

#### **F=Falls far below standard:**

Combined median growth percentile of less than 40

Data: **NA**

*The Oregon Department of Education (ODE) School and District profiles do not include statewide assessments data, class size data, or attendance data as a result of the necessary COVID-19 related statewide school closures and the implementation of Distance Learning for All.*

School comments:

### Measure 2b

Are students making expected annual academic growth in MATH compared to their peers? (Combined Median Growth Percentile)

#### **E=Exceeds standard:**

Combined median growth percentile of 55 or more

#### **M=Meets standard:**

Combined median growth percentile of between 45 and 54.9 (or within variance of one student)

#### **D=Does not meet standard:**

Combined median growth percentile of between 40 and 44.9

#### **F=Falls far below standard:**

Combined median growth percentile of less than 40

Data: **NA**

*The Oregon Department of Education (ODE) School and District profiles do not include statewide assessments data, class size data, or attendance data as a result of the necessary COVID-19 related statewide school closures and the implementation of Distance Learning for All.*

School comments:

### 3. Subgroup Growth

<b>Measure 3a</b> Is the school increasing academic performance over time in English Language Arts for <b>Students of Special Populations?</b> (Combined Median Growth Percentile)
<b>E=Exceeds standard:</b> Combined median growth percentile of 55 or more
<b>M=Meets standard:</b> Combined median growth percentile of between 45 and 54.9 (or within variance of one student)
<b>D=Does not meet standard:</b> Combined median growth percentile of between 40 and 44.9
<b>F=Falls far below standard:</b> Combined median growth percentile of less than 40
Data: <b>NA</b> <i>The Oregon Department of Education (ODE) School and District profiles do not include statewide assessments data, class size data, or attendance data as a result of the necessary COVID-19 related statewide school closures and the implementation of Distance Learning for All.</i>
School comments:

<b>Measure 3b</b> Is the school increasing academic performance over time in MATH for <b>Students of Special Populations?</b> (Combined Median Growth Percentile)
<b>E=Exceeds standard:</b> Combined median growth percentile of 55 or more
<b>M=Meets standard:</b> Combined median growth percentile of between 45 and 54.9 (or within variance of one student)
<b>D=Does not meet standard:</b> Combined median growth percentile of between 40 and 44.9
<b>F=Falls far below standard:</b> Combined median growth percentile of less than 40
Data: <b>NA</b> <i>The Oregon Department of Education (ODE) School and District profiles do not include statewide assessments data, class size data, or attendance data as a result of the necessary COVID-19 related statewide school closures and the implementation of Distance Learning for All.</i>
School comments:

#### 4. Local Performance Assessments

<b>Measure 4</b> Describe your school's Local Performance Assessments in the fields below.			
<b>What Local Performance Assessment are you using?</b>	<b>To what grades are you administering the Local Performance Assessment?</b>	<b>What subjects are you assessing through the Local Performance Assessment?</b>	<b>How are you documenting your administration of the Local Performance Assessment?</b>
Reading Developmental Continuum	K-5	Reading	Individual student assessment in file
Development Reading Assessment (DRA)	K-5	Reading	Individual student assessment in file
Spelling Inventory	K-5	Spelling	Individual student assessment in file
Writing Developmental Continuum	K-5	Writing	Individual student assessment in file
Work Sample	3-5	Writing	Individual student assessment in file
Work Sample	3-5	Speaking	Individual student assessment in file
Mathematical Landscape	K-5	Math	Individual student assessment in file <ul style="list-style-type: none"> <li>• Big ideas</li> <li>• Models</li> <li>• Strategies</li> </ul>
Work Sample, math poster	3-5	Math	Individual student assessment in file <ul style="list-style-type: none"> <li>• Computation</li> <li>• Tools for thinking</li> <li>• Big ideas</li> </ul>
Work Sample	3-5	Science	Individual student assessment in file

**Measure 4 (Continued)**

Describe your school's Local Performance Assessments in the fields below.

<b>What Local Performance Assessment are you using?</b>	<b>To what grades are you administering the Local Performance Assessment?</b>	<b>What subjects are you assessing through the Local Performance Assessment?</b>	<b>How are you documenting your administration of the Local Performance Assessment?</b>
Opal School Goals and Expectations	K-5	<ul style="list-style-type: none"> <li>• Discover, cultivate and express the joy and wonder of learning</li> <li>• Develop an understanding and curiosity about multiple points of view</li> <li>• Have value and empathy for experiences and perspectives different from one's own</li> <li>• Collaborate with others to construct ideas and create new knowledge</li> <li>• Develop an understanding of our interdependent relationship with the natural world</li> <li>• Take action as mindful citizens who care about contributing to a future that acknowledges living systems as an integrated whole</li> <li>• Develop strategies that contribute to the quality of the community by having a keen sense of place, identity and belonging while respecting the rights and identities of others</li> <li>• Read the world: explore ideas and relationships; make connections between known and unknown information</li> <li>• Use the written and spoken word with increasing proficiency to communicate ideas, relationships and understandings</li> <li>• Uncover and communicate observations, questions, theories and ideas through skillful and imaginative uses of the languages of the arts and sciences, including mathematics</li> <li>• Develop an appreciation of and capacity for accuracy, elegant design and efficiency</li> </ul>	<p>Opal School Goals and Expectations are assessed continually through anecdotal notes, analyzing student work samples, narrative, transcription of dialogue, documentation panels, etc.</p> <p>This growth is shared at our Fall parent-teacher conferences and Spring student-led conferences.</p>
District comments/recommendations:			

## 5. Student Attendance

### Measure 5

What percentage of students at the charter school are identified as Regular Attenders (attending more than 90% of their enrolled days)?

#### **E=Exceeds standard:**

- School's percentage of Regular Attenders meets or exceeds the long term goal of 93% as set by the Oregon Department of Education

#### **M=Meets standard:**

- School's percentage of Regular Attenders meets or exceeds the Level 3 indicator by grade level as set by the Oregon Department of Education (K-5, 85%; 6-8, 83%; 9-10, 78%)

#### **D=Does not meet standard:**

- School's percentage of Regular Attenders does not meet the Level 3 indicator by grade level but is not below the 10<sup>th</sup> percentile of performance for the grade level group

#### **F= Falls far below standard:**

- School's percentage of Regular Attenders is below the 10<sup>th</sup> percentile of performance for the grade level group

Data: **NA**

*The Oregon Department of Education (ODE) School and District profiles do not include statewide assessments data, class size data, or attendance data as a result of the necessary COVID-19 related statewide school closures and the implementation of Distance Learning for All.*

School comments:

(Measures 6 and 7 omitted, apply to middle and high schools only)

## 8. School goals and recommendations (academic)

### Measure 8a

Did the school meet the academic goals it set forth in its 2019-20 Performance Plan?

Goal set in Plan	Goal achieved? (School response)	How or why not? (School response) Include any professional development implemented to support this goal.
Each student's academic growth in math will meet the goal set for that student during Fall formative assessments.	NA	Implementation of Distance Learning for All
Demonstrate growth toward social justice standards.	Yes	Based on student work through COVID closure
Increase the number of students who attend school regularly from 89% to 90%.	No	

### Measure 8b

In school year 2019-20, did the school implement the academic recommendations from the district in the 2018-19 annual performance report (if any)?

Recommendation from the district	Recommendation implemented? (School response)	How or why not? (School response) Include any professional development implemented to support this goal.
In the 2018-19 Report, the District recommended that Opal School make an effort to increase its participation rate to increase the statistical validity of testing data.	NA	State testing was cancelled for 2019-20
District recommended Opal School investigate effectiveness of its k-3 mathematics instruction, as the 3 <sup>rd</sup> grade test data is the only level showing results lower than District average.	Yes	Opal School increased instruction time for mathematics, obtained additional (newly published) contexts for mathematics aligned with our approach, and invested in professional development for teachers.

**Measure 8c**

Based on the 2019-20 school year data presented in this report, will the school add any academic goals to its 2020-21 Performance Plan? (Copy and paste as needed for additional goals.)

<b>Goal added to Plan:</b>				
Instructional Strategies	Rationale	Professional Development	Assess Progress	Use of Resources
N/A				
N/A				

## **Financial Performance: data elements and sources**

The purpose of the Financial Performance section of the Annual Performance Framework and Report is to evaluate whether or not the charter school is financially viable.

Many of the indicators, performance targets, and ratings for this section are adopted from the National Association of Charter School Authorizers' "Core Performance Framework and Guidance".

The following data elements and sources are used to complete the Financial Performance analysis:

- The charter school's contract
- The charter school's audited balance sheet and notes for the last three years
- The charter school's projected enrollment and actual enrollment
- The charter school's board-adopted budget
- The charter school's audited income statement and audited cash flow statement
- Annual principal and interest obligations
- Quarterly financial statements, including budget-to-actuals, profit and loss, balance sheet

# Financial Performance

## 9. Near-Term Measures

<b>Measure 9a</b> Current ratio: Current assets divided by current liabilities
<b>Meets standard:</b> <input checked="" type="checkbox"/> Current ratio is greater than or equal to 1.1
<b>Does not meet standard:</b> <input type="checkbox"/> Current ratio is between .9 and 1.0 or equals 1.0
<b>Falls far below standard:</b> <input type="checkbox"/> Current ratio is less than or equal to .9
District comments/recommendations: Current ratio is 3.37, meets standard
School comments:

<b>Measure 9b</b> Unrestricted days cash: Unrestricted cash divided by (total expenses minus depreciation expense) / 365)
<b>Meets standard:</b> <input checked="" type="checkbox"/> 60 days cash -OR- <input type="checkbox"/> Between 30 and 60 days cash and one-year trend is positive
<b>Does not meet standard:</b> <input type="checkbox"/> Between 15 and 30 days cash -OR- <input type="checkbox"/> Between 30 and 60 days cash and one-year trend is negative
<b>Falls far below standard:</b> <input type="checkbox"/> Fewer than 15 days cash
District comments/recommendations: School has 150.3 days unrestricted cash, meets standard
School comments:

**Measure 9c**

Enrollment variance: actual enrollment divided by enrollment projection in most recent charter school board-approved budget

**Meets standard:**

Enrollment variance equals or exceeds 95% in the most recent year

**Does not meet standard:**

Enrollment variance is between 85-95% in the most recent year

**Falls far below standard:**

Enrollment variance is less than 85% in the most recent year

District comments/recommendations:

Enrollment variance is 1.01, meets standard

School comments:

**Measure 9d**

Default

**Meets standard:**

School is not in default of loan covenant(s) and/or is not delinquent with debt service payments

**Falls far below standard:**

School is in default of loan covenant(s) and/or is delinquent with debt service payments

District comments/recommendations:

Not in default, meets standard

School comments:

## 10. Sustainability Measures

### Measure 10a

Total Margin: Net income divided by total revenue

Aggregated total margin: Total 3-year net income divided by total 3-year revenues

#### **Meets standard:**

- Aggregated 3-year total margin is positive and the most recent year total margin is positive
- OR-
- Aggregated 3-year total margin is greater than -1.5%, the trend is positive for the last 2 years, and the most recent year total margin is positive

#### **Does not meet standard:**

- Aggregated 3-year total margin is greater than -1.5%, but trend does not “meet standard” (above)

#### **Falls far below standard:**

- Aggregated three-year total margin is less than or equal to -1.5%
- OR-
- The most recent year total margin is less than -10%

District comments/recommendations:

Aggregated 3-year total margin is -1.54%, total margin is -9.95%; does not meet standard.

The aggregated 3-yr total margin as well as the most recent year total margin do not meet standard, and there have been three years of losses (with pension effects removed). Opal School has a unique financial arrangement with the Portland Children’s Museum, without which the school could not support operations with current enrollment. **District recommends** Opal’s Board should continue to monitor the school’s cash flow and budget, as well as review the school’s quarterly financial reports and enrollment trends.

School comments:

Portland Children’s Museum received a federal Payroll Protection Program loan in 2019-20, and a portion of this loan is forgivable under certain conditions. Some payroll expenses of the organization that are charged as overhead expenses to Opal Charter School met the conditions for forgiveness, but this amount was not reflected in 2019-20 as a government grant (income), because the PPP forgiveness was not approved until Fall of 2020. If the government grant had been accrued in 2019-20, Opal Charter School’s financial statements would show a break-even result.

**Measure 10b**

Debt to asset ratio: Total liabilities divided by total assets

**Meets standard:**

Debt-to-asset ratio is less than 0.9

**Does not meet standard:**

Debt-to-asset ratio is between 0.9 and 1.0

**Falls far below standard:**

Debt-to-asset ratio is greater than 1.0

District comments/recommendations:

Debt-to-asset ratio is 0.11, meets standard

School comments:

**Measure 10c**

Cash flow:  
Multi-year cash flow = Year 3 total cash - Year 1 total cash  
One-year cash flow = Year 2 total cash - Year 1 total cash

**Meets standard:**

- Multi-year cumulative cash flow is positive and cash flow is positive each year
- OR-
- Multi-year cumulative cash flow is positive, cash flow is positive in one of two years, and cash flow in the most recent year is positive

**Does not meet standard:**

- Multi-year cumulative cash flow is positive, but trend does not “meet standard” (above)

**Falls far below standard:**

- Multi-year cumulative cash flow is negative

District comments/recommendations:

Multi-year cash flow is \$81,099 (meets standard) and one-year cash flow is -\$80,122 (does not meet standard); overall does not meet standard. Cash and General Fund Ending Fund Balance are still healthy. **District recommends** Opal’s Board should continue to monitor the school’s cash flow and budget, as well as review the school’s quarterly financial reports and enrollment trends.

School comments:

As a program of the Portland Children’s Museum, Opal School continues efforts to budget and control the use and expense of centralize services and core mission support.

**Measure 10d**

Debt service coverage ratio: (net income + depreciation + interest expense) / (annual principal, interest, and lease payments)

**Meets standard:**

- Debt service coverage ratio is equal to or exceeds 1.1

**Does not meet standard:**

- Debt service coverage ratio is less than 1.1

District comments/recommendations:

Debt service coverage ratio is -0.84, does not meet NACSA recommended standard, however the school carries no debt and has maintained a healthy cash balance (150 days unrestricted days cash). In addition, the school’s facility is effectively donated so there are few, if any, costs associated with occupancy. This measure is not of current concern, though bears watching if agreements regarding facility use change.

School comments:

The debt service coverage ratio is used to compare cashflow available to meet interest and principal payments. Opal School’s lease payments are an in kind calculation, and do not depend on cashflow. Opal School does not carry debt.

## 11. School goals and recommendations (financial)

### Measure 11a

Did the school meet the financial goals it set forth in its 2019-20 Performance Plan?

Goal set in Plan	Goal achieved? (School response)	Why or why not? (School response)
Work with Portland Children's Museum to develop budget agreement and transparency for services and costs charged to Opal School	No	COVID

### Measure 11b

In school year 2019-20, did the school implement the financial recommendations from the district in the 2018-19 annual performance report (if any)?

Recommendation from the district	Recommendation implemented? (School response)	Why or why not? (School response)
No financial recommendation was made by District in 2018-19 report, there were no financial concerns. (Financial performance measures from 2018-19 can be found on p. 34, 3-yr Trend Summary.)		

### Measure 11c

Based on the 2019-20 school year data presented in this report, will the school add any financial goals to its 2020-21 Performance Plan? (Copy and paste as needed for additional goals.)

Goal added to Plan:				
Practical Strategies	Rationale	Professional Development	Assess Progress	Use of Resources

## **Organizational Performance: data elements and sources**

The purpose of the Organizational Performance section of the Annual Report is to evaluate whether or not the charter school as an organization is effectively governed and well run.

Many of the indicators, performance targets, and ratings for this section are adopted from the National Association of Charter School Authorizers' "Core Performance Framework and Guidance".

The following data elements and sources are used to complete the Organizational Performance analysis:

- Site visit observations (both formal and informal)
- The charter school's contract
- Required reporting by the charter school, including all deliverables
- The school's adherence to deliverable and reporting due dates
- Feedback from parents, students, charter school staff, and other community stakeholders
- Synergy or other student information system
- The Administrators Dashboard
- The charter school's internal accountability systems
- Student enrollment forms
- The charter school's adopted board policies
- The charter school's parent/student/staff handbooks
- TSPC
- Assurances by the charter school that it is compliant with all applicable requirements

# Organizational Performance

## 12. Education Program

<b>Measure 12a</b> Is the school implementing the material terms of the education program as defined in the current charter contract?
<b>Meets standard:</b> <input checked="" type="checkbox"/> The school implemented the material terms of the education program in all material aspects and the education program in operation reflects the material terms as defined in the charter contract, or the school has gained approval for a modification to the material terms.
<b>Does not meet standard:</b> <input type="checkbox"/> The school failed to implement the material terms of the education program in all material aspects and the education program in operation does not reflect the material terms as defined in the charter contract, or the schools implemented a modification to the material terms without approval and/or a mutually agreeable amendment to the contract.
District comments/recommendations: The school materially complies with this standard.
School comments:

<b>Measure 12b</b> Is the school complying with applicable education requirements?
<b>Meets standard:</b> <input checked="" type="checkbox"/> The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to education requirements, including but not limited to: <ul style="list-style-type: none"><li>• Instructional days and/or minutes requirements</li><li>• Graduation and promotion requirements</li><li>• Content standards, including Common Core State Standards</li><li>• The administration of state assessments</li><li>• Implementation of mandated programming as a result of state or federal funding</li></ul>
<b>Does not meet standard:</b> <input type="checkbox"/> The school was materially out of compliance with applicable laws, rules, regulations, and/or provisions of the charter contract relating to education requirements, including, but not limited to: <ul style="list-style-type: none"><li>• Instructional days and/or minutes requirements</li><li>• Graduation and promotion requirements</li><li>• Content standards, including Common Core State Standards</li><li>• The administration of state assessments</li><li>• Implementation of mandated programming as a result of state or federal funding</li></ul>
District comments/recommendations: The school materially complies with this standard.
School comments:

**Measure 12c**

Is the school protecting the rights of students with disabilities?

**Meets standard:**

Consistent with the school's status as a school in a district LEA, the school materially complies with applicable laws, rules, regulations, and provisions of the charter contract (including the Individuals with Disabilities Education Act, Section 504 of the Rehabilitation Act of 1973, and the Americans with Disabilities Act) relating to the treatment of students with identified disabilities and those suspected of having a disability, including, but not limited to:

- Equitable access and opportunity to enroll
- Identification and referral
- Appropriate involvement with development and implementation of Individualized Education Plans, and appropriate development of Section 504 plans
- Operational compliance, including appropriate inclusion in the school's academic program, assessments, and extracurricular activities.
- Discipline, including due process protections, manifestation determinations, and behavioral intervention plans
- Access to the school's facility and program to students in a lawful manner and consistent with students' IEPs or 504 plans

**Does not meet standard:**

Consistent with the school's status as a school in a district LEA, the school was materially out of compliance with one or more applicable laws, rules, regulations, and provisions of the charter contract (including the Individuals with Disabilities Education Act, Section 504 of the Rehabilitation Act of 1973, and the Americans with Disabilities Act) relating to the treatment of students with identified disabilities and those suspected of having a disability, including, but not limited to:

- Equitable access and opportunity to enroll
- Identification and referral
- Appropriate involvement with development and implementation of Individualized Education Plans, and appropriate development of Section 504 plans
- Operational compliance, including appropriate inclusion in the school's academic program, assessments, and extracurricular activities.
- Discipline, including due process protections, manifestation determinations, and behavioral intervention plans
- Access to the school's facility and program to students in a lawful manner and consistent with students' IEPs or 504 plans

District comments/recommendations: The school materially complies with this standard.

School comments:

**Measure 12d**

Is the school protecting the rights of English Language Learner students?

**Meets standard:**

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract (including Title III of the Elementary and Secondary Education Act, and US Department of Education authorities) relating to requirements of English Language Learners, including, but not limited to:

- Equitable access and opportunity to enroll
- Development and implementation of required plans related to the service of ELL students
- Proper steps for identification of students in need of ELL services
- Appropriate and equitable delivery of services to identified students
- Appropriate accommodations on assessments
- Exiting of students from ELL services
- Ongoing monitoring of exited students

**Does not meet standard:**

The school failed to comply with one or more applicable laws, rules, regulations, and/or provisions of the charter contract (including Title III of the Elementary and Secondary Education Act, and US Department of Education authorities) relating to requirements of English Language Learners, including, but not limited to:

- Equitable access and opportunity to enroll
- Development and implementation of required plans related to the service of ELL students
- Proper steps for identification of students in need of ELL services
- Appropriate and equitable delivery of services to identified students
- Appropriate accommodations on assessments
- Exiting of students from ELL services
- Ongoing monitoring of exited students

District comments/recommendations: The school materially complies with this standard.

School comments:

### 13. Governance and Reporting

<b>Measure 13a</b> Is the school meeting financial reporting and compliance requirements?
<p><b>Meets standard:</b></p> <p><input checked="" type="checkbox"/> The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to financial reporting requirements, including, but not limited to:</p> <ul style="list-style-type: none"> <li>● Complete and timely submission of financial reports, including: annual budget, revised budgets (when applicable), quarterly financial reports, and annual municipal audit</li> <li>● All other reporting requirements related to the use of public funds</li> </ul>
<p><b>Does not meet standard:</b></p> <p><input type="checkbox"/> The school was materially out of compliance with applicable laws, rules, regulations, and/or provisions of the charter contract relating to financial reporting requirements, including, but not limited to:</p> <ul style="list-style-type: none"> <li>● Complete and timely submission of financial reports, including: annual budget, revised budgets (when applicable), quarterly financial reports, and annual municipal audit</li> <li>● All other reporting requirements related to the use of public funds</li> </ul>
District comments/recommendations: The school materially complies with this standard.
School comments:

<b>Measure 13b</b> Is the school following Generally Accepted Accounting Principles (GAAP)?
<p><b>Meets standard:</b></p> <p><input checked="" type="checkbox"/> The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to financial management and oversight expectations by an annual independent audit, including, but not limited to:</p> <ul style="list-style-type: none"> <li>● An unqualified audit opinion</li> <li>● An audit devoid of significant findings and conditions, material weaknesses, or significant internal control weaknesses</li> <li>● An audit that does not include a going concern disclosure in the notes or an explanatory paragraph within the audit report</li> </ul>
<p><b>Does not meet standard:</b></p> <p><input type="checkbox"/> The school was materially out of compliance with applicable laws, rules, regulations, and/or provisions of the charter contract relating to financial management and oversight expectations by an annual independent audit, including, but not limited to:</p> <ul style="list-style-type: none"> <li>● An qualified audit opinion</li> <li>● An audit containing significant findings or conditions, material weaknesses, or significant internal control weaknesses</li> <li>● An audit that included a going concern disclosure in the notes or an explanatory paragraph within the audit report</li> </ul>
District comments/recommendations: The school materially complies with this standard and submitted an audit with no material or significant findings.
School comments:

**Measure 13c**

Is the school complying with applicable governance requirements?

**Meets standard:**

- The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to governance by its board, including but not limited to:
  - Board policies
  - Board bylaws
  - State open meetings law
  - Code of ethics
  - Conflicts of interest
  - Board composition and/or membership rules

**Does not meet standard:**

- The school was materially out of compliance with applicable laws, rules, regulations, and/or provisions of the charter contract relating to governance by its board, including, but not limited to:
  - Board policies
  - Board bylaws
  - State open meetings law
  - Code of ethics
  - Conflicts of interest
  - Board composition and/or membership rules

District comments/recommendations: The school materially complies with this standard.

School comments:

**Measure 13d**

Is the school holding its administration accountable?

**Meets standard:**

- The school materially complies with applicable laws, rules, regulations, provisions of the charter contract, and its own internal policies and practices relating to oversight of school administration, including but not limited to:
  - Board oversight of school administration that includes holding it accountable for performance expectations which may or may not be agreed to under a written performance agreement
  - The board conducting an annual evaluation of the administrator's performance

**Does not meet standard:**

- The school was materially out of compliance with applicable laws, rules, regulations, provisions of the charter contract, and its own internal policies and practices relating to oversight of school administration, including but not limited to:
  - Board oversight of school administration that includes holding it accountable for performance expectations which may or may not be agreed to under a written performance agreement
  - The board conducting an annual evaluation of the administrator's performance

District comments/recommendations: The school materially complies with this standard.

