



**2011**

**NEW MEXICO  
CHARTER SCHOOL APPLICATION**

Charter Schools Division  
New Mexico Public Education Department  
CNM Workforce Training Center  
5600 Eagle Rock Avenue, Room 227  
Albuquerque, NM 87113  
(505) 222-4762

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## II. APPLICATION COVER SHEET/ NOTICE OF INTENT/ABSTRACT

**School Information:**

Name of Proposed Charter School Uplift Community School  
 School Address (if known) \_\_\_\_\_  
 School Location (City/Town) Gallup  
 School District within which the school will be located Gallup McKinley County Schools

**Contact Information:**

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**Partner Organizations (if applicable):**

**Enrollment Information:**

Grade span at full enrollment K-8 Total number of students at full enrollment 216

Complete the chart.

School Year		Grade Levels to be Served	Total Projected Student Enrollment
First Year	2012-13	K-4	120
Second Year	2013-14	K-5	144
Third Year	2014-15	K-6	168
Fourth Year	2015-16	K-7	192
Fifth Year	2016-17	K-8	216

**Notice of Intent:**

Provide a copy of the notice of intent that was submitted on or before January 11, 2011 to both the district superintendent where the charter school is proposed to be located and to the Public Education Commission.

## **Abstract of Proposed Charter School:**

Uplift Community School, a K-8 school in Gallup, NM, brings to children and families of McKinley County innovative, relevant, community-centered, project-based education and a school culture based on high quality work and self-discovery.

At Uplift Community School students and teachers are mutually engaged in relevant learning that results in meaningful contributions to their community within a nurturing environment that awakens individual voice, initiative, critical thinking, and creativity. Their work is grounded in skillful use of language, math, science, social studies and the arts, and it builds upon the dynamic, diverse cultural heritage of the region.

Expeditionary Learning is a national model that promotes rigorous and engaging curriculum, active, inquiry-based pedagogy, and a school culture that demands and teaches compassion and good citizenship. At the heart of EL are learning expeditions, interdisciplinary units aligned with state standards. The EL approach is experiential and project-based, involving students in original research—with experts—to create high-quality products for audiences beyond the classroom

Uplift Community School is based on the EL Design Principles and Core Practices and works toward a high level of EL implementation. Teachers at Uplift Community School design learning expeditions to address issues relevant to students and the multicultural community, modeling habits of work upon which the school culture is built.

**III. ASSURANCE THAT ALL GOVERNING BODY MEMBERS HAVE READ THE COMPLETED APPLICATION**

*This form must be signed by each governing body member of the proposed school and submitted with the final application. An application will be considered incomplete if it is not accompanied by this Assurance document from each governing body member.*

**SIGNED STATEMENT OF ASSURANCE THAT EACH GOVERNING BODY MEMBER HAS READ THE APPLICATION AND AGREES TO ITS SUBMISSION TO THE PUBLIC EDUCATION COMMISSION**

*(Please “copy” and paste this form for each school governing body member to sign, and then submit all signed forms with the final application.)*

STATE OF NEW MEXICO    )  
   )  
 COUNTY OF McKinley    )

1. My name is Jennifer Brown and I reside in Gallup, NM.
2. I am a member of the governing body of the proposed Uplift Community School (*name of school*) to be located at Gallup, NM. I certify that I have read the charter application in its entirety and hereby agree to its submission to the Public Education Commission.

Jennifer Brown,  
 [Printed Name]

\_\_\_\_\_  
 [Signature]

6/29/2011  
 \_\_\_\_\_  
 Date







**SIGNED STATEMENT OF ASSURANCE THAT EACH GOVERNING BODY MEMBER HAS READ THE APPLICATION AND AGREES TO ITS SUBMISSION TO THE PUBLIC EDUCATION COMMISSION**

*(Please "copy" and paste this form for each school governing body member to sign, and then submit all signed forms with the final application.)*

STATE OF NEW MEXICO   )  
   )  
 COUNTY OF McKinley    )

1. My name is   Anne Lundberg   and I reside in   Gallup, NM  .
2. I am a member of the governing body of the proposed   Uplift Community School   (*name of school*) to be located at   Gallup, NM  . I certify that I have read the charter application in its entirety and hereby agree to its submission to the Public Education Commission.

  Anne Lundberg  ,  
 [Printed Name]

\_\_\_\_\_  
 [Signature]

  6/29/2011    
 Date

**SIGNED STATEMENT OF ASSURANCE THAT EACH GOVERNING BODY MEMBER HAS READ THE APPLICATION AND AGREES TO ITS SUBMISSION TO THE PUBLIC EDUCATION COMMISSION**

*(Please “copy” and paste this form for each school governing body member to sign, and then submit all signed forms with the final application.)*

STATE OF NEW MEXICO )  
   )  
 COUNTY OF McKinley    )

1. My name is Ann Doucette and I reside in Gallup, NM.
2. I am a member of the governing body of the proposed Uplift Community School (name of school) to be located at Gallup, NM. I certify that I have read the charter application in its entirety and hereby agree to its submission to the Public Education Commission.

Ann Doucette  
 [Printed Name]

\_\_\_\_\_  
 [Signature]

6/29/2011  
 Date

#### **IV. CHARTER SCHOOL MISSION AND STATEMENT OF NEED**

The Charter School Mission Statement should communicate the essence of the school to stakeholders and to the public and should provide the focal point to which all other sections of the school's plans align. In addition, the proposed charter school and its mission must be in the best interest of the students and community that it proposes to serve.

##### **Mission:**

The Uplift Community School, in alliance with families and the community of Gallup-McKinley County, will provide a rigorous; state-standards based education to grades K-8th using an Expeditionary Learning Model ([www.elschools.org](http://www.elschools.org)) to achieve academic success for all students. The Uplift Community School will meet high expectations for achievement by producing meaningful, high quality work that engages cultural diversity, and integrates inquiry and learning in literature, science, social studies and the arts, while building skills in math, reading and writing. The Uplift Community School will develop leadership and teamwork through a process of planning, reflection and revision and a school culture that values individual initiative and voice.

##### **Goals:**

Uplift Community School will know it is achieving its mission through the following goals:

1. Through the use of Expeditionary Learning Core Practices, by May of 2016 all students will demonstrate 80% proficiency on state standards in math and reading as measured by annual state standardized tests.
2. By May of 2016, the school will achieve a minimum average score of 3, "highly implementing", in the annual Implementation Review as performed by Expeditionary Learning using the four-point assessments based on Expeditionary Learning Core Practices.
3. By May of 2016, the school will demonstrate 80% parent involvement in school activities as documented by attendance logs.

##### **Statement of Need:**

The demographics of Gallup and the surrounding area, McKinley County, reflect a unique combination of cultural diversity and economic disparity. The following student statistics reflect this diversity. In 2009, grades 3-5, 80% of students were Native American (predominately Navajo), 13% were Hispanic with less than 7% identified as Caucasian. Consequently, of the nearly 2500 Gallup-McKinley County students enrolled in grades 3-5 in 2009, 44% were English Language Learners (ELL). Children entering the county's Kindergartens are roughly a 1.5 to 2.0 years behind their New Mexico peers in language and cognition based on data gathered during the 2010 Kindergarten pre assessments.

The county's poverty rate is 34.2%, and according to U. S. Census Bureau data, 32.8 percent of children within the county are from families with incomes below the poverty line. Census data shows that one-third of the children live in homes without electricity or indoor plumbing. Based on Gallup McKinley County Schools' Title I data in 2009, grades 3-5, indicate that 83% of Gallup-McKinley County students are on Free and Reduced-price Lunches. This statistic reflects that McKinley County is one of the poorest counties in the nation.

In 2010, only two elementary schools out of 19 in Gallup-McKinley County made Adequate Yearly Progress (AYP). This places all other elementary schools at some level of the restructuring process. School improvement plans that have been implemented by restructuring schools have not been able to meet standards set to attain AYP. Three Bureau of Indian Education (BIE) elementary schools out of seven in McKinley County made AYP in 2009-2010 by the designation "Safe Harbor". This means they made at least a 10% gain in both reading and math in one year.

On the 2009 (most current available data) New Mexico Standards Based Assessment (NMSBA) in reading 75% of Caucasian students scored proficient or higher in grades 3-5. At that same grade level, 51.8% of Hispanic students and 30.6% Native American students scored proficient or higher. NMSBA Math scores for grades 3-5 show 64.7% of Caucasian students scored proficient or higher where as 39.4% of Hispanic students and 24.1% of Native American students scored proficient or higher. These results clearly show there is a larger achievement gap for our Hispanic and Native American populations in the Gallup McKinley County District.

Although the overall attendance rate for students in Gallup-McKinley County schools was 93.9% in 2009, the graduation rate from high school was 52% and the drop out rate was 7.4%. Students who drop out of school become disengaged from school at an early age. Statistics show that every year the percentage of students who are proficient in math and reading drops. Students are struggling to make the educational growth needed to sustain educational success. The Uplift Community School will work individually with students to help them make the educational strides that they need to succeed.

When asked why students were dropping out, the second most stated reason was disinterest in school. The Uplift Community School will engage students in the educational process through student generated learning expeditions. Students attending Uplift Community School will benefit from a small, close knit learning community with long term support systems and strong educational structure.

Uplift Community School will contrast with surrounding elementary school programs by offering an innovative educational model known as Expeditionary Learning. Inherent in the EL model are five core practices that will help meet the needs of our unique population. These core practices include:

- **Learning Expeditions** which consist of implementing project-based learning that designs products and linked projects incorporating fieldwork, local community expertise and service learning producing high-quality student work. Students of the Uplift Community School will benefit from a hands on approach to education where the community and cultural diversity is incorporated into the fabric of their learning.

- **Active Pedagogy** which incorporates teaching reading and writing across the disciplines, teaching math, science and social studies through an inquiry-based approach, actively using the arts as an instructional tool and developing effective instructional and assessment practices. Students of the Uplift Community School will excel in an environment with an integrated approach to curriculum where practice in math, reading, and writing is incorporated into the specific interest areas of the students.
- **Culture and Character** which actively involves the parents, teachers, students and community to form a safe, respectful and orderly school environment while fostering the development of a strong school culture that promotes equity and high expectations. All students at Uplift Community School will excel and be more engaged in a healthy learning environment with a support system that includes family, school, and community.
- **Leadership and School Improvement** stressing teacher training in EL strategies while building partnerships with parents and community members in order to improve student achievement and school improvement plans. Uplift Community School students' achievement will be assured because there are connections between all parts of their lives.
- **Structures** that allow time for curriculum planning and development and provide staff the opportunity to revise the curriculum and its delivery in response to the student needs identified at each grade level. Students at Uplift Community School will be better served by teachers who have the time to plan, reflect, and revise curriculum and lessons to meet student needs.

## V. EDUCATIONAL PLAN

The educational plan should describe who the school expects to serve; what the students will achieve; how they will achieve it; and how the school will evaluate performance. It should provide a clear picture of what a student who attends the school will experience in terms of educational climate, structure, materials, schedule, assessment and outcomes.

### A. CURRICULUM FRAMEWORK

#### 1. Philosophy and Approach to Instruction

Uplift Community School will follow the educational philosophy and approach of Expeditionary Learning (EL). EL is a national, non-profit organization that . . .

“. . . promotes rigorous and engaging curriculum, active, inquiry-based pedagogy, and a school culture that demands and teaches compassion and good citizenship. At the heart of EL are learning expeditions, interdisciplinary units aligned with state standards. The EL approach is experiential and project-based, involving students in original research—with experts—to create high-quality products for audiences beyond the classroom.” (Expeditionary Learning, 2010)

#### **Expeditionary Learning Design Principles and Core Practices:**

Expeditionary Learning is based on a set of Design Principles and Core Practices that will be incorporated into all aspects of Uplift Community School’s educational approach. The Design Principles are the fundamentals of the educational philosophy. The Core Practices assure that the Design Principles will be met.

<b>Design Principles</b>	<b>Core Practices</b>
· Self-discovery	I. Learning expeditions implemented across the curriculum
· The having of wonderful ideas	II. Active pedagogy and effective instructional practices
· Responsibility for learning	III. School and individual culture and character
· Empathy and caring	IV. Leadership and school improvement
· Success and failure	V. Specific structures are used to ensure student and adult learning and that adults know students well
· Collaboration and competition	



- Diversity and inclusion
- The natural world
- Solitude and reflection
- Service and compassion

### **Why Expeditionary Learning?**

The Expeditionary Learning approach addresses the holistic needs of our children, prepares them to meet high educational expectations, and complements the values of our local community. The EL model possesses many specific strengths. First, students in the Gallup area bring a diversity of experiences and cultures to school. While these experiences do not always align with what is considered to be “mainstream” culture, they are valuable and can greatly contribute to student learning. Expeditionary Learning engages students in cross-curricular, inquiry-based study that allows children to build on these experiences and prior knowledge as they explore new content. As a result, children learn content in more personal, meaningful, and deep ways (Beyer, 1991).

Second, Expeditionary Learning provides students with opportunities to develop strong critical thinking skills as they explore content and their world, develop original products, work in groups to solve problems, and engage in self-reflection. This rich learning, with its emphasis on problem-solving and collaborative work, prepares students for success as they make choices about their future and participate as citizens and workers. The Partnership for 21st Century Skills writes that our communities will need “more educated workers with the ability to respond flexibly to complex problems, communicate effectively, manage information, work in teams and produce new knowledge” (Partnership for 21st Century Skills, 2008). Students with these skills will be better able to compete in the global economy and have the potential to bring higher paying jobs to the community. The Uplift Community School will ensure that our students can fulfill this societal need in general. In addition, we will help students envision the application of twenty-first century skills both in their personal trajectory and in the development of their local community.

Third, Expeditionary Learning is a model that allows students to achieve high expectations in all content areas. Using the integrated approach embedded in Expeditionary Learning, students learn to think, read, and write according to the conventions for each discipline. As students engage in expeditions, they examine essential issues and create a base of knowledge for each discipline. For example, social studies units might teach students to interpret primary source documents while science units might introduce the elements of the scientific method. Students will apply these elements to create new meaning and act as “historians” and “scientists” as they design original products. Through such inquiry, students at the Uplift Community School will achieve true mastery of skills and content that will allow them to apply their knowledge with flexibility and creativity in a variety of contexts. The effectiveness of such integrated curricula is

supported by extensive research. Students who are required to apply their learning in new contexts understand and achieve at a higher level of rigor (Gardner, 1995). Furthermore, studies of the effects of curriculum integration show that students learn more content overall through integrated approaches (Glatthorn & Jailall, 2008). The commitment of the Uplift Community School to provide these rigorous integrated experiences will result in the ability of all students to meet high expectations on a variety of measures, including the state assessments, and in authentic life situations.

Also, Expeditionary Learning encourages the use of the knowledge and expertise available within the Gallup community and our families. This model incorporates extensive field-based learning including field trips for the purpose of research and collaboration with local experts. Furthermore, students will be encouraged to develop an outlook of public service by participating in yearly service learning projects. We believe this will allow students to understand resources within their community and deepen their connection to their community and families. They will also recognize their own ability to make a positive contribution to their community and family, both now and in the future.

Finally, presentations of final products from student expeditions provide opportunities for positive interaction with families and the community. The sharing of work creates a welcoming setting for families to engage in their children's learning and build relationships with school staff that support and encourage student learning. Research shows that students with involved families demonstrate greater success (Jeynes, 2005). The Uplift Community School will actively pursue family involvement to ensure all families have the support and means they need to help their children succeed. We will also work to ensure that these relationships support a two-way dialogue in which families and the community participate in true partnership with the school, building a shared vision for children's learning that grows over time.

Overall, the Uplift Community School believes that the Expeditionary Learning model will promote our students' development into good, intelligent people. The rigorous experiences offered through learning expeditions will build strong critical thinking skills and deep content knowledge. Expeditionary Learning focuses on "habits of mind" which is characterized by a person strongly disposed toward critical thinking. It includes a courageous desire to follow reason and evidence wherever they may lead, open-mindedness, foresight, attention to the possible consequences of choices, a systematic approach to problem solving, inquisitiveness, creativity, fair-mindedness, and maturity of judgment. The emphasis of Expeditionary Learning on habits of mind will equip students with the passion for learning, determination, and sense of purpose and compassion that will allow them to use their academic knowledge to build happy, productive lives. We believe that this academic and affective learning goes hand-in-hand and is mutually supportive. In the context of our community, where successful students often seek opportunities elsewhere, we believe we must educate students with the creativity and perseverance to perceive and create new futures and opportunities within our local community.

### **Expeditionary Learning Results in Improved Educational Performance of Students.**

Expeditionary Learning works with each partner school to provide a comprehensive set of professional development experiences designed to raise student achievement in both test scores and the quality of work they produce and to provide them with the habits of mind and skills they

will need to succeed in college and beyond. On-site professional development, job-embedded coaching for teachers and school leaders, and off-site institutes in such areas as reading, writing, math, science, and assessment help to create high-achieving schools and change unmotivated students into active, engaged learners.

Expeditionary Learning currently contracts with 150 schools across the country with a range of grade levels, governance models, and geographic locations. Eighty-one of these are Title I schools that serve almost 25,000 students and 2,100 educators in 23 states. Two-thirds of these Title I schools are located in urban areas, two-thirds of the students are non-white, and a significant percentage of students are English language learners or receive special education services.

The School Performance Data Report for EL (Appendix F) shows that schools at a high level of implementation of EL Core Practices see significant gains in student achievement. EL students outperformed their district peers in reading by 9.3% in 2007-2008, and by 3.6% in math.

For students who are Black, Hispanic, economically disadvantaged, or designated as Limited English Proficient (LEP), as well, Expeditionary Learning schools provide an opportunity to achieve higher performance expectations. Students meet these expectations by creating inspiring products that demonstrated measurable 21st century skills at every grade level.

Demographic statistics of EL Schools during the 2007-2008 school year show that EL schools are inclusive:

- Non-white—52%
- Free and Reduced Price Lunch Eligible(FRPL)—45%
- Special Education(SPED)—14%
- English Language Learners—11%

The percentage of Native American students currently served by EL Schools is just 2%; therefore little data is available for this subgroup of particular significance within our community. For other sub-populations, however, including Black, Hispanic, FRL, and SPED students in “implementing” schools outperformed their district peers by more than 10% in Reading and more than 7% in Math in 2007-2008.

Expeditionary Learning has a history and experience with New Mexico schools. Roots and Wings, a charter school near Questa, has repeatedly performed above the local district on the New Mexico Standards Based Assessment. In addition, EL works with Rio Gallinas Charter School for Ecology and the Arts in Las Vegas, Vista Grande High School in Taos, the Penasco School District, and the Santa Fe School for the Arts and Sciences. EL has both local residential staff support for the schools in New Mexico as well as a regional and national staff of educational experts to provide on-site technical assistance.

### **Alignment of School Mission to Expeditionary Learning Philosophy and Curricular Approach**

The mission of the Uplift Community School is strongly aligned with the Expeditionary Learning philosophy and approach.

- Students will meet high expectations for achievement as they engage in learning expeditions, develop critical thinking skills, work within the conventions of a variety of disciplines, and produce high level work.
- Learning expeditions and products are built on student prior knowledge and unfold within the context of their community. The activation of prior knowledge and authenticity of instruction lead to greater success.
- As students learn in the spirit of adventure, they will persist in solving difficult real-world problems and acquire habits of mind that will increase achievement and be useful to them in future endeavors.
- The cross-curricular approach our school embraces emphasizes both strong disciplinary knowledge and the connections between disciplines. This approach leads to greater mastery and understanding of content.
- Our school acknowledges that our school community is culturally diverse. Learning experiences will incorporate this diversity, encouraging students to see value in who they are and where they come from. Students who are self-confident and self-motivated have the will and sense of purpose to achieve in school settings.
- The high quality work students produce will be shared with the community and families, thus creating more opportunities for positive interaction and involvement between the school, families, and the community. Parent and community engagement leads to increased student success.

### **Alignment of School Mission and Expeditionary Learning Framework**

#### **Uplift Community School Mission**

*Help students meet high expectations for achievement as they do meaningful, high quality work.*

Expeditionary Learning is built on the foundation of learning expeditions. These expeditions are the driving engine that guides the learning experiences of students and produces strong achievement. This work students do in EL is both academically rigorous and intrinsically meaningful.

At Uplift Community School, we believe that teacher development and collaboration are integral to our success. In order to accomplish our mission of helping students meet high expectations, we have designed strong structures to foster a professional community that engages in rigorous work and reflection.

The work of skillfully designing and delivering instruction to ensure the engagement and success of all students is challenging work. Uplift Community School will develop leadership among all staff, and among students themselves through teams, to ensure rigorous learning experiences.

#### **Alignment of EL Core Practices**

##### **I. Learning Expeditions:**

- Designing compelling topics and guiding questions;
- Incorporating fieldwork, local expertise, and service learning;
- Producing and presenting high quality student work.

##### **III. Culture and Character**

The mission for Uplift Community School is rooted in a vision for continuous learning, both for students and staff. We set aside considerable time for learning (as reflected in our extended day and ample professional development offerings), believing that this time allows room for critical thought, exploration, and depth of learning. Furthermore, this time will allow us to know our students, their personal interests, and their strengths and needs so that we can build strong relationships that are supportive or learning throughout students' experience at Uplift.

- Developing a professional community

#### **IV. Leadership and School Improvement:**

- Providing leadership in curriculum, instruction, and school culture;
- Sharing leadership and building partnerships.

#### **V. Structures:**

- Designing time for student and adult learning;
- Creating structures for knowing students well.

#### ***Engages culturally diverse families and communities.***

It is the mission of Uplift Community School to ensure that families and communities are engaged in the learning our students do. Learning Expeditions facilitate this involvement in many ways. They allow us to design expeditions relevant to the greater Gallup community and involve community and family members as teachers. In addition, presentations of student work (through exhibitions, performances, student-led activities, etc.) bring parents and community members to school in an atmosphere of excitement and accountability.