School comments:

**Measure 13e**

Is the school complying with reporting requirements?

**Meets standard:**

- The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to relevant reporting requirements to the district, and the Oregon Department of Education, including but not limited to:
- Accountability reporting
  - Attendance and enrollment reporting
  - Compliance with the charter contract and all applicable laws
  - Timely submission of all deliverables
  - Additional information as requested by the district

**Does not meet standard:**

- The school was materially out of compliance with applicable laws, rules, regulations, and/or provisions of the charter contract relating to relevant reporting requirements to the district, and the Oregon Department of Education, including, but not limited to:
- Accountability reporting
  - Attendance and enrollment reporting
  - Compliance with the charter contract and all applicable laws
  - Timely submission of all deliverables
  - Additional information as requested by the district

District comments/recommendations: The school materially complies with this standard. Opal School consistently submits required deliverables on time and as requested.

School comments:

## 14. Students and Employees

### Measure 14a

Is the school protecting the rights of all students?

#### **Meets standard:**

- The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to the rights of students, including but not limited to:
- Policies and practices related to admissions, lottery, waiting lists, fair and open recruitment, and enrollment (including rights to enroll or maintain enrollment)
  - The collection and protection of student information
  - Due process protections, privacy, civil rights, and student liberties requirements, including First Amendment protections and the Establishment Clause restrictions prohibiting public schools from engaging in religious instruction
  - Conduct of discipline (discipline hearings, and suspensions and expulsion policies and practices)

#### **Does not meet standard:**

- The school was materially out of compliance with applicable laws, rules, regulations, and/or provisions of the charter contract relating to the rights of students, including, but not limited to:
- Policies and practices related to admissions, lottery, waiting lists, fair and open recruitment, and enrollment (including rights to enroll or maintain enrollment)
  - The collection and protection of student information
  - Due process protections, privacy, civil rights, and student liberties requirements, including First Amendment protections and the Establishment Clause restrictions prohibiting public schools from engaging in religious instruction
  - Conduct of discipline (discipline hearings, and suspensions and expulsion policies and practices)

District comments/recommendations: The district has no reason to believe the school has not met this standard.

School comments:

**Measure 14b**

Is the school meeting teacher and other staff credentialing requirements?

**Meets standard:**

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to state certification requirements, including any teacher credentialing requirements provided in the Every Student Succeeds Act (ESSA), charter school licensure and registry requirements, and background check and fingerprinting requirements for all staff and volunteers.

**Does not meet standard:**

The school was materially out of compliance with applicable laws, rules, regulations, and provisions of the charter contract relating to state certification requirements, including any teacher credentialing requirements provided in the Every Student Succeeds Act (ESSA), charter school licensure and registry requirements, and/or background check and fingerprinting requirements for all staff and volunteers.

District comments/recommendations: The school materially complies with this standard as evidenced through required staff reporting deliverables to the district.

School comments:

**Measure 14c**

Is the school complying with laws regarding employee rights?

**Meets standard:**

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to employment considerations, including those relating to the Family Medical Leave Act, the Americans with Disabilities Act, and employment contracts (if applicable).

**Does not meet standard:**

The school was materially out of compliance with applicable laws, rules, regulations, and provisions of the charter contract relating to employment considerations, including those relating to the Family Medical Leave Act, the Americans with Disabilities Act, and employment contracts (if applicable).

District comments/recommendations: The district has no reason to believe the school has not met this standard.

School comments:

## 15. School Environment

### Measure 15a

Is the school complying with facilities and transportation requirements?

#### **Meets standard:**

- The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to the school facilities, grounds, and transportation, including, but not limited to:
- Americans with Disabilities Act
  - Fire inspections and related records
  - Viable certificate of occupancy or other required building use authorization
  - Documentation of requisite insurance coverage
  - Student transportation

#### **Does not meet standard:**

- The school was materially out of compliance with applicable laws, rules, regulations, and provisions of the charter contract relating to the school facilities, grounds, and transportation, including, but not limited to:
- Americans with Disabilities Act
  - Fire inspections and related records
  - Viable certificate of occupancy or other required building use authorization
  - Documentation of requisite insurance coverage
  - Student transportation

District comments/recommendations: The district has no reason to believe the school has not met this standard.

School comments:

**Measure 15b**

Is the school complying with health and safety requirements?

**Meets standard:**

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to safety and the provision of health-related services, including, but not limited to:

- Appropriate nursing services and dispensing of pharmaceuticals
- Food service requirements
- Healthy and Safe Schools Plan (ORS 581-022-2233)

**Does not meet standard:**

The school was materially out of compliance with applicable laws, rules, regulations, and provisions of the charter contract relating to safety and the provision of health-related services,, including, but not limited to:

- Appropriate nursing services and dispensing of pharmaceuticals
- Food service requirements
- Healthy and Safe Schools Plan (ORS 581-022-2233)

District comments/recommendations: The district has no reason to believe the school has not met this standard.

School comments:

**Measure 15c**

Is the school handling information appropriately?

**Meets standard:**

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to the handling of information, including, but not limited to:

- Maintaining the security of and providing access to student records under the Family Educational Rights and Privacy Act (FERPA) and other applicable authorities
- Accessing documents maintained by the school under the state's Freedom of Information law and other applicable authorities
- Transferring of student records
- Proper and secure maintenance of testing materials

**Does not meet standard:**

The school was materially out of compliance with applicable laws, rules, regulations, and provisions of the charter contract relating to the handling of information, including, but not limited to:

- Maintaining the security of and providing access to student records under the Family Educational Rights and Privacy Act (FERPA) and other applicable authorities
- Accessing documents maintained by the school under the state's Freedom of Information law and other applicable authorities
- Transferring of student records
- Proper and secure maintenance of testing materials

District comments/recommendations: The district has no reason to believe the school has not met this standard.

School comments:

## 16. Additional Obligations

### Measure 16

Is the school complying with all other obligations?

#### Meets standard:

The school materially complies with all other applicable legal, statutory, regulatory, or contractual requirements contained in the charter contract that are not otherwise explicitly stated herein, including, but not limited to requirements from the following sources:

- Revisions to state charter law
- Intervention requirements by the district
- Action items assigned by the district
- Requirements by other entities to which the charter school is accountable (e.g. ODE)

#### Does not meet standard:

The school was materially out of compliance with applicable legal, statutory, regulatory, or contractual requirements contained in the charter contract that are not otherwise explicitly stated herein, included, but not limited to requirement from the following sources:

- Revisions to state charter law
- Intervention requirements by the district
- Action items assigned by the district
- Requirements by other entities to which the charter school is accountable (e.g. ODE)

District comments/recommendations: The school is responsive and timely with all requests and requirements from the district.

School comments:

## 17. School goals and recommendations (organizational)

### Measure 18a

Did the school meet the organizational goals it set forth in its 2019-20 Performance Plan?

Goal set in Plan	Goal achieved? (School response)	Why or why not? (School response)
Streamlined and efficient organization structure and roles as defined by Portland Children's Museum and Opal School	No	COVID

**Measure 18b**

In school year 2019-20, did the school implement the organizational recommendations from the district in the 2018-17 annual performance report?

<b>Recommendation from the district</b>	<b>Recommendation implemented? (School response)</b>	<b>Why or why not? (School response)</b>
<p>No district organizational recommendations were made in 2018-19 report; all organizational measures were met. Organizational performance indicators are derived from sources such as site visits, reports from the school, feedback from the school community, Synergy, TSPC, school handbooks and policies, and others.</p>		

**Measure 18c**

Based on the 2019-20 school year data presented in this report, will the school add any organizational goals to its 2020-21 Performance Plan? (Copy and paste as needed for additional goals.)

<b>Goal added to Plan:</b>				
Practical Strategies	Rationale	Professional Development	Assess Progress	Use of Resources

## Opal Charter School 3-year Trend Performance Summary

### Performance Framework Summary Rubric

**E=Exceeds standard M=Meets standard D=Does not meet standard F=Falls far below standard**

		2018 -19	2017 -18	2016 -17
<b>ACADEMIC</b>				
1a	School meets Oregon School Rating System standards			
1b	School meets Oregon indicators of academic accountability	M		
1c	Student achievement in READING as compared to district	M	E	E
1d	Student achievement in MATH as compared to district	M	M	M
1e	Special populations achievement in READING as compared to district	M	E	E
1f	Special populations achievement in MATH as compared to district	D	M	M
2a	Annual academic growth in READING as compared to State Target	E	E	M
2b	Annual academic growth in MATH as compared to State Target	M	E	M
3a	Special populations growth in READING as compared to State Target	*	*	*
3b	Special populations growth in MATH as compared to State Target	*	*	*
5	Students with chronic or severe absenteeism as compared to district; as of 2017-18, "Regular Attenders" as compared to State Level 3 indicator	M	M	D
6	NA, for Grades 6-12 only			
7	NA, for High Schools only			
<p>*Not reported, did not meet minimum n-size to receive rating</p> <p>2019-20 COMMENTS: Annual summative achievement measures were not available/not applicable due to impact of COVID-19 in 2019-20. Requirements of Distance Learning for All as defined by Oregon Department of Education Guidance were met.</p> <p>2018-19 ACADEMIC COMMENTS: 1f - The only group included in Special Populations rating is Students with Disabilities, based on a combined 3-year average due to small sample size. While the school did not meet District average, it did meet the State MIP target for Students with Disabilities. The school met or exceeded all other applicable academic achievement measures in 2018-19.</p>				
<b>FINANCIALS</b>				
		2019 -20	2018 -19	2017 -18
9a	Current ratio	M	M	M
9b	Unrestricted days cash	M	M	M
9c	Enrollment variance	M	M	M
9d	Default	M	M	M
10a	Total margin	D	D	D
10b	Debt to asset ratio	M	M	M
10c	Cash flow	D	M	D

10d	Debt service coverage ratio	D	D	D
	<p><b>FINANCIAL COMMENTS:</b>  10a, 10c, 10d - Total Margin, One-year Cash Flow, and Debt Service Coverage do not meet the standard set by NACSA, which could be an indicator of risk for long term sustainability. However the school consistently maintains a healthy cash balance (210 days unrestricted cash) and does not carry debt. In addition, Opal's facility is effectively donated so there are no lease payments. Opal's Board should continue to monitor the school's cash flow and budget closely.</p> <p>All other financial measures have met the standard.</p>			
	<b>ORGANIZATIONAL</b>	<b>2019 -20</b>	<b>2018 -19</b>	<b>2017 -18</b>
12a	School is implementing education program as defined in contract	M	M	M
12b	School is complying with applicable educational requirements	M	M	M
12c	School is protecting the rights of students with disabilities	M	M	M
12d	School is protecting the rights of English Language Learner students	M	M	M
13a	School is meeting financial reporting and compliance requirements	M	M	M
13b	School following Generally Accepted Accounting Principles (GAAP)	M	M	M
13c	School complies with applicable governance requirements	M	M	M
13d	School holds its administration accountable	M	M	M
13e	School complies with accountability reporting requirements	M	M	M
14a	School protects the rights of all students	M	M	M
14b	School is meeting teacher and other staff credentialing requirements	M	M	M
14c	School complies with laws regarding employee rights	M	M	M
15a	School complies with facilities and transportation requirements	M	M	M
15b	School complies with health and safety requirements	M	M	M
15c	School handles information appropriately	M	M	M
16	School complies with all other obligations	M	M	M
	<p><b>ORGANIZATIONAL COMMENTS:</b>  All organizational measures have met the standard in 2019-20. Opal has remained consistent and reliable in timely reporting, compliance with applicable requirements, and planning for operational sustainability within the limits of being a component program of Portland Children's Museum.</p>			

Opal Charter School  
Portland Children's Museum  
4015 SW Canyon Rd  
Portland Oregon 97221

Portland Public Schools  
Charter School  
Renewal Application  
January 2, 2021

# General Information

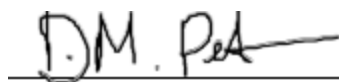
Name of School:	Opal Charter School
Name of Board Chair/President:	David M. Peterson
Phone Number of Board Chair/President:	(503) 813-4081
Email of Board Chair/President:	David.M.Peterson@kp.org
Name and Title of Contact Persons:	Beth Hutchins, Administrator Mary Gage Davis, Teacher-Administrator
Mailing Address of Contact Persons:	4015 SW Canyon Rd, Portland OR 97221
Phone Number of Contact Persons:	(503) 471-9902
Email of Contact Person:	<a href="mailto:manager@opalschool.org">manager@opalschool.org</a> <a href="mailto:charteradmin@opalschool.org">charteradmin@opalschool.org</a>
School's Initial Opening Date:	2001
Current Grades Enrolled:	K-5
Grade Levels to be Served at Full Enrollment <sup>1</sup> :	K-5
Maximum Projected Enrollment (at full capacity) <sup>2</sup> :	92



\_\_\_\_\_  
Signature of School Administrator

December 29, 2020

Date



\_\_\_\_\_  
Signature of Board Chair

December 29, 2020

Date

<sup>1</sup> This refers to the grade structure that has been approved by the district, rather than as an anticipated or desired future grade structure.

<sup>2</sup> This refers to the maximum student enrollment that has been approved by the district, rather than an anticipated or desired future student enrollment.

# Opal Charter School renewal application 2021

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G. Landscapes of Mathematical Development	
H. Crosswalk Between Common Core Standards and CFLM	
I. Becoming Who I Am (vimeo)	
J. Opal School Workshops 2019-20	
K. Story Workshop (Heinemann) publication announcement	

# Executive Summary

1. Provide the enrollment and demographic information for the current school year in the table below. Fill in only the white fields. Report percentages where indicated.

<b>Current Year Enrollment and Demographic Information</b>													
<b>Total Enrollment by Grade</b>													
K	1	2	3	4	5	6	7	8	9	10	11	12	Total
12	15	15	17	17	13								89
<b>Number of Students on Waiting List by Grade</b>													
K	1	2	3	4	5	6	7	8	9	10	11	12	Total
107	36	16	8	3	3								173
<b>Gender by Percentage</b>													
Female		44%	Male		55%	Non-Binary		1%					
<b>Ethnicity/Race by Percentage</b>													
Asian		Black/ African American		Hispanic/ Latino		American Indian/ Alaskan Native		Pacific Islander		White		Multi- Racial	
		1%		13%						80%		6%	
<b>Special Populations by Percentage</b>													
Students with Disabilities		English Language Learners			Homeless Students			Eligible for Free and Reduced Meals (by Direct Certification)			TAG		
13%		2%						3%			6%		

2. Provide a brief description of the school, including an overview of the mission and vision, educational program, community and local partnerships, and leadership and governance. (No more than one page.)

**Opal Charter School** opened in September 2001, as the first charter school authorized by PPS, and serves students in grades KG-5. The charter school sits within a larger system of *Teaching & Learning* as a program of Portland Children’s Museum (PCM). With Opal Beginning School (a private preschool), Opal School serves 125 students in programs for PreK-5.

Opal School is a living laboratory for adults and children to research environments and learning conditions that promote critical thinking and strengthen democracy. Opal School is inspired by the early childhood schools of Reggio Emilia<sup>1</sup>, which were founded after WWII as a counter response to fascism. Opal School continues research into practices that disrupt the conventional roles of educators and students. A foundational aspect of Opal School is the co-development of curriculum as it emerges from the interplay between student’s lived experiences and educator’s goals and expectations. When adults pay attention to the interests of children, children get serious about learning.

Through ongoing research, Opal School has developed a learning approach called *Playful Inquiry*. Supported by designed environments and rich materials, educators and students:

- share stories
- explore playfully
- sustain curiosity
- seek connections
- nurture empathy

We believe that *Playful Inquiry* retains the unique gifts of childhood, and supports students’ exploration of two of Opal School’s overarching intentions: • to seek out, value and be open to influence by a multiplicity of perspectives; and • to understand and appreciate the interdependence of all people, living things, and their environments.

Opal School’s research is presented to educators and the public through *Teaching & Learning’s* opportunities for professional learning<sup>2</sup>. We estimate that nearly 10,000 educators have participated with Opal School since 2001, touching the lives of perhaps one million students from Portland to Dubai.

Within PPS, Opal School has partnered with Woodlawn School to expand use of the arts as languages for thinking and learning, with Vestal School to deepen teachers’ understanding of and alignment with their newly adopted social justice mission, and with Kairos PDX to collaborate on professional development. We work with Teaching Preschool Partners (Beaverton, Gladstone, and Parkrose) to expand inquiry-based approaches in PreK-5.

Opal Charter School is governed by PCM’s non-profit board of directors - community and business leaders - elected by members of the board. The board authorized Opal Advisory Council, a group of parents and staff, with a non-voting representative to the board. PCM provides centralized services (finance, facilities, fundraising, other) to Opal Charter School.

Opal Charter School is a component of *Teaching & Learning* which includes Opal Beginning School (ages 3-5), and *Museum Center for Learning* (professional development for educators). The five leaders of *Teaching & Learning* - with a combined 60 years of history guiding Opal School through its early years, continuous adaptation, and the current COVID challenges - provide pedagogical and administrative leadership for Opal Charter School.

We continue to be energized by possibilities with both students and educators. Our earliest graduates are now young adults, and return with evidence of our learning approach in their lives, and of their contributions in the world<sup>3</sup>. We are regularly inspired by visiting educators, the influence of our research in their work, and their impact on students.

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<sup>1</sup> See [www.reggiochildren.it/en/](http://www.reggiochildren.it/en/) and <https://www.reggioalliance.org/reggio-emilia/reggio-children/>

<sup>2</sup> See [learning.opalschool.org/](http://learning.opalschool.org/)

<sup>3</sup> See [www.opalschool.org/becoming-who-i-am/](http://www.opalschool.org/becoming-who-i-am/)

# Record of Performance

This section provides charter schools with an opportunity to supplement or augment the performance record. Schools do not need to include Oregon Report Card data, as it is already on file. Schools should use the sources of data specified on pages 5-6 in this application as a guide for their responses and submit only evidence of performance related to the renewal criteria in ORS 338.065.

Responses may include, but are not limited to:

- Information about interim assessments or progress reports
- Evidence of performance on school- or mission-specific goals
- Evidence of implementation of district recommendations or plans of action
- Improvements undertaken at the school along with evidence of progress for any areas in which the school has not previously met or is not currently meeting the performance standard

Responses should not include anecdotal information or evidence that is not relevant to the school's academic, financial, and organizational performance and the school's performance expectations as defined by Oregon charter law and the charter contract.

Responses in this section should total no more than 20 pages.

Renewal recommendations will be based on all evidence of school performance in the record.

## A. Academic Performance

*Use this form to provide a narrative response to all questions below. If providing evidence in an appendix, clearly reference the appendix name/number in your response.*

1. In brief, describe whether or not the school has met its academic performance expectations over the term of the contract.

Opal School has met academic performance expectations over the term of the contract. Opal School students generally meet or exceed the benchmarks in OAKS and OSAS, in both English Language Arts and Mathematics.

2. Using data from the "Sources of Data" section of this application, describe the trends in performance<sup>4</sup> over the term of the contract in the following categories:
  - a. Student performance in Reading by grade
  - b. Student performance in Reading by race/ethnicity
  - c. Student performance in Reading by special population (ESL, SpEd, FRL, TAG)
  - d. Student performance in Math by grade
  - e. Student performance in Math by race/ethnicity
  - f. Student performance in Math by special population (ESL, SpEd, FRL, TAG)

Opal School students generally meet or exceed OSAS benchmarks. In each school year, the testing sample size is too small to draw strong conclusions about performance trends, and this is particularly true for each of the special populations.

Opal School's pedagogy of listening and relationships ensures that teachers have a robust collection of student work samples, transcriptions of dialogue, detailed observation notes and formative assessments for each student. This collected evidence allows for analyzing and reflecting upon individual students' strengths and learning edges, as well as responsive goal setting throughout the year. Each Fall, Opal School teachers develop individual goals for students that include academic content areas and characteristics of the learner reflective of Opal School's goals and expectations. These goals are reviewed and revised at regular intervals throughout the year.

Opal School students have broadly and consistently met or exceeded individual academic growth goals in reading, writing and mathematics demonstrating adequate yearly progress. When a child is not meeting goals, staff intervene early and often, involving the collaborative teaching team, students and families.

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<sup>4</sup> Trends in performance include growth and negative growth.

3. Describe the major academic goals of the school over the term of the contract. Explain how these have been met/not met.

Grounded in Our Values<sup>5</sup>, Opal School's academic goals are intertwined with other equally important goals<sup>6</sup>, as expressed in our **Goals + Expectations for Students**<sup>7</sup>:

- Discover, cultivate and express the joy and wonder of learning.
- Develop an understanding and curiosity about multiple points of view.
- Have value and empathy for experiences and perspectives different from one's own.
- Collaborate with others to construct ideas and create new knowledge.
- Develop an understanding of our interdependent relationship with the natural world.
- Take action as mindful citizens who care about making contributions to a future that acknowledges living systems as an integrated whole.
- Develop strategies that contribute to the quality of the community by having a keen sense of place, identity and belonging, while respecting the rights and identities of others.
- Read the world: Explore ideas and relationships; make connections between known and unknown information.
- Use the written and spoken word with increasing proficiency to communicate ideas, relationships and understandings.
- Uncover and communicate observations, questions, theories and ideas through skillful and imaginative uses of the languages of the arts and sciences, including mathematics.
- Develop an appreciation of and capacity for accuracy, elegant design and efficiency.

### **Playful Inquiry**

Opal School's academic program is grounded in *Playful Inquiry*<sup>8</sup>, our approach to teaching and learning. We present some information about *Playful Inquiry* here, to ground the following discussion of academic goals.

*Playful Inquiry* is an open-ended and joyful exploration of materials, ideas, skills, and big questions that fill the senses and keep the mind open to learn. Neuroscience is clear that environments devoted to learning must be both cognitively challenging and aesthetically pleasing, to support a playful disposition in the learner. This playful disposition is achieved when conditions create high cognitive challenge with low emotional risk: relaxed alertness, the optimal state for learning. Opal School students generally exceed our goals and expectations and often produce sophisticated thinking, speaking, and writing above the Common Core standards for their grade level.

Opal School has been active in our research of questions such as:

- How do we use play in service of children learning the things they have a right to learn?
- How does maintaining a playful attitude facilitate learning and high achievement?
- Is it possible that an environment that invites play is also one that invites a sustained vigorous attitude towards learning?

Particularly in our work with older elementary-aged children - where we might typically begin to see disengagement take hold and don't typically see play in school - we find that the impact of this intentional invitation to play is most visible, surprising and profound.

We use *Playful Inquiry* as powerful scaffolding to support children as they mature to take over the inquiry process in pursuit of their own curiosity, questions and concerns. *Playful Inquiry* supports children as they develop the strong habits of heart and mind necessary for an increasing sense of agency and taking action as mindful citizens.

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<sup>5</sup> See Appendix A: Opal School Mission and Values, and Appendix B: Guiding Principles

<sup>6</sup> See "The Graduate Portrait," [Portland Public Schools reImagined](#)

<sup>7</sup> See Appendix C: Goals and Expectations for our Students and Appendix

<sup>8</sup> See Appendix D: The Principles of Playful Inquiry

We see the primary task of the adult to offer experience and expertise that intentionally ties the present lives and stories of the children to the big, public stories of our history and complex issues within the present - to help children feel a part of the human experience and not separate from it, waiting or preparing for a distant future. These strategies not only support children as social constructivist learners, readers, writers, and mathematicians, but also allow them to participate authentically in their community, thereby strengthening their habits of engagement - never asking them to set them aside and wait for a later opportunity.

**If play is a powerful learning strategy of the human species, how do we make sure that in school, children are using it to learn?**

## **Academic Goals**

Major academic goals during the term of our charter included increased growth as readers and writers, strengthening students' mathematical reasoning and understanding, and increasing student access and comfort with technology. Each of these goals is supported by *Playful Inquiry*.

Student growth as readers and writers is supported within the structures of *Story Workshop* and *Literacy Studio*. Student growth is measured and documented along Reading and Writing<sup>9</sup> Developmental Continuums in addition to Developmental Reading Assessments (DRA), Words Their Way Spelling Inventories, analysis of student work samples with State Scoring Guides and Opal/PPS Rubrics, student interviews and anecdotal observations. Assessment of understanding is daily and ongoing.

Math instruction at Opal School lives within the context of how we approach teaching and learning (*Playful Inquiry*) and grounded within our image of children, our values and our growing understanding of the Landscapes of Mathematical Development<sup>10</sup>. Our work is informed by state and national standards<sup>11</sup>, alongside our desire to create communities of mathematicians where mathematizing drives our work. We believe that relationships are fundamental to mathematical thinking - relationships between teachers, children and families; relationships between materials and environments; relationships within and across disciplines; relationships between big ideas, strategies and models; as well as relationships between numbers. We believe that children learn best, within a context, when children are offered situations to imagine themselves in so that their mathematical thinking has real work to do. These beliefs are reflected in our curriculum (*Contexts for Learning Mathematics*<sup>12</sup>), workshop structure, and assessment.

## **Story Workshop**

In *Story Workshop*, a structure Opal School developed to support playful literacy in grades k-2, we organize instruction with a balance of these elements in mind: sharing stories, ample use of the arts, meaning making, and time to play. Environments intended to support both independent and collaborative storytelling are designed by teachers who make decisions in response to observations they have made of the children. Because research in neuroscience shows that in play, the children are naturally constructing narratives, we expect them to play in these environments and become increasingly aware of the stories they are creating while they play. Teachers will approach children as they play and ask, "What's your story?" In this way, children learn that the naturally engaging and satisfying work of their play has real value to the world of school, to the work of authoring, to the practice of literacy. Through whole group reflection and sharing, they develop a vision of what it can mean to live and work in a community of authors who act as listeners and can

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<sup>9</sup> See Appendix E: Reading Developmental Continuum and Appendix F: Writing Developmental Continuum

<sup>10</sup> See Appendix G: Landscapes of Mathematical Development

<sup>11</sup> See Appendix H: Crosswalk Between Common Core State Standards for Mathematics and CFLM

<sup>12</sup> Visit [www.newperspectivesonlearning.com](http://www.newperspectivesonlearning.com) and [www.heinemann.com/contextsforslearning/](http://www.heinemann.com/contextsforslearning/)

reflect back to one another the people they are all in the process of becoming. As they mature, children are expected to capture their stories in writing, to revise, edit and publish their work. Play, including with the arts, is central to the writing process of young children.

### **Literacy Studio**

In older grades, within *Literacy Studio*, students develop increasingly sophisticated reading and writing skills and attitudes through the application of the arts, lived experience, and mentor texts. *Literacy Studio* provides opportunities to integrate content areas and imagine new possibilities for what it might mean when the state of Oregon requires the study of early American history. Within a past *Decades Project*, children became invested in the decades they were researching as they built a collaborative timeline, and they asked to try and write historical fiction based on the experience of a child living in that decade. The teacher offered a time machine so they could come to school one day in character and meet one another. On such a day, children write reflections like this:

*Yesterday when we climbed into the body of our character was probably the most fun I have had this whole school year. The way that everybody was able to "leave themselves" at this year just completely worked. Everybody has worked so hard to learn everything they possibly can about their decade and that really showed and paid off. I felt that it went really well and was really fun when we went outside because a lot of the characters had never even heard of a playground." -Opal School fifth grader*

This particular project met state requirements by having the children use that time machine to attend the Constitutional Convention and deliver speeches they'd written from the perspective of the character they'd created. They hoped to inform the Framers of the experiences they'd lived in the country governed by the Constitution, and they hoped to engage the Framers in revisions based on those experiences that might have provided a more equitable pursuit of liberty for their posterity. Children were challenged to articulate and more fully explain their positions, and ultimately coming to consensus on new language.

One suggested revision read like this:

*When there are sides that are not in agreement, make a compromise that will make all sides happy enough to avoid conflict.*

This revision is not surprising because this is the very work children face, themselves, in their play all the time, and that these children had been working out with one another all year. Their experience is part of the human experience. And learning that comes as a result of reflection on that experience has value for the world we create as we live it, endlessly into the future. This is what *Playful Inquiry* invites us to discover and trust.

### **Math Workshop**

In support of our mathematics goals, we have organized all math instruction in small groups. We have reduced group sizes so that every individual is even more visible than they might otherwise be, resulting in more targeted instruction. Teachers offer rich and intentional problems with many entry points for diverse learners. Math mini-lessons, investigations and congresses are structured to support children to become flexible, efficient and elegant mathematical thinkers and communicators.

Students are evaluated on their understanding of big ideas, use of problem solving strategies and construction of mathematical models. More formal assessments are given throughout the year to provide snapshots that support the development of planning for instruction that is responsive to the needs of both the individual and the group. Growth over time is documented within individual student landscapes based on formal assessments, analyzing of student work, classroom observations and transcriptions of mathematical dialogue.

Opal School students consistently meet individual math learning goals, although some students have demonstrated gaps between classroom assessments and demonstrated learning through state work samples and testing. Opal School recognized the need for greater calibration of work sample scoring amongst staff, opportunities for students to practice their individual mathematical reasoning alongside collaborative partner work, strengthening mathematical vocabulary and growing staff understanding of the mathematical landscape. These issues have been addressed through internal professional development including weekly team meetings, organization of new systems of documenting student learning and growth over time and purchasing of additional professional support materials (curriculum and assessment).

## **Technology**

One of the identified challenges and related goals within the charter school over the term of the contract was student access and experience with digital technology. This issue impacted some students' attitude toward computer-based testing and their ability to access/demonstrate knowledge within a digital format.

Opal School believes that digital technology enters the daily life of the school not to dominate but to merge with other forms of expression. Digital technology can amplify what we have in our imaginations, it can create worlds that can be situated elsewhere in time and place, and it can allow us to find out more information. Our goal is for students to become literate and fluent in the possibilities of digital technology as a research, communication, and publishing tool in ways that support Opal School values. In a school that values a strong image of the child as creative, competent and resourceful, full of wisdom that the world needs, there should be no need for technology to motivate children to connect with an idea. The idea must have merits and opportunities to connect and engage in its own right.

Being in solidarity with children means acknowledging that learning is sometimes a struggle. It is the teacher's role to support children to remain active in this struggle. As adults we must be vigilant about protecting children from the lure of digital technology to solve our struggles, or to learn for us. Digital technology must support the children as authors who can ultimately express their ideas in myriad ways, with confidence, competence, and ingenuity.

Opal School initially purchased a small set of Chromebooks in 2015 to use throughout the school and has since increased the number of available devices as budget allowed. Prior to Comprehensive Distance Learning (CDL), access and introduction to technology, including digital citizenship and keyboarding, began in third grade. Student comfort level, skill and understanding of the affordances of digital technology have increased as demonstrated through collaborative digital projects, individual student publishing, internet research, keyboarding and observation of on-line test taking.

4. Describe the major academic recommendations from the district over the term of the contract. Explain how these have/have not been implemented.

In 2013-14 the district recommended that Opal School provide increased access and experience with technology in grades 3-5 within the context of the classroom curriculum.

Opal School purchased a small set of Chromebooks in 2015 and integrated these into the writing curriculum. We have purchased additional Chromebooks over the subsequent years as budget allowed. Chromebooks are now an integral part of the writing curriculum in grades 3-5, and are also used by students for teacher-guided research.

In 2016-17 the district recommended that Opal School add a goal of reducing the rate of students who are categorized by ODE as chronic and severely absent.

Opal School implemented a communication strategy to support this goal, and chronic and severe absenteeism was reduced from ~22% in 2016-17 to ~10% in 2017-18 and 2018-19. While the response may seem strong, this has been an imperfect rollout. Early communications - based on our understanding that communications should be standardized and uniform to avoid potential bias - caused harm to families whose student absence is largely out of their control. We revisited our communication strategy to be more consistent with our pedagogy of listening and relationships, with the goal to build awareness of the impact of high absence rates on both community and individual student learning.

In 2018-19 the district recommended that Opal School increase its OSAS participation rate to increase the statistical validity of testing data, in particular for student subgroups.

Opal School's small cohort of testing-age students results in a sample size that is too small to draw statistically valid conclusions, even when considering the entire student body, and particularly with special populations. Opal School's small size, and our practice of observation and documentation, results in detailed notes and ongoing assessment. Our collaborative teaching structure allows robust discussion of next steps for each student, and an individual response to and revision of each student's educational plan.

Opal School continues to communicate with families about the role of Oregon standardized assessments. Our families often choose Opal School because of their alignment with our goals and expectations, and our emphasis on social-emotional development and relationships, as a foundation for student engagement and learning. Opal School families are aware of and often embrace their rights under Oregon law to opt-out their student from OSAS testing.

In 2018-19 the district recommended that Opal School "investigate the effectiveness of its K-3 mathematics instruction, as the 3<sup>rd</sup> grade test data is the only level showing results lower than District average."

Note: the 3<sup>rd</sup> grade testing cohort was 14 students.

Opal School added an Academic Action Goal to strengthen K-5 mathematics instruction. In 2019-20, we expanded instruction hours, purchased newly-available mathematical contexts (to replace school-developed curricula in specific strands), purchased assessment tools for teachers tied to mathematical landscape, and added a professional development focus.

Opal School believes that these standardized test scores highlight the difference between our students' strong mathematical understanding - as developed through our social constructivist practice and demonstrated in math congress - and the limitations of isolated questions, assumptions and methodology in OSAS testing and state work samples.

We consider standardized, summative assessments to be only one measure of student learning, and not the only measure. We place a strong value on the social, emotional and cognitive learning that is made visible through students' participation in collaborative, long-term, inquiry-based projects, the depth of their questions, the creative thinking and innovative approaches they use to solve problems and conflicts, and their abilities to use materials, the arts and the sciences as languages for communicating complex ideas. These valuable life skills are not readily measured with multiple choice questions or standardized testing. However, they are critical abilities that our children and our society need to thrive in the twenty-first century.

5. Provide evidence of outcomes related to any mission-specific academic goals and measures established in the charter contract or in the school's own performance plan.

People oftentimes ask, "What becomes of children after they graduate Opal School?" Our new film, [Becoming Who I Am](#)<sup>13</sup>, illustrates how these learning environments lead students to become the neighbors, coworkers, and changemakers the world needs. We encourage you to hear directly from some of Opal School's alumni who are now young adults.

6. Provide any other academic performance-related evidence, supplemental data, or contextual information that may not be captured in the district's records or in other information provided in this application. All information should be aligned to the renewal criteria stated in ORS 338.065. Any appendices should be clearly referenced. Do not restate information that has already been provided.

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<sup>13</sup>See Appendix I: Becoming Who I Am (vimeo), also [www.opalschool.org/becoming-who-i-am/](http://www.opalschool.org/becoming-who-i-am/)

## B. Financial Performance

*Use this form to provide a narrative response to all questions below. If providing evidence in an appendix, clearly reference the appendix name/number in your response.*

1. In brief, describe whether or not the school has met its financial performance expectations over the term of the contract.

Yes, Opal Charter School has met financial performance standards over the term of the contract, and maintained maximum enrollment each year. The municipal audit for Opal Charter School consistently receives an unqualified opinion.

2. Using the data from the "Sources of Data" section of this application, describe the trends in performance over the term of the contract in the following categories:
  - a. Near-term measures (assets to liabilities, unrestricted days cash, default)
  - b. Sustainability measures (total margin, debts to assets, cash flow, financial reporting and compliance, municipal audits)
  - c. Long-term measures (financial planning, budgeting, fundraising, grants)

Opal Charter School operates as a component of Portland Children's Museum under a lean budget, with Asset:Liability ratio of 2.0, and approximately 90 days unrestricted cash. Opal Charter School generally generates positive cashflow, and has no significant debt due to a favorable building lease in exchange for substantial investments in leasehold improvements - both capital and volunteer labor.

Opal School has budgeted conservatively in recent years, and manages expenses to meet available revenue. Year-to-year changes in Assets and Liabilities related to outflows and inflows of resources (PERS accounting transactions) impact our financial statements, but not our cash position or practices.

Opal Charter School's financial planning and budgeting are developed in consultation and coordination with PCM's *Teaching & Learning*, with revenue earned from professional development offerings also used to provide non-instruction support and leadership for Opal Charter School.

3. Describe the major financial goals of the charter school over the term of the contract. Explain how these have been met/not met.

Over the term of this charter contract, our major financial goals included:

1. building earned revenue capacity from professional development offerings;
2. negotiating equitable sharing of costs for centralized services;
3. building a culture of community fundraising;
4. coordinating fundraising efforts with Portland Children's Museum.

Prior to the disruption of COVID, we were advancing toward each of these financial goals.

Earned revenue from professional development offerings has grown steadily during the term of this contract, and (pre-COVID) was expected to bring in over \$500K in 2019-20, approximately equal to 85% of SSF funding. Opal School has invested over a number of years in an online learning management system, and this allowed us to pivot to remotely presenting the annual Opal School Summer Symposium. Opal School's in-person and online courses are attended by educators from around the world. Opal School staff have provided conference presentations and customized consultations to organizations across the United States and around the world. Recent engagements have been hosted by NCTE's Early Childhood Assembly (USA), Central Okanagan Public Schools (Canada), GEMS Education (Dubai), Hong Kong International Schools, and Semann Slattery (Australia).

As a program of Portland Children's Museum, Opal Charter School is engaged in ongoing dialogue and negotiation about the use and cost of shared services, with the goal to optimize and streamline processes to support the entire organization. These efforts are ongoing.

Opal School has an enthusiastic community of supporters, and is limited in fundraising due to the small size of our school community, and the lack of major giving capacity.

4. Describe the major financial recommendations by the district over the term of the contract. Describe how these have/have not been implemented.

The district has not made any financial recommendations during the term of this contract.

5. Provide any other financial performance-related evidence, supplemental data, or contextual information that may not be captured in the district’s records or in other information provided in this application. All information should be aligned to the renewal criteria stated in ORS 338.065. Any appendices should be clearly referenced. Do not restate information that has already been provided.

Oregon Charter Schools operate with funding limitations and increased expenses, compared to district schools. Charter schools are not able to participate in some of the public funding streams available to district schools, and charter schools are subject to the highest PERS rate in Oregon. The following table illustrates the funding gap and impact of PERS on a hypothetical budget for a charter school the size of Opal School:

		Budget Approximation		
		District	Charter	Comparison
Revenue*				
	Local Option	\$149,000	\$0	0%
	SSF	\$773,820	\$619,056	80%
	SIA	\$20,000	\$20,000	100%
	PDX Arts Tax	\$11,000	\$11,000	100%
		\$953,820	\$650,056	68%
Expenses**				
	Instruction:			
	- Salaries***	\$562,500	\$351,000	62%
	- PERS	\$22,500	\$94,770	421%
	- Payroll Overhead	\$121,444	\$84,065	69%
	Support Services	\$247,255	\$175,000	71%
		\$953,699	\$704,835	74%
Funding Gap				
	Other Sources		\$54,779	
	Required		8.4%	

\*Does not include other public revenue from property taxes, or federal program funding.

\*\*Does not include the usual expense for building lease. Opal Charter School has reduced rent, in exchange for prior investment in leasehold improvements.

\*\*\*"District" Salaries are calculated per PAT contract to mirror charter school teachers (FTE equivalent for grade and step).

The burden from this compression of revenue and expenses is born by licensed teachers, who receive significantly lower compensation compared to district teachers. This impacts our ability to recruit and retain teachers, especially as they gain experience and steps in the salary scale. While we welcome the opportunity to train teachers who will work in district schools, it adds another dimension to the work of the school with it’s tight budget.

## C. Organizational Performance

*Use this form to provide a narrative response to all questions below. If providing evidence in an appendix, clearly reference the appendix name/number in your response.*

1. In brief, describe whether or not the school has met its organizational performance expectations over the term of the contract.

Yes, Opal Charter School has met its organizational performance expectations over the term of the contract.

2. Using data from the "Sources of Data" section of this application, describe the trends in performance over the term of the contract in the following categories:
  - a. Implementation of the terms of the educational program as defined in the charter contract
  - b. Compliance with applicable education requirements
  - c. Protecting the rights of all students, including students with disabilities and English Language Learners
  - d. Compliance with applicable governance requirements
  - e. Holding the administration accountable
  - f. Compliance with reporting requirements
  - g. Compliance with teacher and other staff credentialing requirements
  - h. Compliance with facilities and transportation requirements
  - i. Compliance with health and safety requirements
  - j. Handling information appropriately
  - k. Compliance with all other obligations

Opal Charter School meets ORS expectations for organizational performance in all areas.

Opal Charter School has implemented and innovated its educational program during the term of this contract. We continue to hone our practice of *Playful Inquiry*, and have invested in research to develop *Story Workshop*, a structure that supports early literacy development through *Playful Inquiry* and the languages of arts and sciences.

Opal Charter School understands and protects the educational and privacy rights of our students, including students with disabilities and English Language Learners.

Opal Charter School understands and is in compliance with educational, governance, reporting, credentialing, health and safety requirements and other charter school obligations.

3. Describe the major organizational goals of the organization during the term of the contract. Describe how these have been met/not met.

**Administrative Structure:** Opal Charter School has revised its supervisory and administrative structure. For school administration, the management and supervision of teaching and learning was separated from the management of the school infrastructure. Two members of the leadership team collaborate, but have separate areas of responsibility: curriculum support, teacher supervision and professional development, vs systems, infrastructure, reporting and compliance.

With this administrative structure, Opal Charter School has invested in communication and management systems that better support the needs of the school (staff and families), and streamline office operations.

**Management Systems:** Opal Charter School has invested in systems to capture and disseminate the institutional knowledge regarding policies and practices, whether related to office and enrollment processes or curriculum development and resources. Opal School has implemented systems to track Opal School alumni.

**Teacher Retention:** Opal Charter School continues to address the goal of increased teacher retention, through compensation policies and review as well as workload considerations. Teacher retention has an outsized impact on our very small school. We have adopted - but have not yet fully achieved - a salary scale for licensed teachers that is different from the salary scale for non-licensed museum staff. While we have made some progress toward fair teacher compensation, our licensed teachers are paid significantly less than licensed teachers under the PAT contract. We have made some progress to align expectations with work load and provide additional systems and support.

**Shared Service Expense:** As a program of Portland Children's Museum, Opal Charter School is engaged in strategic planning and discussions related to core mission support, and continues to work toward redefining a complex organizational structure to support all programs.

**Transportation and After-school Care:** Opal School developed plans to provide home-to-school transportation for students, as this has been identified as a strong community need and a major barrier for families - particularly families experiencing poverty - to attend Opal School. Opal School administration worked with PPS Transportation to develop a single bus route that would provide transportation from a limited number of access points, and also worked with PPS contracted providers to create a web of after-school care providers who would serve as those access points. This plan addressed two major needs of our community that hinder our efforts to enroll underserved PPS students.

PPS Transportation has been unable to implement this plan due to staffing constraints.

4. Describe the major organizational recommendations from the district over the term of the contract. Describe how these have/have not been implemented.

In 2013-14 the district recommended that "PCM administration should consider adding support to school administration, given the workload and the expectations of the school, some of which are outside the scope of school operations."

Opal School restructured its administrative function to better support school operations. It is important to note that Opal School's very small size (90 students) and varying physical classroom sizes (one with 15 students) precludes any benefit from economy of scale.

In 2014-15 the district recommended that Opal School revise its lottery application to better protect student privacy and to clarify the status of out-of-district applications.

Opal School has implemented these recommendations.

PPS has recommended that Opal Charter School consider implementing a weighted lottery, with the goal to diversify its student population in multiple dimensions.

The statute to allow a weighted lottery - without a waiver - is no longer in effect<sup>14</sup>. Opal Charter School has determined that the risk and cost of potential litigation arising from a weighted lottery is too high compared to our limited reserve, and could jeopardize the viability of the school at this time. Further, we believe that there are many factors contributing to the lack of diversity at Opal School, and a weighted lottery is unlikely to have a significant impact. Some thoughts: The percentage of students enrolled from diverse backgrounds is lower than their percentage in our lottery. We receive a higher percentage of lottery applications for students in older grades, and rarely have openings in these grades. We know that many families are unable to accept an offer of enrollment due to our location, lack of transportation, lack of onsite after-school care, and other wrap-around services. While we have many strategies - and success during Opal School's early years - to address these issues, our current ability to do so is subject to multiple constraints: location, funding, reliance on partners (PPS Transportation). With full funding of the SIA (Student Investment Account) we will begin addressing the most urgent needs of our community.

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<sup>14</sup> [www.oregonlaws.org/ors/338.125](http://www.oregonlaws.org/ors/338.125)

5. Provide any other organizational performance-related evidence, supplemental data, or contextual information that may not be captured in the district's records or in other information provided in this application. All information should be aligned to the renewal criteria stated in ORS 338.065. Any appendices should be clearly referenced. Do not restate information that has already been provided.

Some of the intentions of Oregon ORS 338.015<sup>15</sup> are

- (5) Encourage the use of different and innovative learning methods;
- (7) Create new professional opportunities for teachers;

Since 2001, Opal School has hosted visiting educators, traveled to many countries for consultations, and welcomed participants to Opal School Online<sup>16</sup>.

The research that was foundational for *Playful Inquiry* led to the development of *Story Workshop*:

*Story Workshop is inviting teachers who understand that children learn best through play, but struggle to find a place for it, to infuse it right into literacy instructional time, and they are seeing the explosion of motivation and engagement that happens when they do. Story Workshop is helping teachers who have practiced Writer's Workshop for a long time, but have been challenged by those students that never have anything to write about, find out that all children have stories to tell. Story Workshop is allowing teachers who lament the loss of the arts in the child's school day find a way to put them to use in new ways that work for everyone.*

Having started at Opal School, the structure of *Story Workshop* is now being used in classrooms around the world, by hundreds of teachers. *Story Workshop* has been the subject of workshops for educators - both in-person and on-line - and now will be a book written by Opal School faculty, ***Story Workshop: New Possibilities for Young Writers***, to be published by Heinemann in Spring 2021<sup>17</sup>.

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<sup>15</sup> [www.oregonlaws.org/ors/338.015](http://www.oregonlaws.org/ors/338.015)

<sup>16</sup> See Appendix J: Opal School Workshops 2019-20

<sup>17</sup> See Appendix K: *Story Workshop* Publication Announcement, also: [www.opalschool.org/announcing-story-workshop-new-possibilities-for-young-writers/](http://www.opalschool.org/announcing-story-workshop-new-possibilities-for-young-writers/)

# Plans for the next charter term

This section provides the charter school with an opportunity to discuss plans for the next charter term. Charter schools should use this section to outline a deliberate plan for sustaining success, addressing areas requiring improvement, and ensuring the ongoing viability of the organization.

**Charter schools should also use this section as an opportunity to identify all material modifications, changes or additions that the school may be seeking during the next charter term.** Examples of this include, but are not limited to: adding or removing grades, raising the enrollment cap, substantively changing the instructional model or the mission, operating in more than one location, etc. In the case of such requests, the district reserves the right to request additional information so that it may sufficiently assess the impact and planning for such changes. Even if the proposed changes would occur several years into the next charter term, the charter school should outline them here, as any substantial change will be part of the next contract. **Any proposed substantive modifications must be stated in this section and are subject to approval by the district consistent with policy and state law.**

**Note:** Responses to this section will not be the basis for the district's decision for renewal or non-renewal. Consistent with NACSA's *Principles and Standards for Quality Charter School Authorizing*, the district will make its decision based on the school's record of performance, as opposed to the promise of future performance or improvement. All renewal decisions will be aligned with the criteria for renewal stated in ORS 338. If the school's renewal application is approved, the plans presented below will inform relevant sections of the charter contract for the new term.

*Instructions: Use this section to describe the charter school's academic, financial, and organizational plans for the next charter term. As stated above, describe any proposed material modifications that the charter school will seek in the next term. This section should not exceed 10 pages.*

## A. Academic Plan

Opal School is excited to align with the **Portland Public Schools Reimagined** initiative, and plans to use our learning approach of *Playful Inquiry* as the conduit to prepare students to lead change and improve the world through compassionate, critical thinking and the ability to collaborate and solve problems, in order to be prepared to lead a more socially just world.