The Uplift Community School is committed to valuing our local community and families and their diversity. The EL framework is consistent with our philosophy and will enhance our ability to realize this portion of our mission.

#### **I. Learning Expeditions:**

- Designing compelling topics and guiding questions;
- Incorporating fieldwork, local expertise, and service learning;
- Producing and presenting high-quality work.

#### **III. Culture and Character**

- Building school culture and fostering character
- Fostering a safe, respectful, and orderly community
- Engaging families in the life of the school

***Integrates inquiry in the mathematics, literature, science, social studies, the arts, leadership, and collaboration.***

At Uplift, our curriculum will incorporate inquiry-based practices in all the content areas to ensure student success and engagement in learning. We espouse the perspective of EL that active teaching, which involves students in the process of exploration and creation, leads to a higher level of learning. In addition, we will continuously monitor student learning through the use of a variety of assessments and refine our active teaching practice based on this data.

Along with active pedagogy, our instruction emphasizes leadership and collaboration, as well as the habits of minds put forth in the Design Principles of EL. We believe that learning goes hand-in-hand with habits of mind such as perseverance in the face of difficult problems and self-responsibility. We will build a learning-focused school culture through student engagement in learning expeditions, purposeful discussion and integration of the design principles, and structures for self-reflection and community such as Crew time.

**II. Active Pedagogy:**

- Inquiry-based math, science, social studies, learning in and through the arts;
- Using effective assessment practices.

**III. Culture and Character:**

- Building school culture and fostering character;
- Ensuring equity and high expectations;
- Fostering a safe, respectful and orderly community.

**2. Description of the Curriculum**

Uplift Community School will develop the curriculum in the planning year. A description of that plan and a timeline are included. The Reading and Math curriculum design are described as well as how the Expeditionary Learning Model will tie into the overall curriculum.

## **Learning Expeditions**

The Uplift Community School will implement an integrated curriculum, at the center of which is the use of learning expeditions. Learning expeditions are units that “feature linked projects that require students to construct deep understandings and skills to create products for real audiences” (Expeditionary Learning, 2003). Learning expeditions are designed around state standards and focus on guiding questions that allow students to master this content in meaningful ways. At Uplift Community School, students will spend at least two hours each day engaged in the exploration of content through learning expeditions. These expeditions will simultaneously develop understanding in a variety of content areas as students read and write to deepen their disciplinary knowledge in math, social studies, and science. For example, students who are studying the local history of the Gallup community might learn how to collect and read primary source documents and formulate a timeline of Gallup’s history. Using data they collect, students would then develop questions for an oral history project in which they interview community members. Students might share their final oral history projects through dramatic presentations at the children’s library.

Learning expeditions will vary in the amount of time they last, from a matter of weeks to multiple months depending on the complexity of the topic and the number of standards to be addressed. Uplift Community School will expect that students will learn approximately five science and five social studies standards with depth during each quarter. At the same time, the instruction of the math and reading standards will be integrated into the expeditions for science and social studies through writing products, text-based knowledge of primary sources, and the variety of real-life math outcomes that student will be engaged in. Teachers and students will develop high expectations for outcomes for each learning expedition, compiling these expectations in specific and comprehensive rubrics for the expedition. Rubrics will be aligned with the state standards in all relevant subject areas to ensure the learning within expeditions is moving students toward mastery of these standards. The elements of a learning expedition include:

- Focused and Narrowed Topic in a Context
- Guiding Question
- Immersion, Kick-off, or Hook
- Learning Targets
  - The “Big ideas” of the disciplines
  - Content, skills, character,
  - Local, state, and district standards
  - Strong emphasis on teaching reading and writing
- Learning experiences planned like the over-all expedition
  - Projects and products that show understanding
    - Real audiences
    - Craftsmanship (multiple drafts and critique)
    - Tasks that meet portfolio requirements
  - Ongoing literacy experiences
  - Significant instructional events (labs, simulations, role-plays)
- Evidence that students have met standards
- Seamless integration of technology
- Authentic assessment
- Service

- Authentic Research
  - Fieldwork
  - Primary sources, experts, and data
- Culminating Event or Exhibition
- Reflection and Debriefing Time
- Physical Adventure, when possible

Uplift Community School recognizes that many of our students will come to us with deficits in reading and math. As a result, we will provide set times each day for instruction in Literacy and Mathematics. All learning expeditions will reinforce the use of reading and mathematics in the real world setting of the expeditions making math and reading more relevant to the students.

### **Literacy Instruction**

The Uplift Community School will teach reading through a balanced literacy approach that emphasizes rigorous academic expectations and authentic literacy experiences. Current reading research acknowledges that reading is made up of a variety of interrelated processes and competencies including phonemic awareness, phonics, comprehension, fluency and vocabulary knowledge (National Reading Panel, 2010). Research shows that many students, particularly those with fewer early literacy experiences, benefit greatly from explicit instruction in letters and sounds in the early grades. At the same time, repetitive or limited skills-based instruction can decrease motivation and enthusiasm for reading over time (Snow, Burns & Griffin, 1998). For these reasons, the Uplift Community School will provide explicit instruction within the context of engaging literature, meaningful interaction, and a focus on comprehension

We will construct a curriculum based on strong principles of balanced literacy instruction.

During the reading class time, we will teach reading based on the gradual release of responsibility model (Pearson & Gallagher, 1983) in which teachers first model a strategy, then work with student to develop competence in the strategy, then support students as they apply the strategy independently. Second, reading instruction will follow a reading workshop model. Reading workshop is a model in which students develop skills as independent readers through a variety of formats that involve different levels of support and emphasize the foundational reading competencies. Uplift Community School’s reading workshop will incorporate the following strategies: read aloud, shared reading, independent reading, phonics or words study, and a combination of interactive writing and writing workshop. The emphasis, time spent, and design of each component will shift throughout the grade levels based on the needs of students as they grow in reading (see table below).

While we will not purchase a scripted curriculum for reading, we will rely on cornerstone professional texts and resources to support literacy instruction. Uplift Community School will provide training for teachers in reading workshop using texts produced by Lucy Calkins, the seminal academic in this area, and the Teacher’s College Reading and Writing Project.

Professional development texts will include the following: *Units of Study: A Curriculum for the Reading Workshop, Grades 3-5*, *Units of Study for Primary Writing*, *Units of Study for Writing, Grades 3-5* (both published by Firsthand), *Growing Readers: Units of Study for the Primary Classroom* (Collins, 2004), *Teaching with Intention* (Miller, 2008), *Strategies that Work* (Harvey & Goudvis, 2007), *On Solid Ground: Strategies for Teaching Reading K-3* (Taberski, 2000), *Interactive Writing: How Language and Literacy Come Together, K-2* (McCarrier, Fountas, & Pinnell, 1999).



Component	Average Daily Allotted Time	Description
<b>Read Aloud</b>	20-30 minutes	Teachers model and guide students in the application of comprehension strategies as they read aloud. During this time, teachers also teach specific reading content standards from the New Mexico standards. Students develop their comprehension skills as they discuss in groups and partnerships. Texts selected will correlate with topics for expeditions.
<b>Shared Reading</b>	15-20 minutes (Grades K-1) 20-30 minutes (Grades 2-3) 30-40 minutes (Grade 4-8)	In shared reading, students participate to a greater extent in reading and comprehending texts. The whole class (or small groups within the class) read the same text together. These texts may be big books in the lower grades or class sets of non-fiction texts, picture books, magazine articles, or novels in the upper grades. Teachers guide students in learning reading standards and applying comprehension skills. Students develop facility in discussing and writing about texts. They refer back to the text and select evidence from the text to support their thinking. Texts selected will correlate with topics for expeditions.
<b>Independent Reading/ Guided Reading</b>	20-30 minutes (Grades K-1) 30-40 minutes (Grades 2-3) 40-60 minutes (Grades 4-8)	During independent reading, students select “just right” books that are on their reading level. This is a time of day during which students have access to texts that are at their developmental level. Teachers meet to conference with students at least once a week or more for students who are behind grade level expectations and need additional support. Teachers and students will set guidelines to ensure accountability during this time so that students read a large amount of text, read a texts that meet their interests from a variety of genres, and demonstrate strong comprehension as they speak and write about their reading.
<b>Phonics/ Word Study</b>	30-40 minutes (Kindergarten) 30 minutes (Grade 1)	<b>Kindergarten:</b> Students will spend a significant amount of time each day developing their awareness of sounds and words and learning the names and sounds of letters. Students will engage in a variety of short activities (phonemic awareness games including rhyming and segmentation, sound matching games

	<p>20-30 minutes (Grades 3-8)</p>	<p>with objects, letter chanting and writing, sight word learning, etc.).</p> <p><b>Grade 1:</b> Students will spend significant time each day learning sight words, learning letter sounds and patterns, and blending words both in connected text and in isolation.</p> <p><b>Grade 3-8:</b> Students will spend time working on increasingly complex reading and language skills (reading and spelling multisyllabic words, adding inflectional endings, using homophones correctly, applying knowledge of Greek and Latin prefixes, roots, and suffixes). The text <i>Words Their Way</i> (Bear et al., 2007) and the standards will be a guide for sequence of instruction in these areas.</p>
<p><b>Interactive Writing/ Writing Workshop</b></p>	<p>30 minutes (Grade K-1)</p> <p>40 minutes (Grades 2-3)</p> <p>40-60 minutes (Grades 4-8)</p>	<p>Students will spend a significant amount of time writing each day. In kindergarten and first grade, students will spend a significant amount of time writing with teacher support in interactive writing. They will focus on developing ideas and communicating these ideas clearly in print with plausible spelling and strong punctuation. In the upper grades, students will participate in writing workshop as they develop writing for a variety of purposes in a variety of genres. Writing workshop will be incorporated into expeditionary learning, as students write about their developing content knowledge and create textual products (e.g. stories, non-fiction books, poems, interview, and plays). In addition, students will receive strong writing instruction in the 6 traits (organization, ideas, voice, word choice, sentence fluency, and conventions) through teacher modeling and practice. As students move toward the upper grade levels, they will be increasingly encouraged to create texts that mirror the conventions of genres within a discipline (e.g. lab reports, literary essays, mathematical proofs) and reflect on the quality of their work in relation to these conventions.</p>

This rigorous, balanced literacy approach to reading and writing will support students at the Uplift Community School as they meet high expectations for achievement through their learning expeditions and demonstrate the proficiency of state standards.

## **Math Instruction**

Uplift Community School will research and select a math program that begins with the premise that students can and must learn math at a higher level of understanding and practice than ever before. Some programs being investigated include: Everyday Math, Investigations, and Singapore Math.

The chosen curriculum will encourage teachers and children to explore math by investigating data, gathering and analyzing data, probability, geometry, patterns, and algebra. Inquiry-based instruction and lesson planning allows students to explore the process of finding an answer rather than just a number as an answer. Mathematics will be taught in a 60 minute block with an additional 30 of intervention time each day. Teachers will deliver whole group mini-lessons to students before students split into small instructional groups. Teachers and Educational Assistants will deliver small group instruction in order to provide opportunities for pre-teaching, re-teaching and/or enrichment.

The selected math program must include:

- Problem solving about everyday math situations;
- Linking past experiences to new concepts;
- Sharing ideas through discussions;
- Developing concept readiness through hands-on activities and explorations;
- Cooperative learning through partner and small group activities;
- Increasing understanding of basic math facts;
- Providing ongoing review and applications, reinforcement and enrichment;
- Solving problems using multiple strategies;
- Using mathematics in daily classroom routines;
- Providing a variety of assessment opportunities (student observations, math boxes, unit tests, mid -year assessments and end of year assessments); and
- Enhancing home-school partnerships and better parent understanding of these new concepts.

## **Plan for Curriculum Development**

As stated above, components of the Uplift Community School curriculum, in particular the literacy curriculum and the learning expeditions will be developed by teachers. We expect that our teachers will develop curricula that are optimally suited to the needs and experiences of our students and local community. Our school has a strong plan for equipping our teachers with the skills and knowledge that will allow them to develop a rigorous, effective curriculum and continuously improve over time. A key to teacher development of the curriculum is our partnership with Expeditionary Learning which will provide extensive development services to our teachers. EL will place a School Designer with Uplift Community School to ensure that we implement the EL model at a high level. The School Designer will be present at all professional development activities planned at the Uplift Community School.

Uplift will also set aside significant amounts of time for teacher collaborative work so that teachers are able to plan strong lessons and units, reflect on their teaching practices, investigate data, and share ideas. Teachers will come together for a Summer Institute for a minimum of three weeks during the summer to be trained in and participate in curriculum mapping and writing. Exemplars of quality learning expeditions from other schools across the nation will be

shared with our teachers. New Mexico’s standards, by grade levels, will be discussed and examined for connections and natural themes or topics. Teachers will propose ideas for learning expeditions and present their concepts to their colleagues for feedback and critique. Teachers will also spend significant time developing expeditions and writing lessons so that they will be prepared to begin teaching at the beginning of the school’s first year. Teachers will utilize the learning expeditions planning template as they engage in this work.

Throughout the year, teachers will also participate in weekly professional development release time on Wednesdays from 12:00 p.m. to 4:00 p.m. This time will be used for ongoing professional development from the School Designer, reflection on instruction, study of data, and ongoing planning and development of expeditions. Uplift Community School views this time as essential to the quality of work our teachers will do and the foundation for the collaborative culture of our school. Through the leadership of our director and School Designer as well as clear structures for collaborative work, we will ensure that this time is used for honest reflection and continuous improvement that enhances student learning.

**Fall 2011**

Once the Federal Planning Grant is received, the Governing Board will hire a coordinator to finalize a location, make any changes needed to adhere to federal, state and local regulations. Also organize and order all supplies needed to open the school.

**April 2012**

The Governing Board will hire a director for the Uplift Community School. The director will gather resources for implementing Expeditionary Learning as well as reading and math curricula. This director will also plan summer and school-year professional development with Expeditionary Learning and hire a School Designer. The EL School Designer helps the director create a school using the EL design principals.

Director will hire administrative assistant and janitor in April as well.

**July 2012**

The director of Uplift Community School will hire skillful and engaged teachers who are eager to participate as founding teachers in a charter school.

Teachers will attend the three-week Summer Institute to build the knowledge and cultural foundation for our school. During this time they will:

- receive training in Expeditionary Learning and the other components of the Uplift curriculum
- create a curriculum map for all grade levels in all subject areas
- plan all of the curricular units for the first nine weeks and go beyond this if possible

**School Year 2012-**

Staff will participate in ongoing professional development provided by the

**2013**

school director, the School Designer, Expeditionary Learning, teachers themselves, and other consultants as needed. This professional development will include:

- being observed and observing each other, then receiving and providing thoughtful feedback
- reflecting on expeditions that have been taught and refining them for use in the future
- attending state and national conferences in EL
- continuing to write and plan unit plans and daily lessons
- reflecting on the results of expedition rubrics and short-cycle assessments to address student needs more effectively

**Spring and Summer 2013**

Staff will critique the development of the previous year's curriculum and pacing to identify the strengths and limitations of the previously taught learning expeditions and curriculum. They will look at both qualitative and quantitative data to guide decision-making and planning for the upcoming school year.

Staff will plan the second-year rotation of learning expeditions that will be utilized by 1<sup>st</sup>/2<sup>nd</sup> and 3<sup>rd</sup>/4<sup>th</sup> groupings. The 5<sup>th</sup> grade teachers will plan the first-year learning expeditions.

New staff will be trained and preparations made for the expansion to 5<sup>th</sup> grade.

### **3. Alignment with NM Standards**

Uplift Community School will align all instruction with NM Standards. This will be done through the creation of a quarterly curriculum map for each grade level. The maps will be created by the grade level teacher with input from all staff to ensure all standards are addressed. Included here is an example of the 1<sup>st</sup> Quarter curriculum map for 3<sup>rd</sup> grade.

While this work is not complete, it conveys the type of planning our teachers will do. They will finish curriculum maps for expeditions and for language arts, and then align the selected math curriculum to these maps. As the remaining quarters of the curriculum maps are completed, teachers will ensure full coverage of the standards in reading and in math. In addition, teachers will create:

- Rubrics describing learning expectations for the end of each unit, including the level of rigor at which students will be expected to demonstrate mastery of each standard (scope and sequence for each unit will be backwards-planned from these rubrics)
- Day-by-day scope and sequence for each unit within each subject
- Daily lessons for each unit

We believe that the curricular map sample conveys our capacity to lead teachers in creating rigorous, standards-based units that emphasize both meaningful learning experiences and high academic expectations. Please also see the planning template below that will be used for learning expeditions.

Curriculum Map for 3<sup>rd</sup> Grade - Sample of Learning Expedition for 1<sup>st</sup> Quarter

**Yearlong Expedition Theme: *Woven Together: The Geology, Culture, and Biology of the Uplift Plateau***

**Learning Expeditions**

**Expedition 1. Shaped by the Landscape (14 weeks)**

In this expedition, third grade students will examine the significance of geological landforms to our local community. Students will be guided by the essential questions “How was our local landscape shaped over thousands of years? How has it in turn shaped our lives today and in the past?” We will begin our study with a kick-off field trip to the Bandera Ice Cave and El Malpais near Grants, New Mexico to collect photographs and field notes of unique landforms for further study. Students will engage in hands-on activities to solidify their understanding of the basic geological processes of uplift and erosion and apply these to identifying local landforms and the geological processes that led to their formation. We will also examine human changes to the local landscape and discuss how these are similar and/or different from geological changes. Students will also explore ways of mapping geological features, include satellite mapping and topographic maps. Local experts in mapping, such as surveyors and geologists, will be included as teachers. Finally, students will consider how the geology of our local area has shaped life on a cultural, social, economic, and perhaps even political level. Students will read historical accounts of exploration of the Gallup and Navajo Nation area and consider other local sources as well. They will look at the effects of geology on the economy, from the presence of natural resources such as uranium to the influence of beautiful geological formations on the tourist industry. Guest artists will lead students in art projects in which they represent local landforms through different media. The culminating project for this investigation will be the creation of a 3-D map of the greater Gallup area with attached descriptions of significant landforms, their formation, and their significance to the community. These will be presented in written form with an accompanying digital or video component.

**Science Standards:**

Benchmark II: Know the structure and formation of Earth and its atmosphere and the processes that shape them.

1. Know that Earth’s features are constantly changed by a combination of slow and rapid processes that include the action of volcanoes, earthquakes, mountain building, biological changes, erosion, and weathering.
2. Know that fossils are evidence of earlier life and provide data about plants and animals that lived long ago.
4. Identify how water exists in the air in different forms (e.g., in clouds and fog as tiny droplets; in rain, in snow, and hail) and changes from one form to another through various processes (e.g. freezing/condensation, precipitation, evaporation).

**Social Studies**

K-4: Benchmark II-A: Identify and use the mapping tools of scale, compass rose, grid, symbols, and mental mapping to locate and draw places on maps and globes.

K-4: Benchmark II-B: Describe how human and natural processes can sometimes work together to shape the appearance of places.

K-4 Benchmark II-D

2. Describe how physical processes shape features on the Earth’s surface.

K-4 Benchmark IV-A

2. Define and categorize resources (e.g. human, financial, natural)

3. Identify a variety of products that use similar resources.

**Expedition 2. Renewable or Not?: The Future of Energy in the Southwest**(14 weeks)

**Expedition 3. Amazing Adaptations: Biology of the High Desert** (14 weeks)

***Curriculum Map for 3<sup>rd</sup> Grade - Sample Language Arts Units for 1<sup>st</sup> Quarter***

	<b>Word Study/ Language Study Pacing</b>	<b>Reading</b>	<b>Writing</b>
<b>Quarter 1</b>	<p><b><u>Word Study</u></b></p> <p><b>Sight Words</b> Learn 3 sight words that involve more complex and unusual spelling (e.g. through, enough) each week.</p> <p><b>Spelling Patterns</b> Review the following spelling patterns: all short vowels, all common and lesson common long vowels (e.g. for Long A: ai, ay, a_e, along with less common spellings such as “eigh” and “aigh”). Apply these patterns to spell words. Also, find examples in texts</p>	<p><b><u>Unit 1: Reading Is Thinking: What should our brains to when we read? (4 weeks)</u></b></p> <p>In this beginning-of-the-year unit, students will review and practice the habits of strong readers. Through read-alouds, shared reading participation, and mini-lessons during reading workshop, they will understand the importance of strong comprehension in reading and solidify strategies that will underlie their reading growth throughout the year. These will include strategies for: monitoring and repairing comprehension (rereading, retelling to check for understanding, etc.), decoding multisyllabic words, figuring out the meaning of unknown words, and developing ideas about the text.</p> <p><b><i>Standards for this unit:</i></b></p>	<p><b><u>Unit 1: What is Writing Workshop? (6 weeks)</u></b></p> <p>This unit sets the tone for writing workshop for the year and introduces the tools of writing (writer’s notebook, folders), the writing process (pre-writing, drafting, revising, editing, publishing), and the specific expectations for writing workshop (e.g. quiet atmosphere, productivity). Students will work in the genre of personal narrative during this first unit, referring to mentor texts such as <i>Fireflies</i> by Judy Brinkloe to develop their understanding of this genre. They will produce at least one personal narrative related to an expedition experience.</p> <p><b>Strand II: CS II:</b> Benchmark II-C:</p>