*Playful Inquiry*, developed over 20 years of research at Opal School, is an approach to learning which thrives on community, and courageously and collaboratively relies on the unique gifts of childhood. *Playful Inquiry* helps children question what it means to be a citizen world-maker in the midst of uncertainty.

The principles of *Playful Inquiry* - telling stories, connecting with one another, being curious about the world, seeking meaning, and even being good to one another<sup>18</sup> - are hard-wired into our species. In other words, we're not broken - but some of our current systems most certainly are. In our efforts to organize, industrialize, strategize, standardize - we've lost our way, and we've obscured the creative birthright of many who've happened along. By placing a value on our natural learning strategies in our communities and our institutions, Opal School helps shift our culture towards a sustainable future, and support children to be changemakers.

To be responsive to a child's innate sense of wonder is to help choreograph a life-long dance with the world that we experience and create as we live out our lives. As Opal School creates environments steeped in playful inquiry, we support children to grow into adults who have an understanding of their own capacities—whose minds have richly developed pathways layered with possibilities for new and flexible connections. These are minds that can solve complex problems, invent novel solutions, lean into difference with curiosity, imagine another's perspective and communicate with confidence and competence.

We believe *Playful Inquiry* can play a role in our pursuit of a more just and equitable world, and plan to use classrooms as the laboratory for teachers and children to co-research some of the following questions:

- What is the relationship between *Playful Inquiry* and anti-racist, pro-democracy education?
- What are the rights of children and responsibilities of adults within anti-racist , pro-democracy education?
- How might exploring stories from the past alongside current issues, fuel curiosity as a pathway to empathy, understanding and belonging?
- How do we create a culture where listening is transformational for all?

Children willingly place themselves in the position of struggle and disequilibrium. And that hard work is the work of freedom. In her call for a new education system, Dr. Bettina Love quotes Michael Hames-García:

"The very fact of freedom's incompleteness (no one is free so long as others remain unfree) necessitates action directed at changing society. Freedom, therefore, is ultimately a practice, rather than a possession or a state of being."<sup>19</sup>

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<sup>18</sup> Daniel Goleman, *Social Intelligence: The New Science of Human Relationships* (2006)  
[www.powells.com/book/...-9780553803525](http://www.powells.com/book/...-9780553803525)

<sup>19</sup> Bettina Love, *We Want to Do More Than Survive: Abolitionist Teaching & the Pursuit of Educational Freedom* (2019, p9)  
[www.powells.com/book/...-9780807069158](http://www.powells.com/book/...-9780807069158)

Playful Inquiry is intended to facilitate that practice. At Opal School, we believe that children have a right to joy. But we agree with Love's definition when she writes,

"I am talking about joy that originates in resistance, joy that is discovered in making a way out of no way, joy that is uncovered when you know how to love yourself and others, joy that comes from releasing pain, joy that is generated in music and art that puts words and/or images to your life's greatest challenges and pleasures, and joy in teaching from a place of resistance, agitation, purpose, justice, love, and mattering."<sup>20</sup>

The world is an uncertain place and play is the strategy we have that makes it possible for us to thrive; play invites a welcoming attitude toward change and makes not knowing less dangerous. Play makes learning less dangerous. In Playful Inquiry we ask not only what supports children to be seen and heard but also what at the same time communicates to children that they are *worthy* of being seen and heard. We strive to create practices that support each child to walk into the classroom each day knowing that they matter and that the work that goes on there each day couldn't happen without them--that it wouldn't be the same without them. Playful Inquiry strives to ensure children learn how to live like they matter.

## B. Financial Plan

Opal Charter School has a long history of tight and lean financial planning and execution. With the reality of a new relocation and the possibility of expanded enrollment, the school will rely on some small economies of scale, leading to enhanced financial stability. At the same time, Opal Charter School will need to budget for school lease expenses that are not incurred at its current location - the benefit of prior capital and volunteer labor invested in its facilities (see **New Location**, under section C. Organizational Plan, next).

Opal Charter School has a financially synergistic relationship with *Museum Center for Learning* - contributing to revenue-producing events and products, and also using those revenues to provide support services. We anticipate a return to robust revenue post-COVID restrictions, and increased revenue-producing opportunities when we are located in a facility with fewer constraints.

## C. Organizational Plan

The COVID-19 pandemic has impacted the timeline related to Portland Children's Museum's strategic 10-year roadmap to a new location. The call for racial and social justice has strengthened the desire for organizational transformation and highlighted the need to support all children in our region, especially families who are Black, Indigenous and people of color. *Playful Inquiry* is a lense that serves not only students and educators, but also open possibilities for our work with each other (colleagues) and the visiting public at Portland Children's Museum. We envision the future as *The Center For Playful Learning*. Opal School's pedagogy and research are integral to this transformation.

In practical terms, the broad strokes for the next few years for Opal School and Portland Children's Museum are:

- New Location
- Increased Enrollment in K-5
- Publicly-funded Preschool

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<sup>20</sup> Love (2019, p15)

## **New Location**

The 30-year lease at our current location will expire in 2031, and our landlord (Portland Parks & Recreation) has notified us that our lease will not be renewed - our building is not included in the Washington Park master plan. While we are cognizant of the difficulties in finding a suitable site for a charter school, we believe this forced relocation is an opportunity to expand and diversify our student enrollment in important ways. We are committed to becoming (again) a school that serves historically underserved students. We believe Opal School will be strongest when its community is reflective of Portland.

A significant limiting factor in outreach, recruitment, and retention is our current location in Washington Park. As we develop criteria for a new location, we will seek a location that is accessible to a multi-lingual, multi-racial, multi-ethnic population within a poverty-impacted area. At this time, we do not know whether we will co-locate with Portland Children's Museum, and this will become clear during the next years of strategic planning and goal-setting for the school and the public museum programs. It is important to Opal School to provide wrap-around services for students, and the school would seek a location where we can be in partnership with organizations who serve children and families, and weave the school into a network of support for them.

## **Increased Enrollment**

A new location will likely provide an opportunity to serve more PPS students who seek school choice. On average, we have more than 10 lottery applications for each opening in our school each year. We are unable to expand in our current four classrooms. Increased enrollment would have positive impacts in a number of realms, including: student experience, teacher experience, professional development, community partnerships, and finances.

Increased enrollment would serve our students.

The current small student body sometimes creates social challenges as children may be with the same small grade level group for 6 years. With a limited number of classrooms, children are not always provided enough opportunities to rewrite the story of who they are in the eyes of their peers nor enough opportunities to reimagine the story of others. More than one classroom per grade would give additional flexibility in grouping students. We know that the emotional and cognitive domains are intertwined, and learning is impacted when there are unmitigated tensions in group dynamics.

Increased enrollment would serve our teachers.

Because visiting educators are observers in our classrooms, it can be one additional hurdle to hire a teacher who has less experience because of the expectation to teach in this public setting. With more classrooms available, there is an opportunity for new teachers to grow their practice with less public observation. For established teachers, more classrooms could mean fewer or alternating groups of visiting educators, because they other classrooms are available. This could contribute to the goal of better management of teacher workload. We would also have a greater ability to weather teacher transitions.

Increased enrollment would serve professional development.

Additional classrooms would provide more laboratories for research and documentation, and more opportunities for visiting educators to observe our pedagogy. A more diverse student body could make our pedagogy more obviously accessible to more teachers.

Increased enrollment would serve community partnerships.

Having more educators would provide greater opportunities for collaboration with other schools and community organizations serving children and families. A larger faculty would provide new teachers with multiple opportunities for mentorship with different experienced teachers.

Increased enrollment provides greater financial stability.

The administrative effort to manage a charter school does not expand at the same rate as enrollment, and additional funding could translate into salary increases or additional support staff.

We have considered more than one option for expanding our program, and recognize that it is not possible to predict future enrollment capacity until a new location is selected. The primary options are:

1. to enroll 150 students in 6 classrooms, and
2. to enroll 250 students in 10 classrooms.

While we do not aspire to become a large school, we have learned that it is a challenge to meet competing needs in a school of 90 students.

### **Transitioning to a Publicly-Funded Preschool**

Opal Charter School benefits from its close relationship with Opal Beginning School, currently a private preschool. Opal School educators from preK to grade 5 work together in conducting research and providing professional development for our own staff and for others. Charter School students who are early readers benefit from reading to even younger (preschool) children, while older elementary students develop empathy and compassion through their relationships with preschool-age students. Opal School exists as a unified school, even while the two programs have different enrollment criteria and funding sources. This is not without tensions.

We are eager for the opportunity to enroll preK students who receive a publicly-funded early education. Over the next few years, we plan to transition from private tuition to a publicly-funded program, and welcome a more economically diverse group of students and families. We expect to begin enrolling students under Preschool For All in 2022-23, and this program will grow over time.

We know that high-quality academics are connected to strong relationships, and we see value in being in partnership with a child and their family from ages 3-11. In its early years, Opal Charter School operated one of only a few preschool programs within a charter school. We know that it is possible - albeit with many constraints - to open lottery spots for preK students. We are investigating whether the new publicly-funded Preschool for All program may allow us to offer a limited number of preK placements in the charter school lottery. We will investigate the possibility of a state waiver so that we can lottery children who are placed through the Preschool for All program into Opal Charter School.

## OPAL SCHOOL MISSION

*Opal School strengthens education by provoking fresh ideas concerning environments where creativity, imagination and the wonder of learning thrive.*

## OPAL SCHOOL VALUES

A powerful image of the young child as intelligent, creative and capable with gifts and abilities that the world needs.

A belief that children play a central role in their own learning, and that learning is central to the health of our democracy.

A deep respect for differences however they may be expressed, and a belief that diversity strengthens community.

A belief that listening, dialogue and exchange open doors to unimagined possibilities, and that school is where we learn to walk through them with courage.

A view that learning happens when people form relationships with one another, ideas, materials and the environment.

A belief in the rights of children, families and educators to participate together in forming and shaping rich environments of learning, challenge and choice.

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*The child has a hundred languages,  
a hundred hands, a hundred thoughts  
a hundred ways of thinking, of playing, of  
speaking ... and a hundred, hundred more.*

—Loris Malaguzzi

## **Opal School Guiding Principles**

Our guiding principles for teaching and learning keep the school a living and vital place. They are the core beliefs about teaching and learning from which all school experiences are born. No principle sits in isolation. Each is connected, influenced and shaped by the others. They support an instructional approach based on listening and relationships.

Our guiding principles are inspired and influenced by the early childhood schools of Reggio Emilia, Italy, research in the field of neuroscience, and constructivist practices in the United States and beyond.

### **Children as Protagonists**

Children are competent, resourceful and creative with imagination and curiosity about the world around them. They come to school full of experience and wisdom in their natural approaches to make meaning of their lives.

### **Children as Collaborators**

No child lives or learns in isolation. A child is always in search of relationships. Children learn and become themselves through interaction and relationships with other people, ideas, objects and symbols.

### **Children as Communicators**

Children make their thinking visible to us in many ways, including words, drawing, numbers, dance, painting, building, sculpture, shadow play, collage, drama, music and more. Children use many kinds of materials to discover and express what they know, understand, wonder, feel and imagine.

### **Children and Adults as Researchers & Co-Creators**

Our school is a learning community where children and adults collaborate as researchers to co-create and document experiences that have originated from their relationships, challenges and choices. Teachers are engaged in continuous discussion and dialogue. They collect raw data and use this information to plan, prepare, provoke, assess and inform the community of the school's practices, learning, and outcomes.

### **Families as Partners**

Family participation in the life of the school is essential and takes many forms. The exchange of ideas between families and teachers is vital to development of a learning community. Families have the potential to bring vitality and richness to the school by contributing distinctive life experiences and wisdoms.

### **Strong Academics Connected to Quality Relationships**

A strong academic program is best supported within a system of reciprocal relationships among people, ideas, the natural and built world, and the content and skills of the disciplines.

### **Culture of Respect**

Respectful agreements and boundaries support the need for physical and emotional safety and order as they are identified, discussed, practiced, and experienced within a culture of listening, dialogue, and exchange between children and adults.

### **Environment as Teacher**

The design and use of space encourages encounters, communication, and relationships. It informs children and adults about possibilities. There is order and beauty in the arrangement of space, equipment and materials.

### **Documentation as Communication**

Careful attention is given to the collective work of children and adults by transcribing dialogue, taking photographs, and making visible the ideas of children in many media. Documentation informs children, teachers, and the public of children's learning strategies, group learning processes, and learning outcomes. By making the powerful ideas of children visible to the public, children truly become citizens.

### **Organization as Foundational**

The well-designed use of space and organization of materials, schedules, and curriculum are essential to the creation of a school community, where creativity, imagination and learning thrive.

# GOALS AND EXPECTATIONS FOR OUR STUDENTS

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Discover, cultivate and express the joy and wonder of learning.

Develop an understanding and curiosity about multiple points of view. Have value and empathy for experiences and perspectives different from one's own.

Collaborate with others to construct ideas and create new knowledge.

Develop an understanding of our interdependent relationship with the natural world.

Take action as mindful citizens who care about making contributions to a future that acknowledges living systems as an integrated whole.

Develop strategies that contribute to the quality of the community by having a keen sense of place, identity and belonging, while respecting the rights and identities of others.

Read the world: Explore ideas and relationships; make connections between known and unknown information.

Use the written and spoken word with increasing proficiency to communicate ideas, relationships and understandings.

Uncover and communicate observations, questions, theories and ideas through skillful and imaginative uses of the languages of the arts and sciences, including mathematics.

Develop an appreciation of and capacity for accuracy, elegant design and efficiency.



## The Principles of Playful Inquiry

By Susan Harris MacKay

*Adapted from What About Play?: The Value of Investing in Child's Play  
by Susan Harris MacKay, 2010*

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### What is the role of adults in playful inquiry?

Our research practices at Opal School and at Portland Children's Museum have offered us the opportunity to observe, interpret, and reflect on countless interactions between children and the adults who are their caregivers. On any given day, we see children and grandparents, parents, caregivers, and extended families. We see our own volunteers and play-guides interacting with children who visit our museum exhibits and studios. We see children and their teachers in our preschool through fifth-grade classrooms. From this vantage point, and within the context of current research from the fields of the neurosciences, developmental psychology, and education, we've developed some ideas intended to support adults in their desire to be productive and inspiring companions to the children in their care.

We have found the following ideas help to guide adult interactions with children in playful inquiry.

#### Adults can...**Inspire Curiosity**

We have found that when adults pay attention to the interests of children, children get serious about learning. The more they expect to be listened to, the more curious they become about their experiences. Children come into the world wired to try and make sense of it. When we pay attention to the things that children seem to wonder about, learning becomes joyful - and a sense of wonder is established and sustained.

We encourage adults to listen to children and ponder questions together that neither of them knows the answers to. As noted Stanford professor Elliott Eisner

reminds us, “Unanswerable questions should be a source of comfort. They ensure that you will always have something to think about! But why do puzzlements provide satisfaction? Because they invite the most precious of human abilities to take wing. I speak of imagination, the neglected stepchild of American education.”

A curious mind is an alert mind, and one that is primed for learning. Alertness, focus and attention are the keys to developing strong pathways in the brain because the physiological process of developing those pathways relies on them (Merzenich, 2008; Neville, 2008). Children attend to meaning because it motivates and engages them. They benefit tremendously from the company of a curious, attentive adult who is willing to share his or her own meaning making process authentically and generously.

Adults have the opportunity to create environments that are as rich in possibilities for curiosity and discovery as an old growth forest or a beach at low tide. Classroom environments should encourage children to become lost in their play, and adults to let them.

Adults can remember to ... **Explore Playfully** .

Playfulness is an attitude of freedom, joy, possibility, and imagination. It is a quality of genius (Armstrong, 1998). An essential aptitude (Pink, 2005). In play, we have the opportunity to reinvent the world we find around us. Adults can offer children the opportunity to explore art, nature, mathematics, literature, geography, technology or anything else they want children to learn—and they can do it with a playful attitude.

During play, focus is often so intense that all sense of time is lost. A mind that has been playfully and freely associating is “primed to tackle new ideas” (Paley, 2005).

In playful inquiry, the idea isn’t so much to avoid or distract ourselves from reality as it is to find a personal way to interpret and make meaning of it. In play, our minds have the best opportunity to make meaning and connections because we are free from the consequence of mistakes and the fear of being

wrong. The pleasurable emotions associated with play relax our neural pathways and free them up for layered and multi-dimensional growth.

Adults encourage children to explore playfully when environments are thoughtfully prepared with playful inquiry in mind. But opportunities increase when adults approach their own work from a stance of playful exploration themselves. Adults can observe children with these questions in mind:

- What environments, experiences or materials elicit the greatest delight?
- What environments, experiences or materials sustain children's interests and play for the longest periods of time?
- What questions do children seem to be asking within the environment?
- What environments or experiences tend to invite the most collaboration between children?

Based on these observations, how can we create new possibilities for joy, wonder and inspiration?

Adults can support children to ... **Seek Connections.**

*A connection feels like a hole in your heart that has just been filled.*

—Olive, age 8

We have come to believe that the quality of our learning is determined by the quality of our relationships -- our ability to have them with others, and our ability to perceive them in our world. Without question, children benefit from the support of a caring adult who is willing to enter into a genuine relationship. Respect, trust, and love lay the foundation for the emotional state most conducive for the learning brain. But, equally important is the support we give to children for *seeing* relationships, patterns, and connections in the world. Definitions of creativity are hard to pin down, but all have a similar theme: crossing boundaries, seeing relationships other people haven't noticed, and the ability to make novel connections between old familiar parts (Pink, 2005; Rinaldi,

2005; Robinson, 2001). Playful inquiry thrives in an environment rich with possibilities for the arts, sciences, and language.

Creative work is play... The creative mind plays with the object it loves. Artists play with color and space. Musicians play with sound and silence. Children play with everything they can get their hands on.

—Stephen Nachmanovitch, 1990

There are many opportunities to support and encourage connections between children, teachers, families, materials, the natural world, and ideas. Connections are the building blocks that strengthen creativity and are one of the most powerful learning tools supported by playful inquiry. Adults invite children to discover connections and relationships when environments support children to slow down and get lost in their play. Important connections range from concrete and hands-on work with materials, to abstract ideas conveyed through themes and activities. Children may make connections with clay, blocks, or by manipulating a water flow. They make connections when they engage in spontaneous and improvisational theater in a dramatic play area. They make connections when they consider the many shades of green they can make with watercolor paint after spending time observing the ferns in the forest. They make connections when they experience big ideas between books and songs. Connections help create complex wiring in our brains.

In order to support children's innate drive to connect, see, and create relationships, adults can provide a child with loose parts (for example, blocks, found objects, natural materials), art materials and time to tinker. They can appreciate and encourage the use of metaphor. And adults can talk with children about what they see. They can marvel over and celebrate novel ideas, and delight in children's tremendous capacity to create them.

Adults can encourage children to ... **Share Stories.**

Stories are how we remember, how we think, how we communicate, how we understand. In his book, *The Literary Mind*, cognitive scientist Mark Turner writes, "Story is the fundamental instrument of thought" (in Pink, 2005, p. 101).

Opportunities for playful inquiry are enhanced within environments that contain abundant invitations for story making and story sharing. Stories are how we take the parts of our lives and make a meaningful whole.

Over time, in our memories, the story of our life becomes our life. Playful inquiry opens the door for that story to be defined by success and contentment. In 2002, psychologist Jerome Bruner told an audience in Reggio Emilia, Italy, that children learn the syntax of language in order to tell stories. It is important that we listen to them.

It is equally important that adults tell children their own stories. Adults can put children on their laps and transport them through time and space with those found in books. And when children grow too big adults can sit side by side, eye to eye, arm in arm – and keep the reading and telling of stories alive in a child's world.

*Remember this one thing, said Badger. The stories people tell have a way of taking care of them. If stories come to you, care for them. And learn to give them away where they are needed. Sometimes a person needs a story more than food to stay alive. That is why we put these stories in each other's memories. This is how people care for themselves.*

—Barry Lopez, Crow and Weasel (1998)

Open-ended environments such as dramatic play and block spaces, forts or other shelters, or child-sized versions of familiar places like grocery stores or doctors' offices, naturally lend themselves to rich storytelling and imagining.

Adults also have the opportunity to tell the stories of their own experience through the documentation of playful inquiry. By taking the time to photograph and narrate stories of experiences and observations, adults can make visible their professional interpretations of the importance of those experiences. Quotes, photographs, and narrative accounts have the effect of slowing down an event so that it is easier to appreciate. Moments of playful inquiry are filled with treasures to last a lifetime. Documentation offers adults a tool to stop motion, to shine a light on those treasures and to let them sparkle. When carefully displayed, these stories and photographs allow adults a concrete connection to the importance of play for the children they care for. As Badger

advises us to do—we can put these stories in each other’s memories. They will help us take care of ourselves.

Adults can ... **Nurture Empathy.**

Empathy is that incredible human capacity to imagine ourselves standing in someone else’s shoes. Empathy is what allows us to connect with other human beings and to experience the meaning and joy in knowing we are not alone. Empathy is what allows us to live by the golden rule. When we are empathetic to another’s experience, it is impossible to do what we would not have done to ourselves. The challenge to imagine other perspectives, to seek connection between our own stories and those of people whose experiences are very different from our own, is at the very heart of genuine inquiry and one of its most powerful uses. In her 2008 Harvard commencement address, the author of the Harry Potter series, JK Rowling, spoke of the power of empathy:

*Unlike any other creature on this planet, humans can learn and understand, without having experienced. They can think themselves into other people's minds, imagine themselves into other people's places.*

*... many prefer not to exercise their imaginations at all. They choose to remain comfortably within the bounds of their own experience, never troubling to wonder how it would feel to have been born other than they are. They can refuse to hear screams or to peer inside cages; they can close their minds and hearts to any suffering that does not touch them personally; they can refuse to know.*

*I might be tempted to envy people who can live that way, except that I do not think they have any fewer nightmares than I do. ... I think the willfully unimaginative see more monsters. They are often more afraid.*

*What is more, those who choose not to empathize may enable real monsters. For without ever committing an act of outright evil ourselves, we collude with it, through our own apathy.*

We enable healthy relationships when we support and encourage children’s social play and collaborative work. Adults can make emotions visible by naming

them and being curious about the behaviors associated with them. We can try to ask questions before we jump to conclusions. It makes sense to invest in a child's social and emotional intelligence as an integral and vital part of creativity, intellect, and healthy development. Adults model caring by listening to children, and asking questions about the interpretations he or she makes of experiences. Adults can talk with children about the things they care about and let children see what it looks like to take action on behalf of those things. Adults provide critical support for children to build awareness of unfairness in this world and for helping a child learn to cope with and respond to it appropriately.

*No human being can achieve his full potential if his creativity is stunted in childhood. And no nation can thrive in the 21<sup>st</sup> century without a highly creative and innovative workforce. Nor will democracy survive without citizens who can form their own independent thoughts and act on them.*

*-Miller and Almon*

If the guiding principles for supporting and promoting playful inquiry seem pretty simple, and maybe even a little old-fashioned, it's because they are. As it turns out, these simple things—telling stories, connecting with one another, being curious about the world, seeking meaning, and even being good to one another (Goleman), are hard-wired into our species. In other words, we're not broken—but some of our current systems most certainly are. In our efforts to organize, industrialize, strategize, standardize—we've lost our way, and we've obscured the creative birthright of many who've happened along. Placing a value on our natural learning strategies in our communities and our institutions will help shift our culture towards a sustainable future.

To be responsive to a child's innate sense of wonder is to help choreograph a life-long dance with the world that we experience and create as we live out our lives. Environments steeped in playful inquiry support children to grow into adults who have an understanding of their own capacities—whose minds have richly developed pathways layered with possibilities for new and flexible connections. These are minds that can solve complex problems, invent novel solutions, imagine another's perspective, and communicate with confidence and competence. These are the kinds of minds that create peaceful, sustainable, and happy communities.

For those who would be neuroscientists, a love of mathematics and technology (and time to play) might lead to the kinds of studies that are beginning to connect the relationships between the use of the arts and general cognition. Such scientists are finding that the study of music and drama support strong neural strategies for long-term memory (Jonides, 2008). Others have found connections between the study of music and the development of attention (Neville, 2008). Still others have found that genetic pre-dispositions to certain art forms lead to high interest and competence in those art forms (Posner, 2008). In other words, it turns out that Nachmanovitch was right: the creative mind plays with the object it loves (1990).

For those who would be educators, a love of learning (and time to play) might lead to the kind of recognition that Elliot Eisner makes visible when he writes:

*The aim of education ought to be conceived as the preparation of artists...individuals who have developed the ideas, the sensibilities, the skills and the imagination to create work that is well proportioned, skillfully executed, and imaginative, regardless of the domain in which an individual works. The highest accolade we can confer upon someone is to say that he or she is an artist whether as a carpenter or a surgeon, a cook or an engineer, a physicist, or a teacher. The fine arts have no monopoly on the artistic.*

For those who would be poets, a love of words (and time to play) might lead to the kind of questions Mary Oliver posed in her poem, *The Summer Day*:

*Tell me, what else should I have done?  
Doesn't everything die at last, and too soon?  
Tell me, what is it you plan to do  
with your one wild and precious life?*

Or the advice that 10-year-old Byron offers in his poem:

*Curiosity Killer  
Curiosity should not be killed.  
It's made to ponder, to explore.  
Get to a place  
Where your mind can wander.  
Ponder the unpondered  
Questions.*

Both poets invite us into a playful inquiry that inspires us to muse on our opportunities and our choices. What are we willing to imagine? To wonder? To dream?

*There is a vitality, a life force, an energy, a quickening, that is translated through you into action, and because there is only one of you in all time, this expression is unique. And if you block it, it will never exist through any other medium and will be lost.*

Martha Graham, Dancer and Choreographer  
in Nachmanovitch

Playful inquiry is the means to tapping into a child's energy, and unblocking every child's capacity for expression. When learning environments promote playful inquiry, our communities will benefit from the voices of children now, and launch into the future citizens that have the creativity, the curiosity, and the care to live happy, healthy lives with one another.

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# Overview of Reading Developmental Continuum

Beyond the Roleplay phase the children are said to be working in a particular phase when the Global Statement and Key Indicators represent the best fit with the child's behaviours and beliefs. Children need not display all key indicators to be placed in a phase, the placement rests upon the teacher's professional judgement.

## Phases

### Phase 1: Role Play Reading

In this phase readers display reading-like behaviour as they reconstruct stories for themselves. They show a natural interest in books and the language of print.

### Phase 2: Experimental Reading

In this phase readers use memory of familiar texts to match some spoken words and written words. They realise that print contains a constant message and begin pointing to words. They may comment on pictures, but seldom question written text.

### Phase 3: Early Reading

In this phase readers may read unfamiliar texts slowly and deliberately as they focus on reading exactly what is on the page. Readers are beginning to reflect on their own strategies, e.g. for working out unknown words. They sometimes comment on and question texts.

### Phase 4: Transitional Reading

In this phase readers are beginning to integrate a range of reading strategies to make meaning. They are becoming more confident in using a variety of strategies to identify and comprehend words. They are able to adapt their reading to different types of text. Readers in this phase enjoy challenges, e.g. "I'm going to read this hard book. I like lots of hard words." Although books may influence their thinking, they may not be consciously aware of this. With teacher support they will comment on and criticise texts.

### Phase 5: Independent Reading

Reading is purposeful and automatic. Readers are only aware of reading strategies being employed when encountering difficult text or reading for a specific purpose. Readers have greater ability to make connections between what is current knowledge and what is new. They may challenge texts, drawing on evidence from their own experience.

Phase 6: Advanced Reading

## Key Indicators

- displays reading-like behaviour
  - holding the book the right way up
  - turning the pages appropriately
  - looking at words and pictures
  - using pictures to construct ideas
- realises that print carries a message but may read the writing differently each time, e.g. when 'reading' scribble to parents
- focuses on the meaning of a television program, story, or other text viewed, listened to or 'read'. Responses reflect understanding.
- makes links to own experience when listening to or 'reading' books, e.g. points to illustration, saying 'My dog jumps up too.'
- uses pictorial and visual cues when watching television, listening to or 'reading' stories, i.e. talks about a television program, advertisement or picture in a magazine or book, relating it to own knowledge and experience
- recognises own name, or part of it, in print

- realises that print contains a constant message, i.e. that the words of a written story remain the same, but the words of an oral story may change
- is focused on expressing the meaning of a story rather than on reading words accurately
- uses prior knowledge of context and personal experience to make meaning, e.g. uses memory of a text to match spoken with written words
- recognises some personally significant words in context, e.g. in job roster, weather chart or books
- matches some spoken words with written words when reading a book or environmental print

- is beginning to read familiar texts confidently and can retell major content from visual and printed texts, e.g. language experience recounts, shared books, simple informational texts and children's television programs
- can identify and talk about a range of different text forms such as letters, lists, recipes, stories, newspaper and magazine articles, television dramas and documentaries
- demonstrates understanding that all texts, both narrative and informational, are written by authors who are expressing their own ideas
- may read word-by-word or line-by-line when reading an unfamiliar text, i.e. reading performance may be word centred. Fluency and expression become stilted as the child focuses on decoding
- uses pictures cues and knowledge of context to check understanding of meaning
- has a bank of words which are recognised when encountered in different contexts, e.g. in a book, on the blackboard, in the environment or on a chart
- relies heavily on beginning letters and sounding-out for word identification (graphophonic strategies)

- shows an ability to construct meaning by integrating knowledge of:
  - text structure, e.g. letter, narrative, report, recount, procedure
  - text organisation, e.g. paragraphs, chapters, introduction, conclusion, contents, page, index
  - language features, e.g. descriptive language connectives such as because, therefore, if... then
  - subject specific language, e.g. the language of reporting in science and the language of a journalistic report
- can retell and discuss own interpretation of texts read or viewed with others, providing information relating to plot and characterisation in narrative or to main ideas and supporting detail in informational text
- recognises that characters can be stereotyped in a text, e.g. a mother looking after children at home, while the father goes out to work or a prince rescuing a helpless maiden from an evil stepmother, and discusses how this could be changed
- selects appropriate material and adjusts reading strategies for different texts and different purposes, e.g. skimming to search for a specific fact; scanning for a key word

- is becoming efficient in using most of the following strategies for constructing meaning:
  - makes predictions and is able to substantiate them
  - self-corrects when reading
  - re-reads to clarify meaning
  - reads-on when encountering a difficult text
  - slows down when reading difficult texts
  - substitutes familiar words
  - uses knowledge of print conventions
- makes meaningful substitutions, i.e. replacement miscues are meaningful, e.g. 'cool' drink for 'cold' drink. The integration of the three cuing systems (semantic, syntactic and graphophonic) is developing
- has an increasing bank of sight words, including some difficult and subject-specific words, e.g. science, experiment, February, Christmas
- is becoming efficient in the use of the following word identification strategies for constructing meaning:
  - sounds-out to decode words
  - uses initial letters as a cue to decoding
  - uses knowledge of common letter patterns to decode words, e.g. th, tion, scious, ough
  - uses known parts of words to make sense of the whole word
  - uses blending to decode words, e.g. str-ing
  - uses word segmentation and syllabification to make sense of whole word
- is able to talk about some of the strategies for making meaning.

- can recognise and discuss the elements and purposes of different text structures, e.g. reports, procedures, biographies, narratives, advertisements, dramas, documentaries
- reads and comprehends text that is abstract and removed from personal experience
- makes inferences based on implicit information drawn from a text and can provide justification for these inferences
- returns purposefully to make connections between widely separated sections of a text
- makes critical comparisons between texts
- can discuss an alternative reading of a text and offer possible reasons why a text may be interpreted differently by different readers or viewers
- uses a range of strategies automatically when constructing meaning from text
  - self-corrects
  - re-reads
  - reads-on
  - slows down
  - sub-vocalises
- uses word identification strategies appropriately and automatically when encountering an unknown word
  - knowledge of graphophonics
  - knowledge of word patterns
  - knowledge of word derivations morphographs, prefixes, suffixes and syllabification

### Major Teaching Emphases

- encourage discussion and praise critical and divergent thinking
- provide picture books with limited text that children can 'read' to themselves and others
- re-read favourite stories and rhymes
- share 'Big Books' with children incidentally modelling reading behaviours
- establish a language-rich environment, presenting print in natural and meaningful contexts
- read from an enlarged text (big book) so that children can follow the print as it is read
- read texts featuring rhyme, rhythm and repetition

As the opportunities arise:

- show that a written word is a unit of print with space either side
- talk about letters by name, relating initial letters to the sounds they represent
- show that print is written left to right and top to bottom
- relate spoken to written words in context
- draw attention to relationships between words and pictures
- demonstrate use of context cues to construct meaning

### Major Teaching Emphases

- share with children times when you challenge or disagree with a text
- discuss instances of stereotyping in texts
- value and encourage both critical and empathetic responses from children, especially those that are different from your own
- Before, during and after reading promote discussion that goes beyond the literal level
- provide opportunities for children to retell stories
- use environmental print purposefully each day
- select reading material that is predictable, familiar and has natural repetition
- discuss conventions of print informally when reading
- model reading strategies such as predicting words and reading-on
- involve children in oral cloze activities focusing on words
- talk about letters and words in context, pointing out distinctive features
- encourage children to explore letter-sound relationships

### Major Teaching Emphases

- ask readers about ideas and information they have found in books. Encourage a range of opinions and reactions, discuss stereotypes and generalisations
- provide opportunities for individual conferences where students discuss aspects of their reading
- provide opportunities for students to demonstrate understanding of a text
- encourage students to reflect on personal reading strategies
- model strategies such as substituting, re-reading, and self-correcting during shared reading sessions
- Encourage use of personal experiences, knowledge of oral language patterns and text structure to help readers make meaning
- model strategies for attacking unknown words, e.g. identifying similar word beginnings, common word patterns, chunking parts of a word
- support the development of a basic sight vocabulary by:
  - selecting resources that use many of these words in a natural way
  - encouraging readers to re-read favourite books
  - scribing the students' own language and using this text to focus on basic sight words
  - developing class word banks containing topic words, high frequency words, linking words etc.

### Major Teaching Emphases

- create a climate which fosters critical thinking
- help students to be aware of the view of the world presented by an author and how this affects different people
- discuss with students the effect of texts on their own attitudes and perceptions
- ensure that students read a range of texts for a variety of purposes
- discuss the use of prior knowledge of:
  - the text topic
  - text structures
  - language appropriate for different text types
- Provide opportunities for:
  - making comparisons with other texts
  - identifying the main issues in a text and providing supporting detail
  - identifying cause and effect and predicting outcomes
  - identifying character traits from textual cues
  - analysing plots
  - interpreting symbolic or metaphorical meaning
  - discussing concepts and vocabulary
  - extracting and organising information

- Model and discuss
  - prediction and confirmation strategies
  - use of syntactic and semantic cues
  - use of picture cues
  - use of context cues
  - re-reading
  - reading-on
  - substituting words
- Model and discuss word identification strategies:
  - use of graphophonic knowledge and 'sounding-out'
  - blending
  - letter and word patterns
  - sight words
  - using syllabification and segmentation
  - using knowledge of root words and word components

### Major Teaching Emphases

- teach students to:
  - articulate their reading difficulties
  - discuss the questions they asked of the text and any questions that weren't answered
  - discuss how they solved problems
  - select and use appropriate strategies when reading for different purposes
- praise and encourage students when they show evidence of critical reading, listening and responding sensitively to their comments
- teach students to identify and comment on differing points of view in texts
- establish a language-rich environment presenting print in natural and meaningful contexts
- provide opportunities for students to examine, analyse and discuss narrative and expository texts
- teach students to:
  - analyse topics/questions
  - generate self-questions
  - select appropriate texts and compile reference lists
  - summarise and take notes
  - organise responses for reporting
  - compile bibliographies
- develop the students' ability to read from a writer's viewpoint and to write from a reader's viewpoint

### At all phases:

- foster children's enjoyment of reading, encouraging them to explore a variety of texts and take risks with confidence
- read to students every day and share your own enjoyment of reading
- encourage students to respond critically to texts they have read or viewed
- model reading behaviours and strategies for students to emulate
- encourage students to select their own books and read independently every day
- encourage students to share experiences related to reading and viewing
- talk to students about their reading and viewing
- provide opportunities for students to write every day for different purposes and audiences



## Overview of the *First Steps* Writing Map of Development

Global Statement	Role Play Phase	Experimental Phase	Early Phase	Transitional Phase
Key Indicators	<p>In this phase, writers emulate adult writing by experimenting with marks to represent written language. Role Play writers are beginning to understand that writing is used to convey meaning or messages; however, as understandings about sound-symbol relationships are yet to develop, their messages are not readable by others. Role Play writers rely heavily on topic knowledge to generate text.</p> <p><b>USE OF TEXTS</b></p> <ul style="list-style-type: none"> <li>Assigns a message to own written and drawn symbols</li> <li>Demonstrates awareness that writing and drawing are different</li> <li>Knows that print carries a message, but may read writing differently each time</li> </ul> <p><b>CONTEXTUAL UNDERSTANDING</b></p> <ul style="list-style-type: none"> <li>States purpose or audience for own writing, e.g., This is a card for Dad.</li> <li>Identifies and talks about characters from literary texts</li> <li>Identifies and talks about people and ideas in informational texts</li> </ul> <p><b>CONVENTIONS</b></p> <ul style="list-style-type: none"> <li>Begins to demonstrate an awareness of directionality, e.g., points to where print begins</li> <li>Uses known letters or approximations of letters to represent writing</li> </ul> <p><b>PROCESSES AND STRATEGIES</b></p> <ul style="list-style-type: none"> <li>Relies upon personal experiences as a stimulus for writing</li> </ul>	<p>In this phase, writers are aware that speech can be written down. Experimental writers rely on familiar topics to generate a variety of texts, such as greeting cards, lists, and letters. They demonstrate an understanding of one-to-one correspondence by representing most spoken words in their written texts. These words may consist of one, two, or three letters, and reflect their developing understanding of sound-symbol relationships.</p> <p><b>USE OF TEXTS</b></p> <ul style="list-style-type: none"> <li>Experiments with familiar forms of writing, e.g., lists, captions, retellings</li> <li>Uses writing with the intention of communicating a message</li> <li>Demonstrates awareness that print contains a constant message, e.g., recalls the gist of the message over time</li> <li>With assistance, finds information in texts appropriate to purpose or interest</li> </ul> <p><b>CONTEXTUAL UNDERSTANDING</b></p> <ul style="list-style-type: none"> <li>Provides reasons why people write, e.g., to remember, to say thank you.</li> <li>States the purpose and audience of own writing, e.g., I am going to write to Grandma to say...</li> <li>Talks about how characters and events are represented in literary texts</li> <li>Talks about how people and ideas are represented in informational texts</li> </ul> <p><b>CONVENTIONS</b></p> <ul style="list-style-type: none"> <li>Writes using simple language structures, e.g., I like..., I see...</li> <li>Demonstrates one-to-one correspondence between written and spoken word, e.g., word-pointing when reading back own writing</li> <li>Begins to demonstrate understanding of the conventions of print</li> <li>Identifies the letters of the alphabet by name or by common sounds</li> </ul> <p><b>PROCESSES AND STRATEGIES</b></p> <ul style="list-style-type: none"> <li>Draws upon semantic, graphophonic, and syntactic knowledge when writing, e.g., topic knowledge, sound-symbol relationships</li> <li>Uses a limited range of strategies throughout the writing process, e.g., connecting</li> <li>Uses a limited range of strategies to spell, e.g., sounding out</li> <li>Decides how own text will be presented</li> </ul>	<p>Early writers produce a small range of texts that exhibit some of the conventions of writing. Texts, such as retellings, reports, and e-mails, are composed to share experiences, information, or feelings. Early writers have a small bank of frequently used words that they spell correctly. When writing unknown words, they choose letters on the basis of sound, without regard for conventional spelling patterns.</p> <p><b>USE OF TEXTS</b></p> <ul style="list-style-type: none"> <li>Attempts a small range of familiar texts, either teacher directed or self selected</li> <li>With assistance, finds information in texts and records through drawing or writing key words</li> </ul> <p><b>CONTEXTUAL UNDERSTANDING</b></p> <ul style="list-style-type: none"> <li>Explains the purpose of a small range of familiar text forms, e.g., jokes are to entertain</li> <li>Talks about the purpose of a piece of writing and the ideas that need to be included</li> <li>Explains why characters or events are represented in a particular way when composing literary texts</li> <li>Explains why people or ideas are represented in a particular way when composing informational texts</li> <li>Imitates the use of simple devices used in texts, e.g., print size, colour</li> </ul> <p><b>CONVENTIONS</b></p> <ul style="list-style-type: none"> <li>Experiments with words drawn from a variety of sources, e.g., literature, media, oral language of peers</li> <li>Spells and uses a small bank of known words correctly</li> <li>Knows all letters by name and their common sounds</li> <li>Knows simple letter patterns and the sounds they represent, e.g., sh, ch, ee</li> <li>Writes simple sentences using correct punctuation</li> </ul> <p><b>PROCESSES AND STRATEGIES</b></p> <ul style="list-style-type: none"> <li>Draws upon semantic, graphophonic, and syntactic knowledge when writing, e.g., text organization, word order</li> <li>Uses a small range of strategies throughout the writing process, e.g., self-questioning</li> <li>Uses a small range of strategies to spell unknown words, e.g., chunking, sounding out</li> <li>Talks or draws as a means of planning before writing</li> <li>Begins to edit and proofread own writing when directed, e.g., deleting words, adding punctuation</li> <li>Creates a published text that is beginning to reflect the intended purpose</li> </ul>	<p>Transitional writers show increasing control over the conventions of writing such as punctuation, spelling, and text organization. They consider audience and purpose when selecting ideas and information to be included in texts. They compose a range of texts, including explanations, narratives, brochures, and electronic presentations. Writing shows evidence of a bank of known words that are spelled correctly. Transitional writers are moving away from a heavy reliance on sounding out and are beginning to integrate visual and meaning-based strategies to spell unknown words.</p> <p><b>USE OF TEXTS</b></p> <ul style="list-style-type: none"> <li>Composes a range of texts, but may not fully control all elements</li> <li>Composes texts by finding, recording, and organizing information appropriate to purpose</li> </ul> <p><b>CONTEXTUAL UNDERSTANDING</b></p> <ul style="list-style-type: none"> <li>Explains the purpose and audience of a range of text forms</li> <li>Selects ideas to include in own text to suit purpose and audience</li> <li>Discusses alternatives about how to represent characters and events when composing literary texts</li> <li>Discusses alternatives about how to represent people and ideas when composing informational texts</li> <li>Experiments with the use of devices, e.g., repetition of words or phrases</li> </ul> <p><b>CONVENTIONS</b></p> <ul style="list-style-type: none"> <li>Varies vocabulary to add interest</li> <li>Spells and uses an increasing bank of known words correctly</li> <li>Knows less common letter patterns and the sounds they represent, e.g., tion, ph</li> <li>Writes a variety of simple and compound sentences, using correct punctuation</li> <li>Groups related information, sometimes without regard for paragraphing conventions</li> </ul> <p><b>PROCESSES AND STRATEGIES</b></p> <ul style="list-style-type: none"> <li>Draws upon semantic, graphophonic, and syntactic knowledge when writing, e.g., vocabulary knowledge, text-structure knowledge</li> <li>Uses an increasing range of strategies throughout the writing process, e.g., determining importance</li> <li>Uses an increasing range of strategies to spell unknown words, e.g., using visual memory</li> <li>Begins to organize ideas before writing, e.g., brainstorming, drawing, jotting</li> <li>Revises, edits, and proofreads own writing when directed</li> <li>Plans for and creates a published text that reflects the intended purpose and needs of the audience</li> </ul>
Major Teaching Emphases	<p><b>ENVIRONMENT AND ATTITUDE</b></p> <ul style="list-style-type: none"> <li>Create a supportive classroom environment that nurtures a community of writers.</li> <li>Foster students' enjoyment of writing.</li> <li>Encourage students to experiment with different facets of writing, e.g., using known letters, composing messages.</li> <li>Encourage students to value writing as a social practice.</li> </ul> <p><b>USE OF TEXTS</b></p> <ul style="list-style-type: none"> <li>Expose students to a range of text forms pointing out purpose, e.g., recipes tell how to make something.</li> <li>Provide opportunities for students to write a range of texts for authentic purposes and audiences.</li> <li>Model the connection between oral and written language, e.g., what is said can be written down.</li> <li>Demonstrate that written messages remain constant.</li> <li>Foster students' sense of voice and individual writing style.</li> <li>Teach students the metalanguage associated with writing, and encourage its use.</li> </ul> <p><b>CONTEXTUAL UNDERSTANDING</b></p> <ul style="list-style-type: none"> <li>Discuss that writing has a purpose and an intended audience.</li> <li>Draw students' attention to decisions writers make when composing texts.</li> <li>Draw students' attention to the way characters are represented in literary texts.</li> <li>Draw students' attention to the way people and ideas are represented in informational texts.</li> </ul> <p><b>CONVENTIONS</b></p> <ul style="list-style-type: none"> <li>Provide opportunities for students to develop and use new vocabulary.</li> <li>Begin to build the bank of words students can automatically spell and use, e.g., personally significant words.</li> <li>Build phonological awareness and graphophonic knowledge, such as             <ul style="list-style-type: none"> <li>recognizing, matching, and generating rhymes</li> <li>listening for sounds in words</li> <li>linking letter names with their sounds, focusing on the regular sound</li> </ul> </li> <li>Teach students the conventions of print.</li> <li>Model one-to-one correspondence between written and spoken words.</li> <li>Model the composition of simple sentences, including the use of punctuation, e.g., capital letters, periods.</li> </ul> <p><b>PROCESSES AND STRATEGIES</b></p> <ul style="list-style-type: none"> <li>Build students' semantic, graphophonic, and syntactic knowledge, e.g., topic knowledge, sound-symbol relationships.</li> <li>Teach strategies used throughout the writing process, e.g., connecting.</li> <li>Teach spelling strategies, e.g., sounding out.</li> <li>Model simple publishing alternatives, e.g., text and illustration.</li> <li>Model how to find required information in texts.</li> <li>Model how to reflect on the writing process and products, and encourage students to do the same.</li> </ul>	<p><b>ENVIRONMENT AND ATTITUDE</b></p> <ul style="list-style-type: none"> <li>Create a supportive classroom environment that nurtures a community of writers.</li> <li>Foster students' enjoyment of writing.</li> <li>Encourage students to experiment with different facets of writing, e.g., spelling, composing sentences.</li> <li>Encourage students to value writing as a social practice.</li> </ul> <p><b>USE OF TEXTS</b></p> <ul style="list-style-type: none"> <li>Continue to expose students to a range of text forms, pointing out purpose and audience.</li> <li>Provide opportunities for students to compose a range of texts for authentic purposes and audiences.</li> <li>Foster students' sense of voice and individual writing style.</li> <li>Continue to teach students the metalanguage associated with writing, and encourage its use.</li> </ul> <p><b>CONTEXTUAL UNDERSTANDING</b></p> <ul style="list-style-type: none"> <li>Discuss the purpose and audience of a range of text forms.</li> <li>Discuss some of the decisions writers make when composing texts, and provide opportunities for students to do the same.</li> <li>Draw students' attention to the different ways characters or events are represented in literary texts.</li> <li>Draw students' attention to the different ways people or ideas are represented in informational texts.</li> <li>Highlight and encourage the use of simple devices that writers use to influence readers, e.g., print size, colour.</li> </ul> <p><b>CONVENTIONS</b></p> <ul style="list-style-type: none"> <li>Provide opportunities for students to develop and use new vocabulary.</li> <li>Continue to build the bank of words students can automatically spell and use, e.g., high-frequency words.</li> <li>Build students' knowledge about words and word parts, e.g., plurals.</li> <li>Continue to build phonological awareness and graphophonic knowledge, such as             <ul style="list-style-type: none"> <li>segmenting words into sounds</li> <li>linking letters with their regular sounds</li> <li>representing sounds heard in words with letters written in the order they are heard</li> <li>recognizing that the same letter represents different sounds</li> </ul> </li> <li>Reinforce conventions of print.</li> <li>Teach the use of commonly used punctuation, e.g., question marks, exclamation marks.</li> <li>Teach the use of parts of speech, e.g., nouns, verbs.</li> <li>Demonstrate the construction of sentences as units of meaning.</li> <li>Model how to group information that is related to compose a text.</li> <li>Begin to build students' knowledge about different text forms, e.g., procedures instruct, procedures have steps.</li> </ul> <p><b>PROCESSES AND STRATEGIES</b></p> <ul style="list-style-type: none"> <li>Continue to build students' semantic, graphophonic, and syntactic knowledge, e.g., word order, text organization.</li> <li>Continue to teach strategies used throughout the writing process, e.g., self-questioning.</li> <li>Continue to teach spelling strategies, e.g., chunking.</li> <li>Model simple ways to plan for writing, e.g., talking, drawing.</li> <li>Model simple ways to edit and proofread, e.g., adding words or punctuation.</li> <li>Continue to model simple publishing alternatives, highlighting purpose.</li> <li>Model how to find, record, and organize information from texts, e.g., alphabetical order, simple retrieval chart.</li> <li>Model how to reflect on the writing process and products, and encourage students to do the same.</li> </ul>	<p><b>ENVIRONMENT AND ATTITUDE</b></p> <ul style="list-style-type: none"> <li>Create a supportive classroom environment that nurtures a community of writers.</li> <li>Foster students' enjoyment of writing.</li> <li>Encourage students to experiment with different facets of writing, e.g., planning, editing, spelling.</li> <li>Encourage students to value writing as a social practice.</li> </ul> <p><b>USE OF TEXTS</b></p> <ul style="list-style-type: none"> <li>Continue to expose students to a range of text forms, and discuss the features of each.</li> <li>Provide opportunities for students to compose a range of texts for authentic purposes and audiences.</li> <li>Foster students' sense of voice and individual writing style.</li> <li>Continue to teach students the metalanguage associated with writing, and encourage its use.</li> </ul> <p><b>CONTEXTUAL UNDERSTANDING</b></p> <ul style="list-style-type: none"> <li>Discuss the purpose and audience of a range of text forms.</li> <li>Continue to discuss some of the decisions writers make when composing texts, and provide opportunities for students to do the same.</li> <li>Encourage students to make choices about how to represent characters and events when composing literary texts.</li> <li>Encourage students to make choices about how to represent people and ideas when composing informational texts.</li> <li>Model and encourage the use of devices, and discuss how they influence meaning.</li> <li>Model to teach students how to use writing to influence change about social issues that concern them.</li> </ul> <p><b>CONVENTIONS</b></p> <ul style="list-style-type: none"> <li>Provide opportunities for students to develop, refine, and use new vocabulary.</li> <li>Continue to build the bank of words students can automatically spell and use, e.g., topic words, signal words.</li> <li>Build students' knowledge about words and word parts, e.g., contractions, suffixes.</li> <li>Continue to build phonological awareness and graphophonic knowledge, such as             <ul style="list-style-type: none"> <li>representing the same sound with different letters or letter combinations, e.g., beach, me, ski, thief</li> <li>representing different sounds with the same letters or letter combinations, e.g., enough, though, through</li> </ul> </li> <li>Continue to teach the use of punctuation, e.g., commas.</li> <li>Continue to teach the parts of speech and their relationships, e.g., subject-verb agreement.</li> <li>Teach students to construct and manipulate sentences, e.g., expanding, reducing, transforming.</li> <li>Model how to group together sentences with similar information.</li> <li>Continue to build knowledge of different text forms, emphasizing:             <ul style="list-style-type: none"> <li>purpose, e.g., reports describe</li> <li>text structure, e.g., reports list details</li> <li>text organization, e.g., reports use headings</li> <li>language features, e.g., reports use present tense</li> </ul> </li> </ul> <p><b>PROCESSES AND STRATEGIES</b></p> <ul style="list-style-type: none"> <li>Continue to build students' semantic, graphophonic, and syntactic knowledge, e.g., grammatical knowledge, cultural knowledge.</li> <li>Continue to teach strategies used throughout the writing process, e.g., determining importance.</li> <li>Continue to teach spelling strategies, e.g., using visual memory.</li> <li>Teach students to plan for writing in a variety of ways, e.g., brainstorming, classifying.</li> <li>Teach students how to use editing and proofreading to refine their writing.</li> <li>Continue to model a variety of publishing alternatives, highlighting the purpose and audience.</li> <li>Teach students how to find, record, and organize information from texts, e.g., note making, note taking.</li> <li>Model how to reflect on the writing process and products, and encourage students to do the same.</li> </ul>	<p><b>ENVIRONMENT AND ATTITUDE</b></p> <ul style="list-style-type: none"> <li>Create a supportive classroom environment that nurtures a community of writers.</li> <li>Foster students' enjoyment of writing.</li> <li>Encourage students to experiment with different facets of writing, e.g., new forms, devices, vocabulary.</li> <li>Encourage students to value writing as a social practice.</li> </ul> <p><b>USE OF TEXTS</b></p> <ul style="list-style-type: none"> <li>Continue to expose students to a range of text forms, and discuss the features of each.</li> <li>Provide opportunities for students to craft a range of texts for authentic purposes and audiences.</li> <li>Foster students' sense of voice and individual writing style.</li> <li>Continue to teach students the metalanguage associated with writing, and encourage its use.</li> </ul> <p><b>CONTEXTUAL UNDERSTANDING</b></p> <ul style="list-style-type: none"> <li>Discuss some of the reasons writers choose one particular text form over others.</li> <li>Encourage students to explain their decisions about             <ul style="list-style-type: none"> <li>text form selected</li> <li>information and ideas included or omitted</li> <li>language used</li> </ul> </li> <li>Teach students how to represent characters and events to create specific effects in literary texts.</li> <li>Teach students how to represent people and ideas to create specific effects in informational texts.</li> <li>Teach students the use of devices, and discuss how they may influence the audience, e.g., flashback, illustration size.</li> <li>Encourage students to use writing to influence change about social issues that concern them.</li> <li>Discuss how writers' knowledge, experiences, and perspectives influence the composition of a text.</li> </ul> <p><b>CONVENTIONS</b></p> <ul style="list-style-type: none"> <li>Provide opportunities for students to develop, refine, and use new vocabulary.</li> <li>Continue to build the bank of words students can automatically spell and use, e.g., less common words, subject-specific words.</li> <li>Continue to build students' knowledge about words and word parts, e.g., prefixes, suffixes, homophones.</li> <li>Continue to build students' graphophonic knowledge, such as using less common sound-symbol relationships, e.g., ogan, nation, fashion.</li> <li>Extend students' knowledge of the use of punctuation, e.g., apostrophes, quotation marks.</li> <li>Extend students' knowledge and use of parts of speech and their relationships, e.g., noun-pronoun agreement.</li> <li>Teach students to construct and manipulate a variety of sentences, e.g., using conjunctions, using phrases and clauses.</li> <li>Teach students how to group sentences about similar information together to form a paragraph.</li> <li>Continue to build knowledge of different text forms, emphasizing             <ul style="list-style-type: none"> <li>purpose, e.g., explanations explain phenomena</li> <li>text structure, e.g., explanations use cause and effect</li> <li>text organization, e.g., explanations include diagrams or cutaways</li> <li>language features, e.g., explanations use signal words to show cause/effect</li> </ul> </li> </ul> <p><b>PROCESSES AND STRATEGIES</b></p> <ul style="list-style-type: none"> <li>Continue to build students' semantic, graphophonic, and syntactic knowledge, e.g., world knowledge, linguistic features.</li> <li>Continue to teach strategies used throughout the writing process, e.g., synthesizing.</li> <li>Continue to teach spelling strategies, e.g., using analogy.</li> <li>Continue to teach students to plan for writing in a variety of ways, e.g., storyboards.</li> <li>Continue to teach students how to use revising, editing, and proofreading to refine their writing.</li> <li>Encourage students to select and use publishing formats that best suit purpose and audience, e.g., Web page, slide show, poster.</li> <li>Continue to teach students to find, record, and organize information from texts, e.g., using graphic organizers.</li> </ul>