	<p>to discuss how these patterns can be used to decode multisyllabic words with fluency.</p> <p><b>Week 1:</b> Short A, O  <b>Week 2:</b> Short E, I, U  <b>Week 3:</b> Spellings for Long A (ai, ay, a_e, eigh, aigh)  <b>Week 4:</b> Spellings for Long E (ea, ee, -y at the end of a word; contrast “ea” that spells short e)  <b>Week 5:</b> Spellings for Long I (i_e, igh, -y, i)  <b>Week 6:</b> Spellings for Long O: (o-e, oa, ow)  <b>Week 7:</b> Spellings for Long U and the sound /oo/ (oo, ue, u_e, ui)  <b>Week 8:</b> Spellings for the sounds /oi/ and /ow/ (oi, oy, ow, ou)  <b>Week 9:</b> Other Short O Spellings (a, au, aw, augh)</p> <p><i>Language Focus:</i></p> <p><b>Strand II: CS II:  Benchmark II-b:</b>  2. Use correct capitalization and punctuation. This</p>	<p><b>Strand 1: CS 1:</b>  Benchmark 1-A:  <b>A.</b> Interact with text before, during and after reading, listening, or viewing to comprehend by:</p> <ul style="list-style-type: none"> <li>• b. making predictions,</li> <li>• c. asking questions</li> </ul> <p>Benchmark I-D</p> <ol style="list-style-type: none"> <li>4. Apply phonics and structural analysis to decode words.</li> <li>5. Apply context clues to decode unknown words.</li> <li>6. Use a variety of strategies to comprehend text (e.g. re-read, read ahead, ask for help, adjust reading speed, question, paragraph retell.)</li> </ol> <p><b><u>Unit 2: How Stories Work (5 Weeks)</u></b></p> <p>The emphasis of this unit will be an exploration of different types of fictional narratives including realistic fiction, fantasy, personal narrative, and folktales. Students will develop a vocabulary for elements that most stories share in common, including characters, setting, plot, and a problem and solution. They will also learn to recognize the distinguishing features of each of these sub-genres. Students will focus on refining their skills at retelling and will become skilled at producing both oral and written summaries. For the final assessment of this unit, students will write a summary based on</p>	<ol style="list-style-type: none"> <li>1. Compose a draft that conveys major ideas and maintains focus on the topic by using preliminary plans.</li> <li>3. Suggest and implement reflection and revision (with assistance) on target elements by: <ul style="list-style-type: none"> <li>• a. Clarifying ideas, adding descriptive words and phrases</li> <li>• b. Sequencing events and ideas</li> </ul> </li> </ol> <p><b><u>Unit 2: Writing a Folktale (3 Weeks)</u></b></p> <p>In this unit, students will build on their growing knowledge of story structure and the folktale genre. Students will learn how to use a story map to plan their own fictional story in the style of a folktale. This unit will emphasize use of dialogue and narration to move the story along, as well as descriptive language to enhance the sense of place. Students will write a folktale that explains a fictional version of the creation of a specific landform in the local area.</p> <p><b>Strand II: CS II:</b>  Benchmark II-C:</p> <ol style="list-style-type: none"> <li>2. Compose a variety of fiction, nonfiction, poetry, and drama selections using self-selected topics and multimedia forms</li> </ol>
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	<p>quarter we will focus on:</p> <ul style="list-style-type: none"> <li>- correct capitalization at sentence beginnings</li> <li>- correct punctuation at sentence endings</li> <li>- correct capitalization of proper nouns</li> <li>- correct use of commas in a series</li> <li>- correct use of quotation marks around dialogue (although not correct paragraphing for dialogue)</li> <li>- correct use of indentation for paragraphs</li> </ul>	<p>a new text and present this to the class for critique and feedback. The final summaries will be modified to delete spoilers and will be displayed as book recommendations in the library.</p> <p>One key aspect of the unit will be an integrated connection to the third grade expedition, <i>Shaped by the Land</i>. Students will make text-to-world connections between folktales and personal narratives that relate to the geology of the Southwest. They will look at how the formation and importance of this landscape has been interpreted in stories from different cultures from this area, as in the text <i>Between Earth and Sky: Legends of Native American Sacred Places</i> by Joseph Bruchac.</p> <p><b>Standards for this unit:</b></p> <p><b>Strand 1: CS 1:</b> Benchmark 1-A:</p> <ul style="list-style-type: none"> <li><b>B.</b> Interact with text before, during and after reading, listening, or viewing to comprehend by: <ul style="list-style-type: none"> <li>• e. making connections, and</li> <li>• f. using story structure and text organization</li> </ul> </li> </ul> <p><b>Strand III: CS: III</b> Benchmark III-B</p> <ol style="list-style-type: none"> <li>1. Read and create a variety of texts, including: fiction, poetry and drama.</li> <li>2. Respond to fiction, non-fiction, poetry and drama using interpretive,</li> </ol>	<ol style="list-style-type: none"> <li>3. Suggest and implement reflection and revision (with assistance) on target elements by: <ul style="list-style-type: none"> <li>• a. clarifying ideas, adding descriptive words and phrases</li> <li>• b. Sequencing events and ideas</li> <li>• d. strengthening word choice</li> </ul> </li> </ol> <p><b><u>Writing Connection: <i>Shaped by the Landscape Learning Expedition</i></u></b></p> <p>Students will also be completing ample writing during learning expeditions as they process and respond to their exploration. Students will complete a variety of learning log entries and short responses through the first expedition. In addition, they will be writing at least two more developed pieces for the culminating project: a scientific description of the formation of one landform in the local area and a historical/ sociological investigation of the significance of that landform. Students will develop their ability to write within the conventions of different disciplines for this project. They will attend to both the form their writing takes (a scientific text complete with a diagram versus a descriptive report referencing a variety of primary and other types of sources) and the vocabulary they use within each discipline.</p> <p><b>Strand II: CS II:</b></p>
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		<p>critical and evaluative processes by:</p> <ul style="list-style-type: none"> <li>• a. considering the differences among genres</li> <li>• relating plots, setting and character to one’s own experiences and ideas</li> </ul>	<p>Benchmark II-C:</p> <ol style="list-style-type: none"> <li>2. Compose a variety of fiction, nonfiction, poetry, and drama selections using self-selected topics and multimedia forms</li> <li>3. Suggest and implement reflection and revision (with assistance) on target elements by: <ul style="list-style-type: none"> <li>• d. strengthening word choice</li> </ul> </li> <li>2. Combine information from multiple sources, using technology as a tool in writing reports and stories.</li> <li>3. Write stories and essays that show an awareness of an intended audience and purpose.</li> </ol>
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**Description of Quarter 2 Reading Units:**

***Unit 3: Exploring the World through Non-Fiction***

This unit will involve students in gaining familiarity with the structure of non-fiction texts and with purposes for non-fiction reading. They will learn to use a variety of reference materials as well as graphic and textural features specific to non-fiction, including the index, captions, diagrams, and glossaries. Students will apply their learning to do research for the culminating projects for the learning expeditions. They will also incorporate conventions of non-fiction texts as they complete written projects throughout the year.

***Unit 4: Realistic Fiction: Examining Characters and Making inferences***

In this unit, students will take a closer look at the genre of realistic fiction and read a variety of short stories and novels within this genre. They will examine characters and describe changes in character feelings as well as character traits based on evidence from the text. The emphasis of this unit will be on inferential thinking (using clues from the text to develop ideas not directly stated in the text). Students will engage in extensive writing in which they develop ideas about texts and support these ideas with appropriate, detailed evidence from the text. Student may even use citations denoted by quotation marks at times. They will also begin to explore the concept of theme in this unit. Finally, this unit will contain a deep emphasis on making text-to-self connections that enhance students’ understanding of the story and are explicitly related back to the text. One cross-curricular connection from this unit will be the application of inferential thinking to scientific reasoning and exploration during expeditions.

**Standards that will have a yearlong focus within our language arts curriculum:**

Some of the Language Arts standards will have a deep, permeating yearlong focus within our curriculum. All areas of the curriculum will emphasize the development of oral language abilities and vocabulary. A variety of student talk structures, including partner conversations and small group discussion, will be a cornerstone of learning across the content areas.

**Strand 1: CS 1:**

Benchmark 1-A:

4. Employ active listening skills.
5. Increase vocabulary through reading, listening, and interacting.

Benchmark I-D:

6. Read aloud with fluency, accuracy and comprehension when presented with a grade level passage of connected text.

**Strand II: CS II:**

Benchmark II-A:

1. Present information in a logical manner, with a clear main point.
2. Sustain conversation on a topic.
3. Answer open-ended questions.
4. Explain own learning.
5. Read aloud grade-level text with fluency and comprehension.



### Learning Expedition Overview

Expedition Title:	Discipline and Specific Topic:
Grade level:	Timeframe:
Date created or revised:	Authors & Email of main contact:
School name:	City/ State:

Learning Expedition Summary

Guiding Questions

Case Study/Studies	
1. Case study title	Big Ideas/ Broader Concepts
Specific content students will study	Key content standards that drive the case study

2. Case study title	Big Ideas/ Broader Concepts
Specific content students will study	Key content standards that drive the case study

Content and Skill Standards Assessed in the Learning Expedition	
Science and Technology	
Social Studies	
<b>Reading</b>	
<b>Writing</b>	
Math	
Visual and Performing Arts	
Health and Wellness	
Character	

Projects		
Project title	Project summary	Final product/ performance and audience


<b>Connections to the Community and the Larger World</b>	
Fieldwork	
Experts	
Service learning	
Expedition kick-off	
Expedition culmination	

## **4. Strategies and Methods**

### **Learning Expeditions**

Learning Expeditions are broken down into investigations, learning experiences, and ultimately, daily lesson plans. As mentioned, the student performance goals keep the curriculum focused while supporting learning targets are created and addressed on a daily basis. Supporting targets are also aligned with New Mexico's Standards, forming the basis for what is assessed.

Well designed and thoughtfully taught learning expeditions will give attention to issues of relevance to the community, academic skills, life skills, the body through physical education, exploration, and health, and the human spirit through awareness of one's self and connection to the world. Considering ways to empower students to take charge of their own destiny with a passion for life and learning and with compassion, integrity, and honor are satisfied through active pedagogy.

### **Active Pedagogy**

Examples of active pedagogy strategies may include: Building Background Knowledge Workshops, Science Talks, Socratic Seminars, Gallery Walks, Reading and Writing Workshops, Word Walls, Jigsaws, Written Conversations, Praise-Question-Suggest, Tableaus, and World Café. The professional development provided by EL staff models these strategies and teachers will have opportunities to practice these strategies, have model lessons taught by EL staff in the classrooms, and then opportunity of EL staff descriptive feedback and critique of their own teaching.

### **Learning is Public and Collaborative**

Student work is often shared for peer review/critique and then revised. Multiple drafts of work are expected prior to the final product. Students read their writing out loud, solicit comments and present project drafts for formal peer critiques. Students do public work just like in the real world. Having an authentic audience helps support quality work through higher stakes than solely the teacher as the intended audience.

### **Reduced Class Sizes and Oral Language Development**

The K-5 target class size of 24 in each class with either 2 teachers (K) or a teacher and an educational assistant (1-5) creates a 1:12 ratio. By investing in a reduced student to teacher ratio, Uplift Community School intends to maintain a learning environment where students have many opportunities throughout every school day to use academic language. Focusing on Oral Language Development practices and reduced class size results in more opportunities for each student to speak in the context of whole-class, group, or individual work.