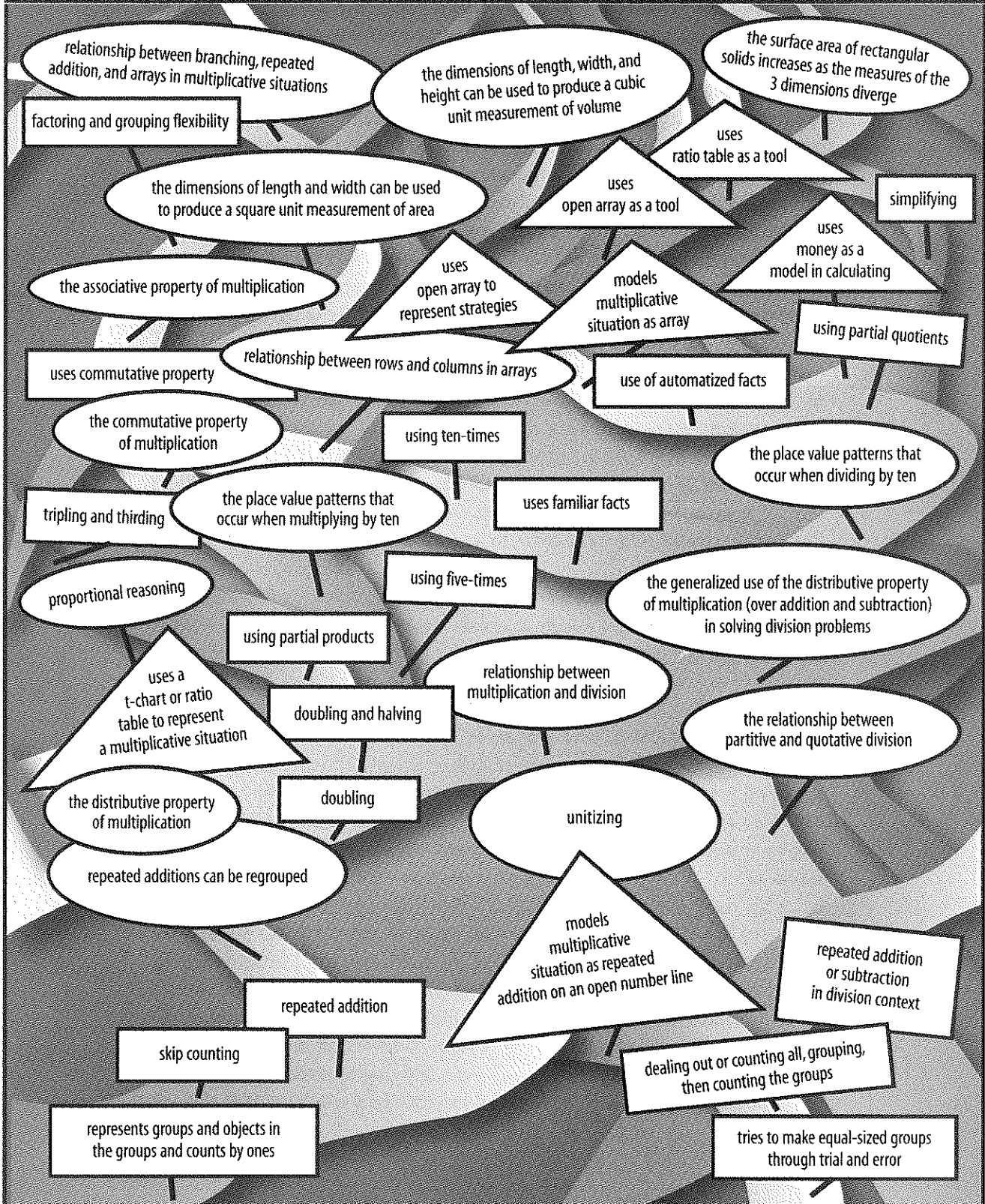
# Overview of the *First Steps* Writing Map of Development

Global Statement	Conventional Phase	Proficient Phase	Accomplished Phase
Key Indicators	<p>Conventional writers demonstrate control over the conventions of writing and most components of the writing process. While composing, they take responsibility for adjusting the language and content to suit specific audiences and purposes. Conventional writers craft a variety of literary and informational texts, such as biographies, Web pages, and documentary scripts. In this phase, writers use an increasing bank of known words and select from a wide vocabulary. They integrate a range of strategies to spell unknown words.</p> <p><b>USE OF TEXTS</b></p> <ul style="list-style-type: none"> <li>♦ Crafts a wide range of texts, demonstrating control over all elements</li> <li>♦ Composes texts by retrieving, recording, and organizing information appropriate to purpose and audience</li> </ul> <p><b>CONTEXTUAL UNDERSTANDING</b></p> <ul style="list-style-type: none"> <li>♦ Explains why a particular text form may be more appropriate to achieve a purpose for an intended audience</li> <li>♦ Adjusts the language and ideas to include in own texts to suit purpose and audience</li> <li>♦ Selects ways to represent characters and events to create specific effects in literary texts</li> <li>♦ Selects ways to represent people and ideas to create specific effects in informational texts</li> <li>♦ Uses devices when attempting to influence the reader, e.g., humour</li> </ul> <p><b>CONVENTIONS</b></p> <ul style="list-style-type: none"> <li>♦ Selects vocabulary to create precise meaning</li> <li>♦ Spells and uses a large bank of known words correctly</li> <li>♦ Knows and uses less common letter patterns correctly, e.g., aisle, reign</li> <li>♦ Writes a variety of simple, compound, and complex sentences using appropriate punctuation</li> <li>♦ Develops a paragraph by writing a topic sentence and including supporting information</li> </ul> <p><b>PROCESSES AND STRATEGIES</b></p> <ul style="list-style-type: none"> <li>♦ Draws upon semantic, graphophonic, and syntactic knowledge when writing, e.g., world and cultural knowledge, linguistic features</li> <li>♦ Selects appropriate strategies to use throughout the writing process</li> <li>♦ Selects appropriate strategies to spell unknown words</li> <li>♦ Plans for writing in a range of ways, e.g., graphic organizers, storyboard</li> <li>♦ Independently revises, edits, and proofreads own writing</li> <li>♦ Selects appropriate text product types to enhance audience understanding and impact</li> </ul>	<p>Proficient writers demonstrate control over all components of the writing process. They understand how purpose and audience have impact on writing and are able to craft and manipulate texts to suit. They compose texts, such as research papers, newspaper articles, expositions, and hypertexts. Proficient writers are able to convey detailed information and explore different perspectives. They have developed an extensive vocabulary and use a multistrategy approach to spelling.</p> <p><b>USE OF TEXTS</b></p> <ul style="list-style-type: none"> <li>♦ Controls the crafting of a large repertoire of texts</li> <li>♦ Critiques own texts by evaluating the information retrieved, recorded, and organized</li> </ul> <p><b>CONTEXTUAL UNDERSTANDING</b></p> <ul style="list-style-type: none"> <li>♦ Makes critical choices about the composition of a text to suit different purposes and to influence audiences</li> <li>♦ Consciously provokes positive or negative responses through the representation of characters and events in literary texts</li> <li>♦ Consciously provokes positive or negative responses through the representation of people and ideas in informational texts</li> <li>♦ Selects devices designed to deepen impact or to influence a particular audience</li> </ul> <p><b>CONVENTIONS</b></p> <ul style="list-style-type: none"> <li>♦ Selects vocabulary for its shades of meaning and effect</li> <li>♦ Has accumulated an extensive bank of known words that are spelled and used correctly</li> <li>♦ Is aware of the many letter patterns that are characteristic of the English spelling system</li> <li>♦ Uses grammatically complex sentences appropriately and correctly</li> <li>♦ Organizes paragraphs logically to form a cohesive text</li> </ul> <p><b>PROCESSES AND STRATEGIES</b></p> <ul style="list-style-type: none"> <li>♦ Consciously adds to semantic, graphophonic, and syntactic knowledge as required, when writing</li> <li>♦ Selects appropriate strategies to use throughout the writing process</li> <li>♦ Accurately spells, using a multistrategy approach</li> <li>♦ Plans for writing in efficient and effective ways</li> <li>♦ Refines writing to deepen impact</li> <li>♦ Makes critical choices about the publication of texts to suit different purposes and to create impact</li> </ul>	<p>Accomplished writers are able to make critical choices about all components of writing—including style, vocabulary, and content—as they craft a wide range of texts. They are able to develop complex ideas, sustain coherence, and present information clearly. Writers in this phase reflect on, evaluate, and critique their own writing to ensure that they have achieved their specific purpose for the intended audience.</p> <p><b>USE OF TEXTS</b></p> <ul style="list-style-type: none"> <li>♦ Controls the crafting of a large repertoire of texts</li> <li>♦ Critiques own texts by evaluating the information retrieved, recorded, and organized</li> <li>♦ Is able to write using a dispassionate style that conceals personal bias</li> <li>♦ Is able to write using an emotive style that makes ideas more appealing</li> <li>♦ Writes with conviction, using a strong personal voice</li> <li>♦ Uses the metalanguage associated with writing</li> </ul> <p><b>CONTEXTUAL UNDERSTANDING</b></p> <ul style="list-style-type: none"> <li>♦ Makes critical choices about the composition of a text based on an analysis of the purpose and the intended audience</li> <li>♦ Consciously provokes positive or negative responses through the representation of characters and events in literary texts</li> <li>♦ Consciously provokes positive or negative responses through the representation of people and ideas in informational texts</li> <li>♦ Selects devices designed to deepen impact or to influence a particular audience</li> <li>♦ Recognizes how one’s values, attitudes, and beliefs have impact on the composition of a text</li> <li>♦ Accommodates or resists the likely expectations of particular audiences</li> </ul> <p><b>CONVENTIONS</b></p> <ul style="list-style-type: none"> <li>♦ Deliberately selects words to convey meaning economically and precisely</li> <li>♦ Accurately spells a wide range of words</li> <li>♦ Consciously selects sentence structure and associated punctuation to achieve impact</li> <li>♦ Organizes ideas and information clearly, sustaining coherence throughout texts</li> <li>♦ May choose to deviate from the conventions of writing to deepen impact</li> </ul> <p><b>PROCESSES AND STRATEGIES</b></p> <ul style="list-style-type: none"> <li>♦ Consciously adds to semantic, graphophonic, and syntactic knowledge as required, when writing</li> <li>♦ Selects appropriate strategies to use throughout the writing process</li> <li>♦ Accurately spells, using a multistrategy approach</li> <li>♦ Competently uses an extensive range of processes to plan, draft, and refine writing</li> <li>♦ Makes critical choices about the publication of texts based on an analysis of the purpose and the intended audience</li> </ul>
Major Teaching Emphases	<p><b>ENVIRONMENT AND ATTITUDE</b></p> <ul style="list-style-type: none"> <li>■ Create a supportive classroom environment that nurtures a community of writers.</li> <li>■ Foster students’ enjoyment of writing.</li> <li>■ Encourage students to experiment with different facets of writing, e.g., manipulating forms, use of devices.</li> <li>■ Encourage students to value writing as a social practice.</li> </ul> <p><b>USE OF TEXTS</b></p> <ul style="list-style-type: none"> <li>■ Continue to expose students to a range of text forms, and discuss the features of each.</li> <li>■ Provide opportunities for students to craft a range of texts for authentic purposes and audiences.</li> <li>■ Encourage students to experiment with the manipulation of elements to compose a text.</li> <li>■ Foster students’ sense of voice and individual writing style.</li> <li>■ Continue to teach students the metalanguage associated with writing, and encourage its use.</li> </ul> <p><b>CONTEXTUAL UNDERSTANDING</b></p> <ul style="list-style-type: none"> <li>■ Provide opportunities for students to explain their choice of text, information and ideas included or omitted, and devices used.</li> <li>■ Encourage students to represent characters and events to create specific effects in literary texts.</li> <li>■ Encourage students to represent people and ideas to create specific effects in informational texts.</li> <li>■ Encourage students to select devices to influence a particular audience.</li> <li>■ Encourage students to use writing to influence change about social issues that concern them.</li> <li>■ Continue to discuss how writers’ and readers’ knowledge, experiences, and perspectives affect the composition and interpretation of texts.</li> </ul> <p><b>CONVENTIONS</b></p> <ul style="list-style-type: none"> <li>■ Provide opportunities for students to develop, refine, and use new vocabulary.</li> <li>■ Continue to build the bank of words students can automatically spell and use, e.g., technical terms.</li> <li>■ Continue to build students’ knowledge about words and word parts, e.g., derivatives and word origins.</li> <li>■ Extend students’ knowledge of the use of punctuation, e.g., colons, hyphens.</li> <li>■ Extend students’ knowledge and use of parts of speech and their relationships, e.g., active and passive verbs.</li> <li>■ Continue to teach students to construct and manipulate a variety of sentences.</li> <li>■ Teach students different ways to develop cohesive paragraphs.</li> <li>■ Continue to build knowledge of different text forms.</li> <li>■ Build knowledge of texts where combinations and adaptations of text structure and organization have been used.</li> </ul> <p><b>PROCESSES AND STRATEGIES</b></p> <ul style="list-style-type: none"> <li>■ Continue to build students’ semantic, graphophonic, and syntactic knowledge, e.g., orthographic knowledge, cultural knowledge.</li> <li>■ Continue to teach strategies used throughout the writing process.</li> <li>■ Consolidate known spelling strategies.</li> <li>■ Encourage students to discuss the effectiveness of various ways they plan for writing.</li> <li>■ Encourage students to use revising, editing, and proofreading to refine their writing.</li> <li>■ Continue to encourage students to select and use text product types that best suit purpose and audience, e.g., Web site, video, portfolio.</li> <li>■ Encourage students to evaluate their effectiveness in retrieving, recording, and organizing information from texts and to critique own texts.</li> <li>■ Model how to reflect on the writing process and products, and encourage students to do the same.</li> </ul>	<p><b>ENVIRONMENT AND ATTITUDE</b></p> <ul style="list-style-type: none"> <li>■ Create a supportive classroom environment that nurtures a community of writers.</li> <li>■ Foster students’ enjoyment of writing.</li> <li>■ Encourage students to experiment with different facets of writing, e.g., creating hybrid texts, refining texts.</li> <li>■ Encourage students to value writing as a social practice.</li> </ul> <p><b>USE OF TEXTS</b></p> <ul style="list-style-type: none"> <li>■ Encourage students to explore and discuss a wide range of literary and informational texts.</li> <li>■ Encourage students to craft a range of literary and informational texts for authentic purposes and audiences.</li> <li>■ Encourage students to manipulate elements to craft a range of texts, e.g., hybrid texts, multimodal texts.</li> <li>■ Foster students’ sense of voice and individual writing style.</li> <li>■ Encourage students to independently use the metalanguage associated with writing.</li> </ul> <p><b>CONTEXTUAL UNDERSTANDING</b></p> <ul style="list-style-type: none"> <li>■ Continue to provide opportunities for students to discuss the choices they have made when crafting texts, such as <ul style="list-style-type: none"> <li>– text form</li> <li>– devices used to influence</li> <li>– the representation of people and ideas</li> <li>– the representation of characters and events</li> </ul> </li> <li>■ Encourage students to use writing to influence change about social issues that concern them.</li> <li>■ Explore how the ideologies of the writer and the reader combine to create an interpretation of the text.</li> </ul> <p><b>CONVENTIONS</b></p> <ul style="list-style-type: none"> <li>■ Encourage students to take responsibility for extending, refining, and using new vocabulary.</li> <li>■ Reinforce to students their obligation to use spelling and grammar that is appropriate to the context.</li> <li>■ Continue to teach students how to compose cohesive paragraphs and coherent texts.</li> <li>■ Encourage students to build their knowledge of different text forms as required.</li> <li>■ Continue to explore texts where combinations and adaptations of conventions have been used.</li> </ul> <p><b>PROCESSES AND STRATEGIES</b></p> <ul style="list-style-type: none"> <li>■ Continue to build students’ semantic, graphophonic, and syntactic knowledge.</li> <li>■ Consolidate strategies used throughout the writing process.</li> <li>■ Consolidate spelling strategies.</li> <li>■ Encourage students to be selective in the way they plan for writing.</li> <li>■ Encourage students to refine their texts holistically to ensure that they are effective.</li> <li>■ Encourage students to be selective in their choice of text product types</li> <li>■ Continue to encourage students to evaluate their effectiveness in retrieving, recording, and organizing information from texts and to critique own texts.</li> <li>■ Model how to reflect on the writing process and products, and encourage students to do the same.</li> </ul>	<p><b>Major Teaching Emphases and Teaching and Learning Experiences</b> are not provided for this phase, as Accomplished writers are able to take responsibility for their own ongoing writing development.</p>



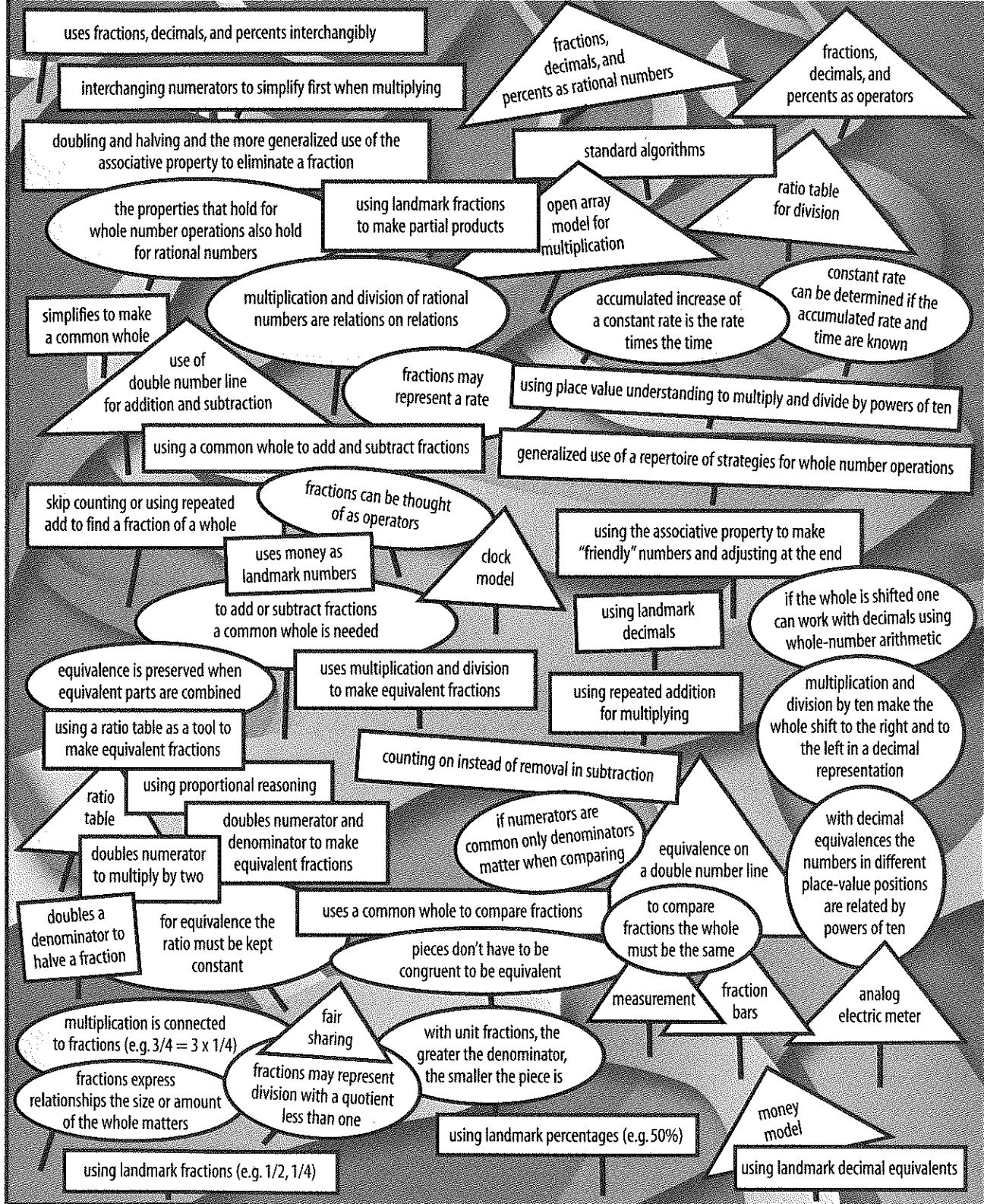


# MULTIPLICATION/DIVISION

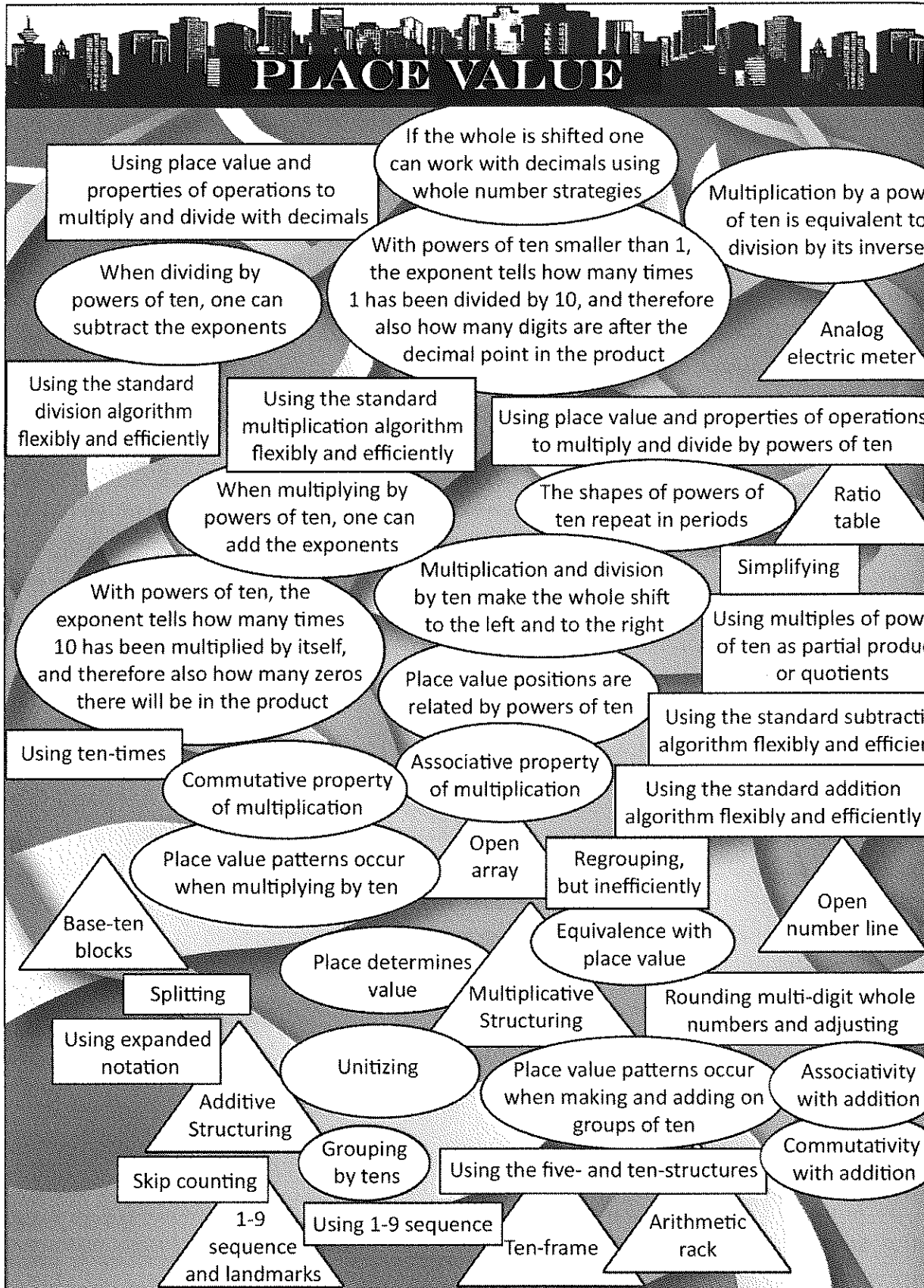


The landscape of learning: multiplication and division on the horizon showing landmark strategies (rectangles), big ideas (ovals), and models (triangles).

# FRACTIONS, DECIMALS, and PERCENTS



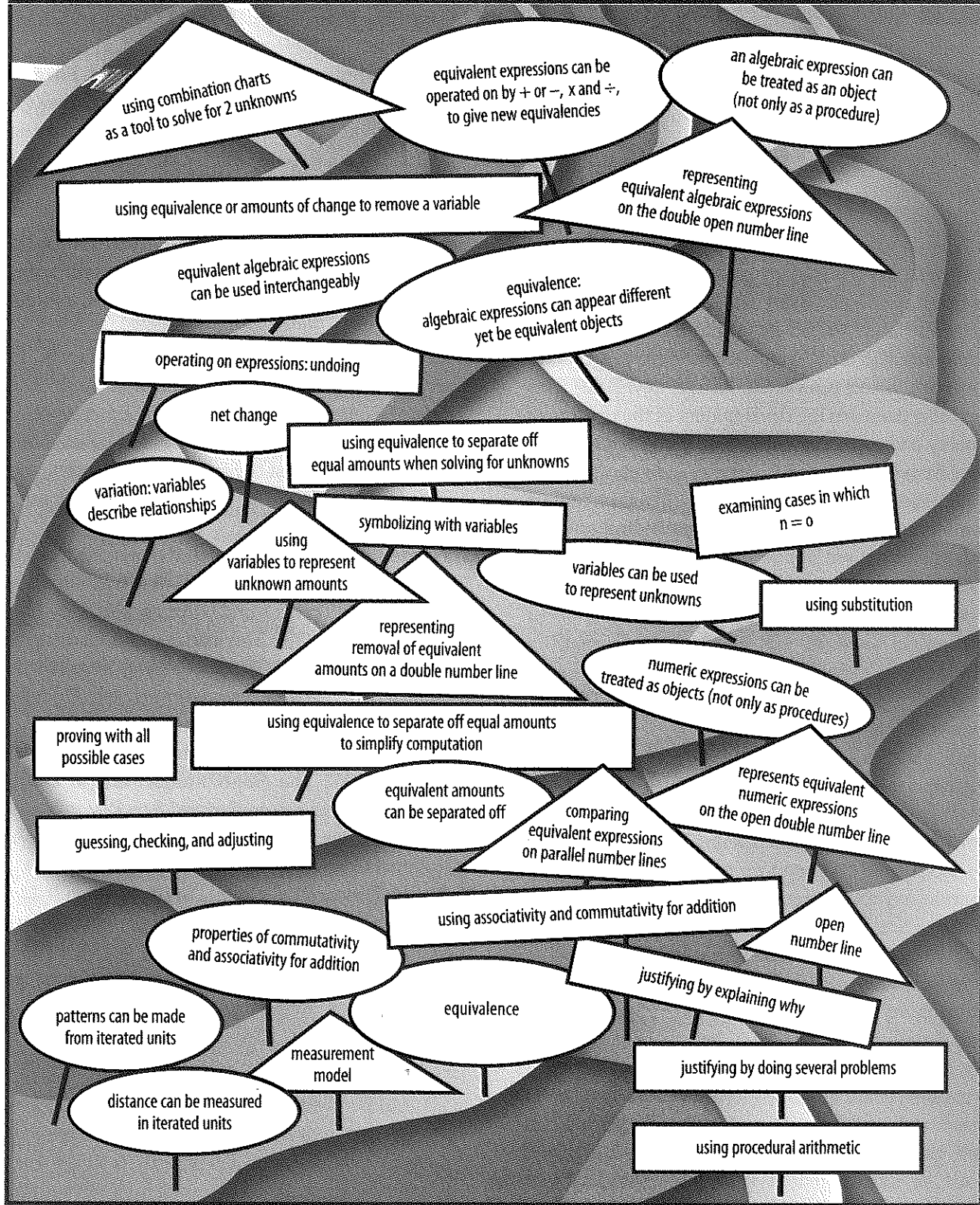
The landscape of learning: fractions, decimals, and percents on the horizon showing landmark strategies (rectangles), big ideas (ovals), and models (triangles).



*The landscape of learning: place value on the horizon showing landmark strategies (rectangle), big ideas (ovals), and models (triangles).*



# ALGEBRA



The landscape of learning: algebra on the horizon showing landmark strategies (rectangles), big ideas (ovals), and models (triangles).



## Kindergarten

### Common Core State Standards for Mathematics

#### Counting and Cardinality

##### Count to tell the number of objects.

Understand the relationship between numbers and quantities; connect counting to cardinality.

- When counting objects, says the number names in the standard order, pairing each object with one and only one number name and each number name with one and only one object.
- Understand that the last number name said tells the number of objects counted. The number of objects is the same regardless of their arrangement or the order in which they were counted.
- Understand that each successive number name refers to a quantity that is one larger.

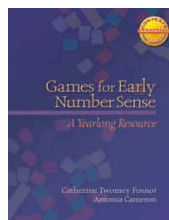
Count to answer “how many?” questions about as many as 20 things arranged in a line, a rectangular array, or a circle, or as many as 10 things in a scattered configuration; given a number from 1–20, count out that many objects.

##### Compare numbers.

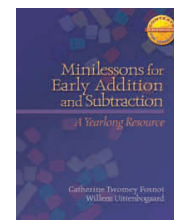
Identify whether the number of objects in one group is greater than, less than, or equal to the number of objects in another group, e.g., by using matching and counting strategies.

Compare two numbers between 1 and 10 presented as written numerals.

### Contexts for Learning Mathematics



*Games for Early Number Sense: A Yearlong Resource*



*Minilessons for Early Addition and Subtraction: A Yearlong Resource*

Resource units of games and brief minilessons can be used throughout the year as an integral part of math workshop and for differentiation as needed.

3 | Learn more about the *Contexts for Learning Mathematics* series at [ContextsforLearning.com](http://ContextsforLearning.com).

## Kindergarten

### Common Core State Standards for Mathematics

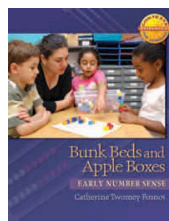
#### Operations & Algebraic Thinking

##### Understand addition as putting together and adding to, and subtraction as taking apart and taking from.

Decompose numbers less than or equal to 10 into pairs in more than one way, e.g. by using objects or drawings, and recording each decomposition by a drawing or equation (e.g.  $5 = 2 + 3$  and  $5 = 4 + 1$ ).

For any number from 1 to 9, find the number that makes 10 when added to the given number, e.g., by using objects or drawings, and record the answer with a drawing or equation.

Fluently add and subtract within 5.

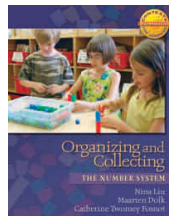


*Bunk Beds and Apple Boxes: Early Number Sense*

#### Number and Operations in Base Ten

##### Work with numbers 11–19 to gain foundations for place value.

Compose and decompose numbers from 11 to 19 into ten ones and some further ones, e.g. by using objects or drawings, and record each composition or decomposition by a drawing or equation (such as  $18 = 10 + 8$ ); understand that these numbers are composed of ten ones and one, two, three, four, five, six, seven, eight, or nine ones.



*Organizing and Collecting: The Number System*

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## Grade 1

### Common Core State Standards for Mathematics

#### Operations and Algebraic Thinking

##### Represent and solve problems involving addition and subtraction.

Use addition and subtraction within 20 to solve word problems involving situations of adding to, taking from, putting together, taking apart, and comparing, with unknowns in all positions, e.g., by using objects, drawings, and equations with a symbol for the unknown number to represent the problem.

##### Understand and apply properties of operations and the relationship between addition and subtraction.

Apply properties of operations as strategies to add and subtract. *Examples:* If  $8 + 3 = 11$  is known, then  $3 + 8 = 11$  is also known. (Commutative property of addition.) To add  $2 + 6 + 4$ , the second two numbers can be added to make a ten, so  $2 + 6 + 4 = 2 + 10 = 12$ . (Associative property of addition.)

Understand subtraction as an unknown-addend problem. *For example,* subtract  $10 - 8$  by finding the number that makes 10 when added to 8.

##### Add and subtract within 20.

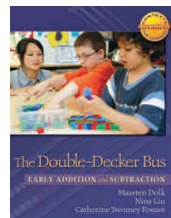
Add and subtract within 20, demonstrating fluency for addition and subtraction within 10. Use strategies such as counting on; making ten (e.g.,  $8 + 6 = 8 + 2 + 4 = 10 + 4 = 14$ ); decomposing a number leading to a ten (e.g.,  $13 - 4 = 13 - 3 - 1 = 10 - 1 = 9$ ); using the relationship between addition and subtraction (e.g., knowing that  $8 + 4 = 12$ , one knows  $12 - 8 = 4$ ); and creating equivalent but easier or known sums (e.g., adding  $6 + 7$  by creating the known equivalent  $6 + 6 + 1 = 12 + 1 = 13$ ).

##### Work with addition and subtraction equations.

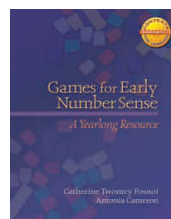
Understand the meaning of the equal sign, and determine if equations involving addition and subtraction are true or false. *For example,* which of the following equations are true and which are false?  $6 = 6$ ,  $7 = 8 - 1$ ,  $5 + 2 = 2 + 5$ ,  $4 + 1 = 5 + 2$ .

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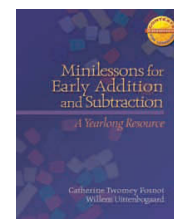
### Contexts for Learning Mathematics



*The Double-Decker Bus:  
Early Addition and Subtraction*



*Games for Early Number Sense:  
A Yearlong Resource*



*Minilessons for Early  
Addition and Subtraction:  
A Yearlong Resource*

Resource units of games and brief minilessons can be used throughout the year as an integral part of math workshop and for differentiation as needed.

## Grade 1

### Common Core State Standards for Mathematics

#### Number and Operations in Base Ten

##### Extend the counting sequence.

Count to 120, starting at any number less than 120. In this range, read and write numerals and represent a number of objects with a written numeral.

##### Understand place value.

Understand that the two digits of a two-digit number represent amounts of tens and ones. Understand the following as special cases:

- 10 can be thought of as a bundle of ten ones—called a “ten.”
- The numbers from 11–19 are composed of a ten and a one, two, three, four, five, six, seven, eight, or nine ones.
- The numbers 10, 20, 30, 40, 50, 60, 70, 80, 90 refer to one, two, three, four, five, six, seven, eight, or nine tens (and 0 ones).

##### Use place value understanding and properties of operations to add and subtract.

Add within 100, including adding a two-digit number and a one-digit number, and adding a two-digit number and a multiple of 10, using concrete models or drawings and strategies based on place value, properties of operations, and/or the relationship between addition and subtraction; relate the strategy to a written method and explain the reasoning used. Understand that in adding two-digit numbers, one adds tens and tens, ones and ones; and sometimes it is necessary to compose a ten.

Given a two-digit number, mentally find 10 more or 10 less than the number, without having to count; explain the reasoning used.

Subtract multiples of 10 in the range 10–90 from multiples of 10 in the range 10–90 (positive or zero differences), using concrete models or drawings and strategies based on place value, properties of operations, and/or the relationship between addition and subtraction; relate the strategy to a written method and explain the reasoning used.

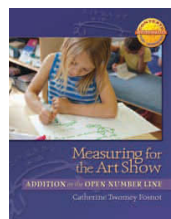
6 | Learn more about the *Contexts for Learning Mathematics* series at [ContextsforLearning.com](http://ContextsforLearning.com).

### Contexts for Learning Mathematics



*Organizing and Collecting:  
The Number System*

**Note:** Can be used in K and repeated in 1 because the inventory this time is of a new classroom and the numbers provided of objects can be larger and differentiated to support development of individual learners.



*Measuring for the Art Show:  
Addition on the Open  
Number Line*

## Grade 1

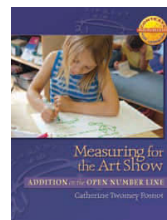
### Common Core State Standards for Mathematics

#### Measurement and Data

#### Measure lengths indirectly and by iterating length units.

Order three objects by length; compare the lengths of two objects indirectly by using a third object.

Express the length of an object as a whole number of length units, by laying multiple copies of a shorter object (the length unit) end to end; understand that the length measurement of an object is the number of same-size length units that span it with no gaps or overlaps.



*Measuring for the Art Show: Addition on the Open Number Line*

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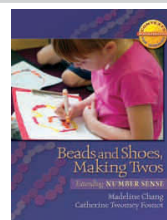
## Grade 2

### Common Core State Standards for Mathematics

#### Operations and Algebraic Thinking

#### Work with equal groups of objects to gain foundations for multiplication.

Determine whether a group of objects (up to 20) has an odd or even number of members, e.g. by pairing objects or counting by twos; write an equation to express an even number as the sum of two equal addends.



*Beads and Shoes, Making Twos: Extending Number Sense*

#### Number and Operations in Base Ten

#### Use place value understanding and properties of operations to add and subtract.

Fluently add and subtract within 100 using strategies based on place value, properties of operations, and/or the relationship between addition and subtraction.

Add up to four two-digit numbers using strategies based on place value and properties of operations.

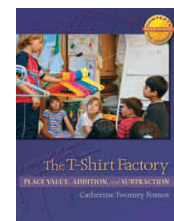
Add and subtract within 1000, using concrete models or drawings and strategies based on place value, properties of operations, and/or the relationship between addition and subtraction; relate the strategy to a written method. Understand that in adding or subtracting three-digit numbers, one adds or subtracts hundreds and hundreds, tens and tens, ones and ones; and sometimes it is necessary to compose or decompose tens or hundreds.

Mentally add 10 or 100 to a given number 100–900, and mentally subtract 10 or 100 from a given number 100–900.

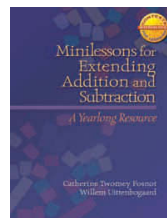
Explain why addition and subtraction strategies work, using place value and the properties of operations.



*Ages and Timelines: Subtraction on the Open Number Line*



*The T-Shirt Factory: Place Value Addition, and Subtraction*



*Minilessons for Extending Addition and Subtraction: A Yearlong Resource*

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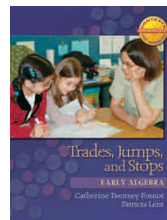
## Grade 2

### Common Core State Standards for Mathematics

#### Measurement and Data

#### Work with time and money.

Solve word problems involving dollar bills, quarters, dimes, nickels and pennies, using \$ and ¢ symbols appropriately. Example: If you have 2 dimes and 3 pennies, how many cents do you have?



*Trades, Jumps, and Stops: Early Algebra*

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## Grade 3

### Common Core State Standards for Mathematics

#### Operations and Algebraic Thinking

#### Represent and solve problems involving multiplication and division.

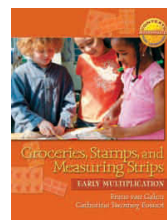
Interpret products of whole numbers, e.g., interpret  $5 \times 7$  as the total number of objects in 5 groups of 7 objects each. For example, describe a context in which a total number of objects can be expressed as  $5 \times 7$ .

#### Understand properties of multiplication and the relationship between multiplication and division.

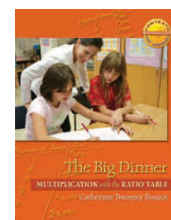
Apply properties of operations as strategies to multiply and divide. *Examples:* If  $6 \times 4 = 24$  is known, then  $4 \times 6 = 24$  is also known. (Commutative property of multiplication.)  $3 \times 5 \times 2$  can be found by  $3 \times 5 = 15$ , then  $15 \times 2 = 30$ , or by  $5 \times 2 = 10$ , then  $3 \times 10 = 30$ . (Associative property of multiplication.) Knowing that  $8 \times 5 = 40$  and  $8 \times 2 = 16$ , one can find  $8 \times 7$  as  $8 \times (5 + 2) = (8 \times 5) + (8 \times 2) = 40 + 16 = 56$ . (Distributive property.)

#### Multiply and divide within 100.

Fluently multiply and divide within 100, using strategies such as the relationship between multiplication and division (e.g., knowing that  $8 \times 5 = 40$ , one knows  $40 \div 5 = 8$ ) or properties of operations.