### **Collaborative Teaching Strategies and Re-grouping Students**

Uplift Community School Teachers are expected to collaborate school-wide and consider themselves responsible for other students than their "home" classroom. Grade-level groups, in particular, will collaborate on curriculum and assessment regularly. Although planning and implementing learning expeditions is a challenging expectation for teachers, working together as a grade-level team will provide some of the support necessary to do it well.

Grades K & 1 Team: 3 Teachers, 1 educational assistant

Grades 2 & 3 Team: 2 Teachers, 2 educational assistants

Grades 4 & 5 Team: 2 Teachers, 2 educational assistants

Grades 6, 7, 8 Team: 3 Teachers

This close collaboration among teaching team members also allows for re-grouping of students into different class sizes to meet the needs of varying instructional situations. While class councils, “crew,” and many learning expedition activities may take place in the homeroom of 24, other activities may benefit from a larger group and a different mix of peers. Music is a subject, for example, in which most often students are engaged in a synchronized activity such as a drum circle or a choir. These activities may work well in a combined classroom of 48 4<sup>th</sup> and 5<sup>th</sup> graders. Other such examples include Physical Education and Standardized Testing.

Flexible grouping of students may also result in greater opportunities for meeting students’ needs through specific Response to Intervention approaches.

### **Training Teachers for Culturally Relevant Curriculum Development**

Curriculum development is largely in the hands of the teachers who design learning expeditions with advisement from parents, community members, and students. The following strategies, compiled by Elizabeth A. McCauley, will guide professional development for teachers so that they may design culturally relevant curriculum:

- Make a conscious effort to use materials and instructional methods that match the values and ideologies of the students. Acknowledge, confront, reveal, and remediate institutional racism, overt racism, dysfunctional institutions, internalized oppression, lateral oppression, passive-aggressive behavior, and self-destructive behaviors, all of which are the remnants of historical oppression in American Indian schools and communities.
- Become actively and critically engaged in developing a culturally relevant curriculum to claim local ownership of the curriculum and start educational reform from inside the classroom rather than being imposed upon from outside.
- Research shows that certain affective qualities of teachers who serve Native American students make the most effective teachers in the classroom: informal, caring, warm, give up authority, and have and show respect for the students.
- Teachers are taught generic traits of effective teaching methods in college education programs. Every teacher of Native American students should examine the ideologies they have internalized through their own school years, become self-reflective, and evaluate themselves as cultural workers

### **Differentiated Instruction in the Learning Expedition**

An advantage of project-based assessment is the ability for the teacher to direct students toward challenges at or just above the student’s ability. For example, if the learning expedition culminates with the production of a field guide to a local canyon, the teacher may direct an advanced student to choose an amoeba to research and describe. Amoebas move and change shape, they are difficult to keep relocating in a microscope, and are a challenge to draw. For a student with a learning disability, the teacher might direct the student to choose a plant that grows at the research site and also near the school so that the student may have sufficient time to study the plant, draw it, and create the field guide page. Both students will be contributing a page to the collective field guidebook. However, the teacher has the ability to direct the student choice to a challenge at or above the student’s developmental level.

### **Description of Professional Development Supporting Teachers**



As a professional development organization dedicated to the improvement of curriculum design, instruction, assessment, character and community, Expeditionary Learning provides a unique and powerful set of experiences and tools for teachers seeking to improve their craft.

Expeditionary Learning is a non-profit educational organization. Based on best practices and educational research EL provides professional development and resources to schools and supports the implementation of a specific model of education that focuses on the cognitive development (teaching content), the character development, and the physical/emotional development of students.

“It is not passive compliance but active, collaborative leadership among educators that improves schools.” (Johnson). Since it is the teacher that makes the curriculum come alive for students, since it is the interaction between the adults in the school and the students that really engages students actively in learning, the EL model focuses on and supports the capacity of teachers to become better learning experience providers. The role of EL is to assist teachers in taking the curriculum, the textbooks, and the state standards and finding ways to make it compelling for students to learn. It is the role of EL to build capacity within a school’s staff to actively engage students in a safe and supportive school environment.

Expeditionary Learning provides top quality on-site and national professional development. In fact, the National Staff Development Council (NSDC) rated EL as the only professional development provider for education meeting all 27 criteria for quality professional development. (What Works: Results-Based Staff Development)

A unique and specific blend of on-site and national professional development experiences have been found to be the most effective in supporting teachers in the implementation of the design. Schools with intense rates of implementation augment the significant on-site time from the school designers with attendance at the national conference, at institutes, and other EL PD offerings.

Beginning with an analysis of needs (determined by the EL implementation review, surveys of teachers, students, and parents; test scores, and a variety of other measures) our school’s leadership team will create an annual plan for improvement. This plan will be focused on our school-level SMART goals.

The focus of all investment in professional development will then be based on achieving the improvement goals. The amount of on-site professional development, participation in national professional development opportunities (institutes), attendance at national conferences (EL and others), visiting other successful schools (site seminars), and personal and curriculum growth opportunities, and identifying potential participants will assist in creating an accurate implementation plan.

## **B. EDUCATIONAL PROGRAM**

### **1. Length of School Day and School Year:**

The Uplift Community Schools will meet from 8-4 daily in all grades K-8 for a total of for a total of 7.5 instructional hours.

The Uplift Community School will meet for 150 full instructional days and 30 half instructional days for a total of 1245 instructional hours.

The longer school day of 7.5 instructional hours allows for an uninterrupted block of time in the mornings to focus on language arts and mathematics and an extend period of time in the afternoon to focus on interdisciplinary learning expeditions. The school calendar of 150 full instructional days and 30 half days allows for an early release day each Wednesday for professional development and time for instructional staff to plan and develop curriculum

### **2. Grade Levels, Class Size and Projected Enrollment:**

Uplift Community School will begin serving grades K-4, 24 students per grade level (120 students), with a phase-in of one grade level each year until grade 8 in August 2016 for a total of 216 students. The rationale for this phase-in plan is to start with a manageable school size, to provide continuity for students throughout their elementary and middle school years and to advance to the middle school grades a majority of students who will have experience in the rigorous school culture of Uplift Community School, thereby maintaining the school culture.

#### **Year 1: 120 students**

Gr. K = 24 students, 2 certified staff

Gr. 1-4 = 24 students each with 1 certified staff and one education assistant per grade level

#### **Year 2: 144**

Add Grade 5 = 24 students with 1 certified staff and one education assistant

#### **Year 3: 168**

Add Grade 6 = 24 students with 1 certified staff. This staff will be endorsed in LA & Social Studies or endorsed in Science and Math, or will work towards these endorsements during the year.

#### **Year 4: 192**

Add Grade 7 = 24 students with 1 certified staff. This staff will be endorsed in LA & Social Studies or endorsed in Science and Math. 6<sup>th</sup> and 7<sup>th</sup> will share the two endorsed staff.

#### **Year 5: 216**

Uplift Community School

Add Grade 8 = 24 students with 1 certified staff. This staff will be endorsed in LA & Social Studies or endorsed in Science and Math. All 6, 7, 8 students will rotate with the 3 certified staff.

### **3. Graduation Requirements (if applicable):**

Graduation requirements do not apply to Uplift Community School.

## **C. STUDENT PERFORMANCE EXPECTATIONS**

1. 100 % of students enrolled in Uplift Community School will demonstrate growth of at least one academic year in reading and math as measured by reading and math scores from the pre and post tests administered annually. Grades K-2 will be administered the DRA and grades 3-8 will be administered the NWEA MAP assessment. Each of these assessments calculates an "expected annual growth score" that will be the basis for the determination that students have met this annual goal.
2. 100% of students enrolled in Uplift Community School will score at least 80% on the learning expedition rubrics each of the four times the rubric is administered annually. The learning expedition rubrics evaluate students' understanding and mastery of NM state standards and benchmarks.

## **D. PLAN FOR EVALUATING STUDENT PERFORMANCE**

### **Formative assessments/Short cycle testing**

- All students will be assessed using the Developmental Reading Assessment (DRA) or Measures of Academic Progress (MAP) to obtain diagnostic information to guide instruction, interventions and grouping children with like needs at any one time.
- Six-Traits Writing Assessment will be used to show progress in creative and technical writing and grammar usage.
- The pre and post tests provided by the math curriculum materials will be administered when starting and finishing units to determine student progress in math.
- Teacher/student generated rubrics aligned with New Mexico Standards will be used to assess student learning through the expeditionary learning projects.

### **Summative Assessment**

- The school will use the NMSBA required of all schools as the summative assessment. Once test results are received the subsections of the tests will be reviewed to identify individual student needs. Teachers will review the scores of their previous class as a whole to identify where additional instructional focus is necessary. Teachers will also look at the scores of their current class to determine areas where the entire class needs extra emphasis.

Students are evaluated on the New Mexico Standards three times per years through the formative assessments and yearly through the summative assessment. All Uplift Community School

students will be expected to achieve one year growth on the NMSBA and the DRA/MAP assessment.

Uplift Community School will use the data obtained from these assessments in the three tier plan provided in The State of New Mexico Student Assistance Team Manual (New Mexico Public Education Department [NMPED], 2004).

### Tier I – General Screening and quality Instruction

Tier I provides primary intervention in the form of general screening and quality classroom instruction to all students. If assessment indicates that a student is struggling to learn, or working below grade level he/she will be provided classroom based interventions in addition to regular instruction. If the student does not respond positively to these interventions, he/she will be referred to Tier II.

### Tier II – Child Study Process

When the child has not responded to the Tier I interventions, he/she will be provided additional instructional time, individual or small group instruction, alternative learning materials and or different teaching methodologies. The Student Assistance Team (SAT) will plan the interventions appropriate for these students. Assessments will indicate whether these interventions are short-term or will continue for an entire school year. The ultimate goal is to assist the student in succeeding within the regular education setting with the standard curriculum. In cases where students do not respond positively to these interventions, they may move to Tier III.

### Tier III Multidisciplinary Evaluation

At Tier III, the assessments indicated above are showing that the interventions in Tier II are not yielding the gains the child needs. Students referred to Tier III require a multidisciplinary evaluation to determine their need for services. Tier III serves a very small percentage of students who demonstrate a need for an individualized program to accommodate their learning needs. Special education teachers, related service providers, and regular education teachers provide Tier III interventions that consist of specially designed instruction and supplementary aids and services. Tier III interventions are provided to a student through an IEP or 504 plan. The goal of Tier III is for the student to be successfully involved and progressing in the general education curriculum, and achieve the goals in his/her IEP. (NMPED Technical Assistance Manual: SAT, 2004)

### **Remediation**

Based on the data obtained from the entry level testing, necessary remediation will begin immediately. Remediation will be provided through groups or to individual students according to need. Remediation may include: tutoring, after school sessions, and enlisting family support. RTI sessions for reading students will occur during the regular reading time in the general education schedule. RTI sessions for math will be 30 minutes after lunch for four days a week. These sessions will be small groups determined by the math areas needed for improvement.

## Documentation and reporting of student data to students and parents

Parents or guardians will receive a copy of the performance standards for the grade in which their child is working to understand the expectations for the entire year.

The following document is an example of a progress report that will be created during the planning year and the first year of the school to show parents/guardians student growth each quarter. Teachers will indicate which performance standards have been mastered as well as which ones are the focus for the upcoming quarter. The teachers and students will present the report cards to parents/guardians with the student performance standards achievement document and portfolios of student projects as well as tests which illustrate the mastery or progress towards mastery.

## Uplift Community School Parent/Teacher/Students Conference Form

Student Name	Conference	Date 1
Family Name		Date 2
Teacher Name	Grade	

Student Information:

**Student Strengths:**

**Evaluation Reading Scores:**

Formative Assessment (circle one)	DAR	MAP	
Pre		Mid	Post

Scores:

**Evaluation of Six Traits Writing:**

Trait:	Beginning	Middle	End
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Ideas  
Organization  
Word Choice  
Sentence Fl  
Conventions  
Voice

**Evaluation of Math Scores:**

Pre	Mid	Post
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Scores:

**Evaluation of Progress on Learning Expeditions;**

Q1

Q2

Q3

Q4

Reading Goal:

Writing Goal:

Math Goal:

Expedition Goal:

Student Responsibility: Keep a positive attitude, ask questions, complete and return all work.

Family Responsibility: Help your child get to school on time, check all papers and information sent home. Sign and return any notices sent home for student.

Teacher Responsibility: Help the child to be a confident learner, build skills in math, reading, writing, and provide a safe and positive learning environment

Signatures:

Student

Family

Teacher

## **E. SPECIAL POPULATIONS**

Uplift Community School will enroll any student without regard to their needs or exceptionalities. The school will have in place policies and procedures to insure that all children with disabilities who are in need of special education or related services, are identified and evaluated in compliance with IDEA, Section 504 of the Rehabilitation Act of 1973, and Title II of the ADA of 1990 as applicable to LEAs. All students who require special educational services will receive a free appropriate education as identified for all individuals with disabilities by federal law. The IEP team when considering placement for a student in special education will select from a variety of educational settings that is most appropriate for the student

### **Referral and Identification Process for Special Educational Services**

The Uplift Community School's referral process for special education services consists of Response to Intervention (RTI) method. According to this method, there are three main intervention categories. These categories include research-based scientific interventions that are applied prior to special education.

All students not identified as special education students begin in Tier I Interventions. These interventions are universal and available to all students and are delivered within the classroom setting. Tier I interventions are those strategies that instructors are likely to put into place at the first sign that a student is struggling.

Tier II Interventions are for those students who continue to display academic difficulties. These interventions are individualized to the unique needs of the student. They are for students with significant skill gaps who have failed to respond to Tier I strategies or students who may be academically gifted. These RTI strategies could be delivered in small groups within the classroom or students could be pulled out individually to receive specific skill based instruction.

Tier III interventions are the most intensive academic supports available in school and are generally reserved for students with severe and chronic academic delays, severe behavioral problems, or those identified as gifted. They are mostly given only through special education. Students placed in Tier III have been identified through a Student Support Team (SST) process. Identified students will be serviced and monitored by a dual endorsed Special Education classroom teacher who will assure that all IEP accommodations are followed

### **SST Identification Steps:**

- Classroom teacher notices signs of academic difficulty.
- Teacher independently implements Tier I interventions into place and monitors/documents the student's performance.
- If the student continues to fail with Tier I interventions then the teacher refers him/her to the Student Support Team (SST) for Tier II interventions by completing a referral form.
- The SST team starts data collection and meets with the teacher to develop appropriate scientific, research-based interventions.
- Student progress is monitored by the SST team for a reasonable period of time (6-9 weeks) and interventions are changed as needed.



- If a student continues to experience difficulties in their general education with interventions, the SST may consider referring the student for an educational evaluation to determine if a disability is present.
- A parent may directly ask for an evaluation for special education services. A parent may begin this process of referral by indicating in writing to the teacher or administrator that he or she believes that the child is in need of special education services.
- During the initial referral process, notice of procedural safeguards will be given to the parent and receipt should be signed by the parent.
- If a parent makes a referral for an evaluation and the school decides an evaluation is not needed, the school must give prior written notice to the parent of its refusal to evaluate.

### **Evaluation Process:**

- SST team reviews data collected from teachers and parents and determines if educational testing is needed.
- School requests consent to conduct evaluation from parents.
- Within 60 calendar days from the date of parental consent, the necessary evaluation(s) will be completed.
- Upon completion of formal evaluation(s), an initial meeting to determine eligibility for special education and/or related services will be held. The SST committee will consist of the following members: a parent, the child, the regular education teacher, a dual endorsed special education teacher, LEA representative, diagnostician, and other individuals such as related service personnel as appropriate.
- With parental agreement to diagnosis and placement, an Individual Education Plan (IEP) will be written. If a parent refuses consent, no special education and related services will be provided.

### **Access to Ancillary Services:**

Based on the individual student's needs, the Uplift Community School will contract ancillary services. These services may include but are not limited to:

- Maintaining cumulative student health records
- Vision and Hearing screenings
- Counseling services as determined by the SST
- Occupational therapy, physical therapy and speech therapy as specified by student's IEP
- Full handicap accessibility in accordance with all Federal and State requirements.

### **ELL**

In accordance with the law, parents will complete the home language questions on the registrations forms when registering their child. Any student whose response is other than English, will be administered a language proficiency test developed by World-Class Instructional Design and Assessment (WIDA).

Students identified as English Language Learners (ELL) will be provided an educational program based on sound theory within the Expeditionary Learning framework. The goal of English as a Second Language programs shall be to enable limited English proficient students to become competent in the comprehension, speaking, reading, and composition of the English language through the integrated use of second language methods. The program will ensure that

students identified as limited English proficient (LEP) will learn English in a timely manner and provide them with equal access to the full range of the school's academic programs and content that other students have. The English as a second language program shall emphasize the mastery of English language skills, as well as mathematics, science, and social studies. The Expeditionary Learning model to be used at the Uplift Community School will assist in integrating all academics, therefore enabling LEP students to participate equitably in school. When developing a specialized language program for ELLs, the school will foster collaboration among the school administrator, teachers, educational assistants, the school counselor, and other staff who work with the school's ELL population.

The Uplift Community School through the Expeditionary Learning model will support ELL students by:

- following the instructional practices (protocols, workshops, mini-lessons, modeling, representing thinking, questioning and following student thinking, using exemplars and models, multiple drafts, revision, and critique, and reflecting and debriefing) outlined in the EL model.
- providing established best practices for ELL learners such as using clear, concrete language with supporting visuals and clues, teaching strategies combined with manipulatives, modeling of speech, speed and vocabulary, using challenging materials at appropriate reading levels, and additional support with language acquisition.
- using authentic and real life projects and assessments.

LEP students will be serviced and monitored by a TESOL endorsed classroom teacher who will use best practice strategies within the EL format.

In order for an ELL student to be exited from an instructional language program, he/she must attain proficient levels of English in speaking, reading, writing, and comprehension as determined by an annual WIDA language assessment. At this time, the student is then seen as able to fully participate in general education classes at the same level of achievement as his/her English speaking peers.

## VI. FINANCIAL PLAN

The Financial Plan should provide a description of how the school leadership intends to manage the school's finances, including assurances that public funds will be used appropriately and in compliance with all applicable federal and state requirements and laws. It should present a clear picture of the school's financial viability including the soundness of revenue projections; expenditure requirements; and how well the school's budget aligns with and supports implementation of the mission and educational plan.

### A. BUDGET

#### Revenue Projections and Proposed Operating Budget.

Uplift Community School's Phase-in plan requires 5 forms 910B-5, one for each of the five school years. As the school population increases with the addition of a grade level each year the funds generated from the SEG increase. These forms demonstrate projected revenue from SEG. Forms 910B5 providing revenue projections for each year of operation and the proposed 5-year Budget Plan are in Appendix D

#### Year 1: Enrollment 120 students K-4

##### Salaries and Benefits

###### Instruction

- Six FTE at an average salary of \$40,000, a mix of licensure Levels I, II, and III
- Stipends for TESOL/Dual Endorsement at \$1,000 each annually.
- Four Education Assistants at an average salary of \$15,000.
- Employer-paid benefits for instructional personnel calculated at 33% of salaries

###### Administration

- 1 FTE Director at a salary of \$75,000.
- 1 FTE Administrative Assistant at a salary of \$16,000.
- 1 FTE Custodian at a salary of approximately \$19,000.
- Employer-paid benefits for administrative personnel calculated at 33% of salaries or wages.

##### Purchased Services

###### Professional and Technical Services

- Professional Development: Expenses of \$1,500 per new teacher in order for orientation to the knowledge and skills required for implementing the Expeditionary Learning model. Ongoing professional development throughout the year will be provided through a contract with Expeditionary Learning and an on-site School Designer, the budget for this is to be paid from non-SEG revenue (Title I). An additional \$200 per teacher is assumed to include any professional development activities that go above and beyond provisions by Expeditionary Learning, which may include training in conflict resolution, cultural awareness training, classroom management, or first aid, as examples.
- Related Service Contracts: 5,000 budgeted to be used as needed, ancillary services of counseling and health services will be contracted.
- Auditing: \$15,000 is assumed to be the cost of annual financial audits.
- Legal: \$3,000 budgeted for legal services to be contracted as needed by the Governing Council or Director.

- Finance/Bookkeeping/Accounting: \$50,000 is the annual fee for fiscal management contract with such providers as the New Mexico Coalition of Charter Schools. This annual contract is considered a valuable investment in the long-term financial stability of the school, and will be purchased using federal Planning and Implementation Grant for Startup.
- Other Professional Services includes membership in the New Mexico Coalition of Charter Schools at \$100 + \$8/student per year.

### **Property Services**

Based on the assumption that facilities will be leased and maintenance of facilities will be included in the lease agreement.

- Maintenance and Repair: \$800 for repair of equipment and furniture.
- Rental – Land and Buildings: \$0 based on the assumption that Lease Assistance Funding, rather than SEG, will pay for rental of land and buildings.
- Rental – Equipment and vehicles: based on the assumption of \$500/month for such equipment as a photocopier.
- Electricity: based on the assumption of \$300/year per classroom or office space.
- Gas/Propane: based on the assumption of \$300/year per classroom/office space
- Communication Services: based on the assumption of \$300/month costs for wireless high-speed broadband Internet and telephone service.
- Water/Sewer: based on the assumption of \$300/year per classroom/office space.