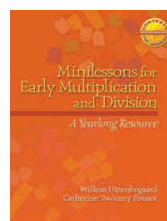


*Groceries, Stamps, and Measuring Strips: Early Multiplication*



*The Big Dinner: Multiplication with the Ratio Table*

Follow with *Minilessons for Early Multiplication and Division* and use throughout the year.



*Minilessons for Early Multiplication and Division: A Yearlong Resource*

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## Grade 3

### Common Core State Standards for Mathematics

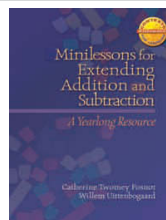
#### Number and Operations in Base Ten

**Use place value understanding and properties of operations to perform multi-digit arithmetic.**

Fluently add and subtract within 1000 using strategies and algorithms based on place value, properties of operations, and/or the relationship between addition and subtraction.

Multiply one-digit whole numbers by multiples of 10 in the range 10–90 (e.g.,  $9 \times 80$ ,  $5 \times 60$ ) using strategies based on place value and properties of operations.

### Contexts for Learning Mathematics

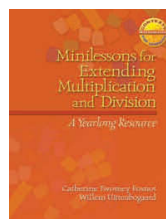


*Minilessons for Extending Addition and Subtraction: A Yearlong Resource*



*Muffles' Truffles: Multiplication and Division with the Array*

Follow with *Minilessons for Extending Multiplication and Division* and use throughout the year.



*Minilessons for Extending Multiplication and Division: A Yearlong Resource*

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## Grade 4

### Common Core State Standards for Mathematics

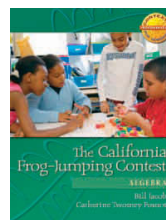
#### Operations and Algebraic Thinking

**Use the four operations with whole numbers to solve problems.**

Solve multistep word problems posed with whole numbers and having whole-number answers using the four operations, including problems in which remainders must be interpreted. Represent these problems using equations with a letter standing for the unknown quantity. Assess the reasonableness of answers using mental computation and estimation strategies including rounding.

**Gain familiarity with factors and multiples.**

Find all factor pairs for a whole number in the range 1–100. Recognize that a whole number is a multiple of each of its factors. Determine whether a given whole number in the range 1–100 is a multiple of a given one-digit number. Determine whether a given whole number in the range 1–100 is prime or composite.



*The California Frog-Jumping Contest: Algebra*

#### Number and Operations in Base Ten

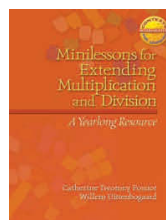
**Generalize place value understanding for multi-digit whole numbers.**

Recognize that in a multi-digit whole number, a digit in one place represents ten times what it represents in the place to its right. For example, recognize that  $700 \div 70 = 10$  by applying concepts of place value and division.

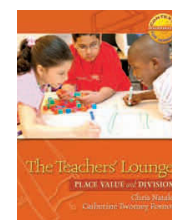
**Use place value understanding and properties of operations to perform multi-digit arithmetic.**

Multiply a whole number of up to four digits by a one-digit whole number, and multiply two two-digit numbers, using strategies based on place value and the properties of operations. Illustrate and explain the calculation by using equations, rectangular arrays, and/or area models.

Find whole-number quotients and remainders with up to four-digit dividends and one-digit divisors, using strategies based on place value, the properties of operations, and/or the relationship between multiplication and division. Illustrate and explain the calculation by using equations, rectangular arrays, and/or area models.



*Minilessons for Extending Multiplication and Division: A Yearlong Resource*



*The Teachers' Lounge: Place Value and Division*

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## Grade 4

### Common Core State Standards for Mathematics

#### Number and Operations — Fractions

#### Extend understanding of fraction equivalence and ordering.

Explain why a fraction  $a/b$  is equivalent to a fraction  $(n \times a)/(n \times b)$  by using visual fraction models, with attention to how the number and size of the parts differ even though the two fractions themselves are the same size. Use this principle to recognize and generate equivalent fractions.

Compare two fractions with different numerators and different denominators, e.g., by creating common denominators or numerators, or by comparing to a benchmark fraction such as  $1/2$ . Recognize that comparisons are valid only when the two fractions refer to the same whole. Record the results of comparisons with symbols  $>$ ,  $=$ , or  $<$ , and justify the conclusions, e.g., by using a visual fraction model.

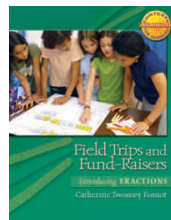
#### Build fractions from unit fractions by applying and extending previous understandings of operations on whole numbers.

Understand a fraction  $a/b$  with  $a > 1$  as a sum of fractions  $1/b$ .

- Understand addition and subtraction of fractions as joining and separating parts referring to the same whole.
- Decompose a fraction into a sum of fractions with the same denominator in more than one way, recording each decomposition by an equation. Justify decompositions, e.g., by using a visual fraction model. *Examples:*  $3/8 = 1/8 + 1/8 + 1/8$ ;  $3/8 = 1/8 + 2/8$ ;  $2 \frac{1}{8} = 1 + 1 + 1/8 = 8/8 + 8/8 + 1/8$ .
- Add and subtract mixed numbers with like denominators, e.g., by replacing each mixed number with an equivalent fraction, and/or by using properties of operations and the relationship between addition and subtraction.
- Solve word problems involving addition and subtraction of fractions referring to the same whole and having like denominators, e.g., by using visual fraction models and equations to represent the problem.

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### Contexts for Learning Mathematics



*Field Trips and Fund-Raisers: Introducing Fractions*

## Grade 4

### Common Core State Standards for Mathematics

#### Number and Operations — Fractions, con't.

Apply and extend previous understandings of multiplication to multiply a fraction by a whole number.

- Understand a fraction  $a/b$  as a multiple of  $1/b$ . *For example*, use a visual fraction model to represent  $5/4$  as the product  $5 \times (1/4)$ , recording the conclusion by the equation  $5/4 = 5 \times (1/4)$ .
- Understand a multiple of  $a/b$  as a multiple of  $1/b$ , and use this understanding to multiply a fraction by a whole number. *For example*, use a visual fraction model to express  $3 \times (2/5)$  as  $6 \times (1/5)$ , recognizing this product as  $6/5$ . (In general,  $n \times (a/b) = (n \times a)/b$ .)
- Solve word problems involving multiplication of a fraction by a whole number, e.g., by using visual fraction models and equations to represent the problem. *For example*, if each person at a party will eat  $3/8$  of a pound of roast beef, and there will be 5 people at the party, how many pounds of roast beef will be needed? Between what two whole numbers does your answer lie?

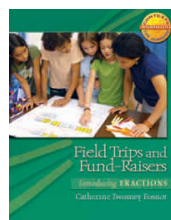
#### Understand decimal notation for fractions, and compare decimal fractions.

Express a fraction with denominator 10 as an equivalent fraction with denominator 100, and use this technique to add two fractions with respective denominators 10 and 100. For example, express  $3/10$  as  $30/100$ , and add  $3/10 + 4/100 = 34/100$ .

Use decimal notation for fractions with denominators 10 or 100. For example, rewrite 0.62 as  $62/100$ ; describe a length as 0.62 meters; locate 0.62 on a number line diagram.

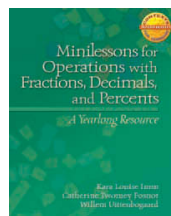
Compare two decimals to hundredths by reasoning about their size. Recognize that comparisons are valid only when the two decimals refer to the same whole. Record the results of comparisons with the symbols  $>$ ,  $=$ , or  $<$ , and justify the conclusions, e.g., by using a visual model.

### Contexts for Learning Mathematics



*Field Trips and Fund-Raisers: Introducing Fractions*

Follow with coin fractions in *Minilessons for Operations with Fractions, Decimals, and Percents*, pgs. 13–22.



*Minilessons for Operations with Fractions, Decimals, and Percents: A Yearlong Resource*

## Grade 5

### Common Core State Standards for Mathematics

#### Number and Operations in Base Ten

#### Understand the place value system.

Recognize that in a multi-digit number, a digit in one place represents 10 times as much as it represents in the place to its right and 1/10 of what it represents in the place to its left.

Explain patterns in the number of zeros of the product when multiplying a number by powers of 10, and explain patterns in the placement of the decimal point when a decimal is multiplied or divided by a power of 10. Use whole-number exponents to denote powers of 10.

Read, write, and compare decimals to thousandths.

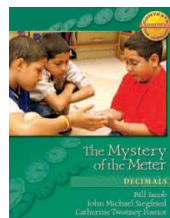
- Read and write decimals to thousandths using base-ten numerals, number names, and expanded form, e.g.,  $347.392 = 3 \times 100 + 4 \times 10 + 7 \times 1 + 3 \times (1/10) + 9 \times (1/100) + 2 \times (1/1000)$ .
- Compare two decimals to thousandths based on meanings of the digits in each place, using  $>$ ,  $=$ , and  $<$  symbols to record the results of comparisons.

Use place value understanding to round decimals to any place.

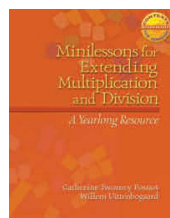
#### Perform operations with multi-digit whole numbers and with decimals to hundredths.

Find whole-number quotients of whole numbers with up to four-digit dividends and two-digit divisors, using strategies based on place value, the properties of operations, and/or the relationship between multiplication and division. Illustrate and explain the calculation by using equations, rectangular arrays, and/or area models.

### Contexts for Learning Mathematics



*The Mystery of the Meter: Decimals*



*Minilessons for Extending Multiplication and Division: A Yearlong Resource*

Continue with this as needed throughout the year and with small groups to get multiplication and division fluent, including the standard algorithms.

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## Grade 5

### Common Core State Standards for Mathematics

#### Number and Operations — Fractions

#### Use equivalent fractions as a strategy to add and subtract fractions.

Add and subtract fractions with unlike denominators (including mixed numbers) by replacing given fractions with equivalent fractions in such a way as to produce an equivalent sum or difference of fractions with like denominators. *For example*,  $2/3 + 5/4 = 8/12 + 15/12 = 23/12$ . (In general,  $a/b + c/d = (ad + bc)/bd$ .)

Solve word problems involving addition and subtraction of fractions referring to the same whole, including cases of unlike denominators, e.g., by using visual fraction models or equations to represent the problem. Use benchmark fractions and number sense of fractions to estimate mentally and assess the reasonableness of answers. *For example*, recognize an incorrect result  $2/5 + 1/2 = 3/7$ , by observing that  $3/7 < 1/2$ .

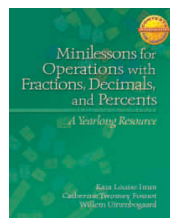
#### Apply and extend previous understandings of multiplication and division to multiply and divide fractions.

Interpret a fraction as division of the numerator by the denominator ( $a/b = a \div b$ ). Solve word problems involving division of whole numbers leading to answers in the form of fractions or mixed numbers.

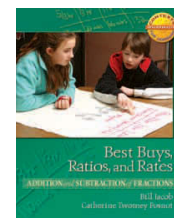
Apply and extend previous understandings of multiplication to multiply a fraction or whole number by a fraction.

- Interpret the product  $(a/b) \times q$  as a parts of a partition of  $q$  into  $b$  equal parts; equivalently, as the result of a sequence of operations  $a \times q \div b$ . *For example*, use a visual fraction model to show  $(2/3) \times 4 = 8/3$ , and create a story context for this equation. Do the same with  $(2/3) \times (4/5) = 8/15$ . (In general,  $(a/b) \times (c/d) = ac/bd$ .)
- Find the area of a rectangle with fractional side lengths by tiling it with unit squares of the appropriate unit fraction side lengths, and show that the area is the same as would be found by multiplying the side lengths. Multiply fractional side lengths to find areas of rectangles, and represent fraction products as rectangular areas.

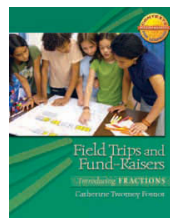
### Contexts for Learning Mathematics



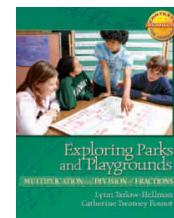
*Minilessons for Operations with Fractions, Decimals, and Percents: A Yearlong Resource*



*Best Buys, Ratios, and Rates: Addition and Subtraction of Fractions*



*Field Trips and Fund-Raisers: Introducing Fractions*



*Exploring Parks and Playgrounds: Multiplication and Division of Fractions*

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## Grade 5

### Common Core State Standards for Mathematics

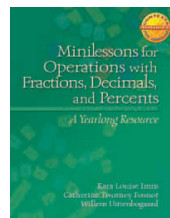
#### Number and Operations — Fractions, con't.

Solve real world problems involving multiplication of fractions and mixed numbers, e.g., by using visual fraction models or equations to represent the problem.

Apply and extend previous understandings of division to divide unit fractions by whole numbers and whole numbers by unit fractions.

- Interpret division of a unit fraction by a non-zero whole number, and compute such quotients. *For example*, create a story context for  $(1/3) \div 4$ , and use a visual fraction model to show the quotient. Use the relationship between multiplication and division to explain that  $(1/3) \div 4 = 1/12$  because  $(1/12) \times 4 = 1/3$ .
- Interpret division of a whole number by a unit fraction, and compute such quotients. *For example*, create a story context for  $4 \div (1/5)$ , and use a visual fraction model to show the quotient. Use the relationship between multiplication and division to explain that  $4 \div (1/5) = 20$  because  $20 \times (1/5) = 4$ .

### Contexts for Learning Mathematics



*Minilessons for Operations with Fractions, Decimals, and Percents: A Yearlong Resource*

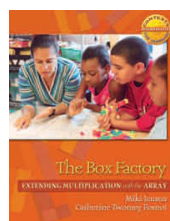
(from pg. 57 to end of book)

### Measurement and Data

**Geometric measurement: understand concepts of volume and relate volume to multiplication and to addition.**

Recognize volume as an attribute of solid figures and understand concepts of volume measurement.

- A cube with side length 1 unit, called a “unit cube,” is said to have “one cubic unit” of volume, and can be used to measure volume.
- A solid figure which can be packed without gaps or overlaps using  $n$  unit cubes is said to have a volume of  $n$  cubic units.



*The Box Factory: Extending Multiplication with the Array*

Measure volumes by counting unit cubes, using cubic cm, cubic in, cubic ft, and improvised units.

17 | Learn more about the *Contexts for Learning Mathematics* series at [ContextsforLearning.com](http://ContextsforLearning.com).

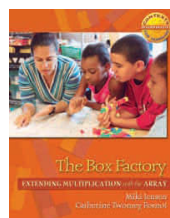
## Grade 5

### Common Core State Standards for Mathematics

#### Measurement and Data, con't.

Relate volume to the operations of multiplication and addition and solve real world and mathematical problems involving volume.

- Find the volume of a right rectangular prism with whole-number side lengths by packing it with unit cubes, and show that the volume is the same as would be found by multiplying the edge lengths, equivalently by multiplying the height by the area of the base. Represent threefold whole-number products as volumes, e.g., to represent the associative property of multiplication.
- Apply the formulas  $V = l \times w \times h$  and  $V = b \times h$  for rectangular prisms to find volumes of right rectangular prisms with whole-number edge lengths in the context of solving real world and mathematical problems.
- Recognize volume as additive. Find volumes of solid figures composed of two non-overlapping right rectangular prisms by adding the volumes of the non-overlapping parts, applying this technique to solve real world problems.



*The Box Factory: Extending Multiplication with the Array*

18 | Learn more about the *Contexts for Learning Mathematics* series at [ContextsforLearning.com](http://ContextsforLearning.com).



“ Our work is driven by the desire to transform classrooms into communities of mathematicians: places where children explore interesting problems and, like mathematicians, engage in crafting solutions, justifications, and proofs of their own making.”

—Catherine Fosnot



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12/29/2020

Becoming Who I Am – Opal School Online



[Becoming Who I Am](#) from [Museum Center for Learning](#) on [Vimeo](#).

People oftentimes ask, *What becomes of children after they graduate Opal School?* I imagine it's a question that comes up in all of your schools – learning environments that prioritize community and connection, the social-emotional and the intellectual, creativity and expression, empathy and agency, conflict and beauty, democracy and citizenship. The rich neural architecture constructed in these environments isn't always immediately apparent – and certainly isn't captured in standardized exams. That our schools are vital places of joyful theory building in the present is indisputable, but people wonder: What lives bloom from these roots? How do people who grew in these spaces, to paraphrase Loris Malaguzzi, continue to draw from the gem that they hold in their pockets?

Our new film, *Becoming Who I Am*, illustrates how those learning environments that you are working so hard to create lead people to become the neighbors, coworkers, and changemakers the world needs. We hope that it inspires you and that it is useful to you: we hope that you show it at your back-to-school nights to extend parents' imagination and alleviate their fears; in your teacher education classes to help the next generation of educators see the value of their innovation; to your friends and families so that they can finally understand why you do the work that you do; to advocate for greater opportunities for all young people.

We're awfully excited about this film, made by the extraordinarily talented and generous Opal School parents Irene Tejaratchi Hess and Mark Palansky. Let us know what you think!

<https://opalschool.org/becoming-who-i-am/>



Opal School strengthens education through provoking fresh ideas concerning environments where creativity, imagination, and the wonder of learning thrives.

**This year, find inspiration in these online courses and in-person retreats:**

### Online Courses

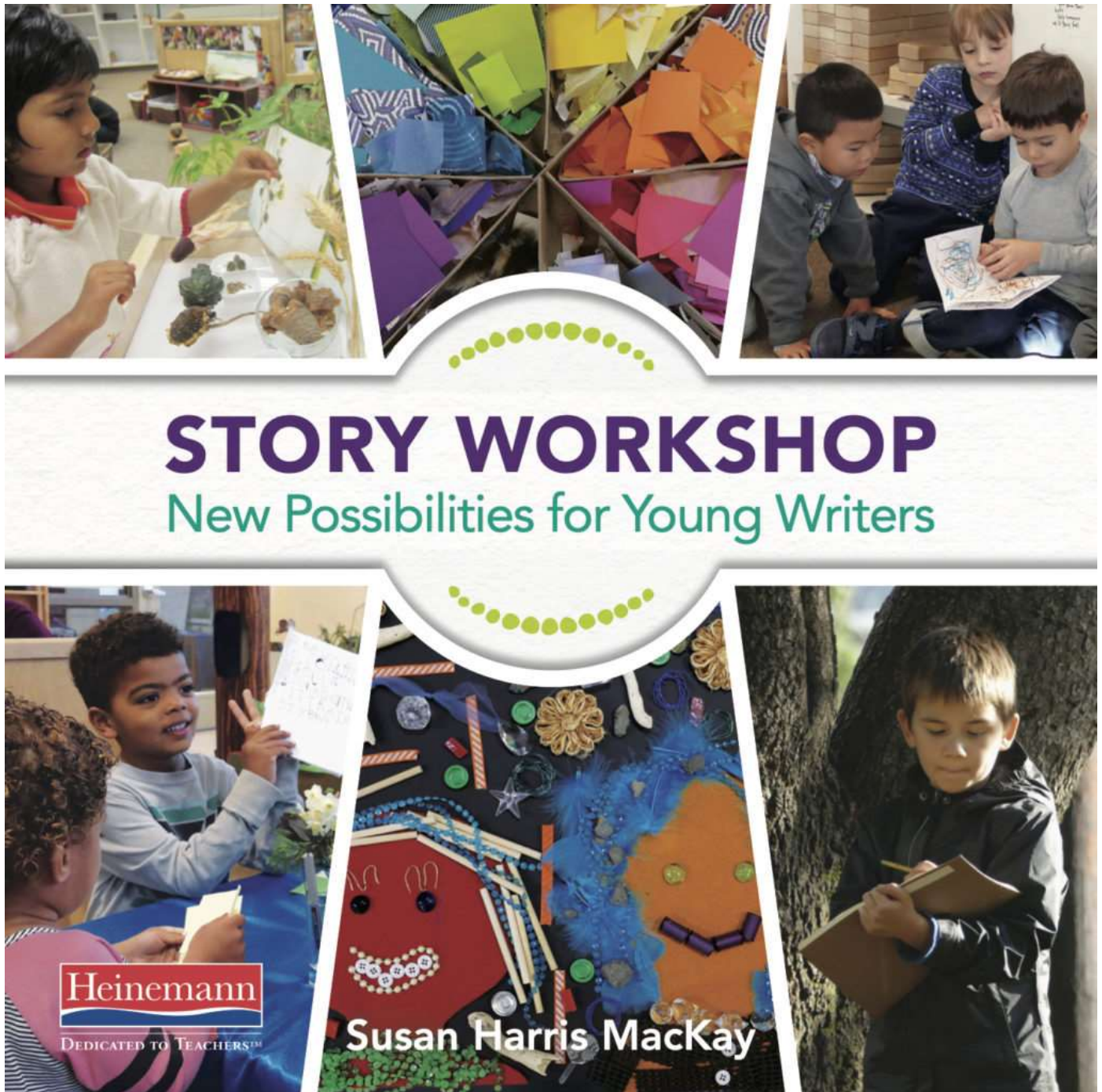
- **Developing Your Story Workshop:** Choose between Fall 2019 and Spring 2020
- **Growing Changemakers:** Fall/Winter 2019
- **Playful Literacy:** Winter/Spring 2020

### In-person Retreats

- **Constructing Collaborative and Creative Learning Communities:** October 24–26, 2019
- **Opal School Visitation Days 2020 - Engaging Playful Inquiry:**  
Choose between February 5–7, March 15–17, April 15–17, and May 20–22
- **Opal School Summer Symposium:** June 17–19, 2020

Learn more and register at <http://bit.ly/opalschoolworkshops>

opalschool.org • thecenter@opalschool.org • 503.471.9906



*Available for pre-order, January 2021*

It is with great excitement that we share the cover of our forthcoming book — *Story Workshop: New Possibilities for Young Writers*— available for pre-order from Heinemann next month!

This book is the result of big questions, years of research, layers and layers of collaboration with colleagues, with children, and with families, and the imagination and support of Heinemann.

Over the years, it has been an honor to watch interest in Story Workshop grow from seeds cast around the world. Taking root in varied soils, Story Workshop has invited members of classroom communities to build creative and meaningful thought partnership grounded in the stories children bring to school – real and imagined. Story Workshop has encouraged writing from those stories – supporting children to develop an authentic relationship between their experiences and the way they choose to craft the telling of them. Those tellings, in a variety of forms, nurture listening. And through that reciprocity, those involved know better who they are, both as individuals and as a community. They learn how much they need each other, and how story helps us find one another. They learn that writing is a powerful tool for connection — and a powerful tool for making the world you want to live in.

Too often, when we ask children, *Does that make sense?*, we mean it as corrective. We already know the answer. Story Workshop invites children to show and to tell us what makes sense to *them*. Story Workshop supports teachers to put literacy learning in service of meaning-making rather than the other way around. It rests on the assumption that we are all making meaning, all of the time — that we can count on that no matter what — and that literacy is a powerful tool to take us where we want to go — alongside others who want those same things: to make meaning in the company of others. Story Workshop gives us a structure to arrive together at new meanings – at a place that might surprise us. Story Workshop creates an opportunity for children to learn that they matter to that journey because it could not happen without them.

We are thrilled to have the support of Heinemann to expand the reach of these powerful findings. The book will also include new video and other online resources to support your Story Workshop. We're looking forward to providing a range of opportunities to engage with you around the content of the book!

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BY SUSAN HARRIS MACKAY ([HTTPS://OPALSCHOOL.ORG/TEACHERS/SUSAN-HARRIS-MACKAY/](https://opalschool.org/teachers/susan-harris-mackay/)) | DECEMBER 8, 2020 | TEACHING AND LEARNING ([HTTPS://OPALSCHOOL.ORG/CATEGORY/TEACHING-AND-LEARNING/](https://opalschool.org/category/teaching-and-learning/)) | 1 COMMENT | TAGS: STORY WORKSHOP ([HTTPS://OPALSCHOOL.ORG/TAG/STORY-WORKSHOP/](https://opalschool.org/tag/story-workshop/))

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Susan Harris Mackay  
(<https://opalschool.org/author/smackayportlandcm-org/>)