### **Other Purchased Services**

- Employee Travel: \$500 based on the assumption that there will be occasions upon which employees are expected to travel to meet with students or their families, and attend chapter house or neighborhood meetings.
- Student Travel: based on the assumption of \$50/student per year. Student travel to local educational resources in the community is key characteristic of learning expeditions.
- Other Contracted Services: Contracting with local experts, artists, musicians, theater and dance groups, storytellers, outdoor and environmental education organizations. Budgeted amount varies depending on revenue. Bringing the community into our school is an important aspect of our Expeditionary Learning educational program.
- Property/Liability Insurance: New Mexico Public Schools Insurance Agency estimated annual cost of \$6200.
- Advertising and Marketing: Based on the assumption of need to advertise lottery enrollment in local papers and radio each year and to promote the achievements of students in the school. This budgeted amount varies each year.
- Board Travel and Training: based on the assumption of regular Governing Council training and travel at a rate of \$500/member/year. An additional \$1,000 per member is budgeted the first year in order to send all council members to the Expeditionary Learning National Conference.

### **Supplies**

- Other Textbooks: Some textbooks may be purchased in the startup year with federal start-up funding. The amount of \$10,000 here will supplement that resource.
- Software and Software Licenses: based on the assumption of \$10/student annually.
- General Supplies and Materials: based on the assumption of a minimum of \$10/student. Promoting quality student work is an important principle of Expeditionary Learning, requiring materials and supplies to create products that will be a contribution to the community.

- Library and Audio/Visual: based on the assumption of a minimum of \$10/student each year, with additional funds budgeted the first year to supply a school library.
- Food: based on the assumption of approximately \$10/student in support of school health policies.

### **Property**

- Supply Assets: Based on the assumption that federal start-up funding will provide initially for furniture and computer equipment needed in the ten classrooms, office, and computer lab/library. However, some funds are available to meet needs encountered late in the first year. Expeditionary learning places emphasis on use of technology in the project-based curriculum.

## **Year 2: Projected Enrollment 144 K-5**

### **Salaries and Benefits.**

#### Instruction

- Seven (7) FTE teachers as described above.
- Stipends for TESOL/Dual Endorsement at \$1,000 each annually.
- Five (5) Educational Assistants as described above.
- Employer-paid benefits for instructional personnel calculated at 33% of salaries.

Administration: as described above for Year 1. Any change in administrative salaries is to be approved by the Governing Council.

### **Purchased Services**

- Professional Development: Expenses of \$1,500 per new teacher in order for orientation to the knowledge and skills required for implementing the Expeditionary Learning model. Ongoing professional development throughout the year will be provided through a contract with Expeditionary Learning and an on-site School Designer, the budget for this is to be paid from non-SEG revenue (Title I). An additional \$600 per teacher is assumed to include any professional development activities that go above and beyond provisions by Expeditionary Learning, which may include training in conflict resolution, cultural awareness training, classroom management, or first aid, as examples.
- Other categories—assumptions as described for Year 1.

### **Supplies**

- Other Textbooks— The amount of \$10,000 here will supplement resourced need in math and reading. Math manipulatives and leveled reading material may be purchased when the budget allows for use in subsequent years.
- Other categories—assumptions as described for Year 1.

### **Property**

- Supply Assets: Funds are available for the additional classroom and to meet the needs that Expeditionary learning places emphasis on use of technology in the project-based curriculum

## **Year 3: Projected Enrollment 168 K-6**

### **Salaries and Benefits.**

#### Instruction

- Eight (8) FTE teachers as described above.
- Stipends for TESOL/Dual Endorsement at \$1,000 each annually.
- Five (5) Educational Assistants as described above.
- Employer-paid benefits for instructional personnel calculated at 33% of salaries.

Administration: as described above.

**Purchased Services:**

Professional Development: Expenses of \$1,500 per new teacher in order for orientation to the knowledge and skills required for implementing the Expeditionary Learning model. Ongoing professional development throughout the year will be provided through a contract with Expeditionary Learning and an on-site School Designer, the budget for this is to be paid from non-SEG revenue (Title I). An additional \$200 per teacher is assumed to include any professional development activities that go above and beyond provisions by Expeditionary Learning, which may include training in conflict resolution, cultural awareness training, classroom management, or first aid, as examples.

**Other Categories**

- Other categories—assumptions as described for Year 1.

**Property**

- Supply Assets: Funds are available for the 2 additional classrooms (being aware that the budget is tight in year 4) and to meet the needs that Expeditionary learning places emphasis on use of technology in the project-based curriculum

**Year 4: Projected Enrollment 192 K-7****Salaries and Benefits.****Instruction**

- Nine (9) FTE Teachers as described above.
- Stipends for TESOL/Dual Endorsement at \$1,000 each annually.
- Five (5) Educational Assistants as described above
- Employer-paid benefits for instructional personnel calculated at 33% of salaries.

Administration: as described above.

**Purchased Services:**

- Professional Development: Expenses of \$1,500 per new teacher in order for orientation to the knowledge and skills required for implementing the Expeditionary Learning model. Ongoing professional development throughout the year will be provided through a contract with Expeditionary Learning and an on-site School Designer, the budget for this is to be paid from non-SEG revenue (Title I).

**Other Categories**

Assumptions as described above.

**Year 5: Projected Enrollment 216 K-8****Salaries and Benefits.****Instruction**

- Ten (10) FTE teachers as described above
- Stipends for TESOL/Dual Endorsement at \$1,000 each annually.
- Five (5) Education Assistants as described above.
- Employer-paid benefits for instructional personnel calculated at 33% of salaries.

Administration: as described above.

**Property**

Supply Assets: Besides furnishing and equipping a new classroom this year, as described above, a large investment will be made in computer equipment to support the middle school in general and the grade-eight portfolio presentations

Fixed Assets: At this time the school intends to invest in fixed assets such as a new photo copier and new playground equipment.

## **Other Categories**

Assumptions as described above.

## **Other Revenue and Budget Factors in SEG Not Included Above**

### **Elementary Fine Arts \$28,000-\$33,000**

Visual art, music, dance, and theater will play an important role in our Expeditionary Learning curriculum when arts standards are integrated with standards in other core subjects of science, social studies, language arts and math in learning expeditions. Artistic products and performances are a key element of community involvement and assessment of student learning in our educational plan. The Fine Arts Education Act of 2003 provides operational funding for schools that submit satisfactory applications to the PED. We expect to receive up to \$200 per student in grades K-5 each year in order to implement a plan that meets the PED's expectations by contracting with local artists, providing additional professional development to our staff, providing equipment and supplies for the students' use, and/or hiring instructional personnel in the arts. Applications for elementary fine arts funding are due in April each year.

### **Physical Education \$28,000-\$33,000**

State law provides additional operational funding for elementary physical education programs. The school's Physical Education program will integrate with the Expeditionary Learning curriculum as well as wellness policies targeting the issue of diabetes in our community. We expect to receive an additional \$200 per student in grades K-5 each year in order to implement a Physical Education program.

## **Narrative Description of all Revenue Sources Other Than SEG**

### **Federal Planning and Implementation Grant for Startup, \$425,000**

The Governing Council, upon approval of this application in September, will apply for federal start-up funding. Based on data from previous years, it is expected that approximately \$425,000 will be disbursed for start-up needs. The funds will be used for contracted services in administration, professional development, legal services in securing a facilities lease, curriculum development and purchase, equipment and furniture, supplies, rental, marketing, fiscal services, playground equipment, and later in the planning year, the Director's salary. Some of the first school year's operating expenses will be offset by software, membership, equipment and supply purchases from startup funding. This list of expenses will be finalized at the time of application for federal start-up funds.

### **Title I Federal Funding, \$70,000 to \$126,000**

Based on the levels of Title I funding in other Gallup schools, Uplift Community School is expected to qualify for approximately \$500/student on average each year. This funding will be used to contract with Expeditionary Learning (\$50,000) to provide consultation on curriculum, professional development, and evaluation of the school's level of implementation. Title I funding may also be used to supplement needs for equipment, supplies, and student travel related to implementing the EL model. It is hoped that this source of revenue will also supply the school with salaries for instructional assistants (\$15,000 average assistant salary + \$5,000 benefits).

### **Pre-K Program Funding**

A strong emphasis on language development and a desire to work in developmentally appropriate ways to meet the needs of all students and families enrolled, point to the need for Pre-K programming at Uplift Community School. A proposal for a Pre-K program will be developed during the planning year.

### **Lease Assistance Grant from the Public School Capital Outlay Commission \$98,000-\$176,400**

Uplift Community School will qualify for approximately \$700/student each year for lease payments for classroom facilities.

### **Transportation and Food Service Programs**

Separate funding is available from the State of New Mexico to support Transportation programs and Food Service Programs. These opportunities will be critical to effectively serving lower income students of the area.

### **Advisory School Council Fundraisers \$10,000**

The Advisory School Council consists of parents of students enrolled in the school, students, teachers, other staff, the Director, and members of the community. They will be asked to provide feedback on student handbooks, budgetary information, etc. Annual fundraisers by the Advisory School Council will help to provide for the student's needs at the school. The goal is to raise a minimum of \$10,000 per year.

### **Navajo Coordinated School Health Grant \$40,000**

This grant provided through the Coordinated School Health Initiative is available for planning and implementing comprehensive school health plans, funding such expenses as salaries of personnel whose activities are related to student and staff wellness policies and promotion, and supplies needed to implement and support a model of student, employee and family health.

## **B. FISCAL MANAGEMENT**

Uplift Community School is aware of the level of responsibility which accompanies its handling of public funds, and therefore expects to contract with New Mexico Coalition of Charter Schools for fiscal management, Business Office services, and the services of a Business Manager.

### **Internal Control Structure**

Uplift Community School will have established and will work hard to maintain an adequate internal control structure that ensures compliance with all applicable laws and regulations. Our internal control structure consists of policies and procedures established to provide reasonable assurance that our fiscal management objectives will be achieved.

### **Control Environment**

Our control environment represents the collective effect of various factors on establishing, enhancing, and mitigating the effectiveness of specific internal controls. These factors include the following:

- Management's philosophy and operating style;



- Uplift Community School’s organizational structure;
- The functioning of the Governing Council;
- Management’s control methods for monitoring and following up on performance, including internal auditing;
- Personnel policies and practices; and,
- Various external influences that affect Uplift Community School’s operations and practices.

We have established our control environment so that it reflects the overall attitude, awareness, and actions of the Governing Council, management and others concerning the importance of control and its emphasis within Uplift Community School.

### **Accounting System**

Our accounting system consists of methods and records that have been established to identify, assemble, analyze, classify, record and report Uplift Community School’s transactions and to maintain accountability for the related assets and liabilities. We have focused on establishing methods and records to ensure the following:

- All valid transactions are identified and recorded;
- Transactions are recorded on a timely basis and described in sufficient detail to permit proper classification for financial reporting;
- The value of transactions is measured in a manner that permits the proper recording of their monetary value in the financial statements;
- Accuracy is maintained when determining the time period in which transactions occurred to ensure that transactions are recorded in the proper accounting period; and,
- Transactions and related disclosures are in the financial statements.

### **Control Procedures**

Our control procedures are those policies and procedures in addition to the control environment and accounting system that management has established to provide reasonable assurance that specific objectives will be achieved. We have devised, established and continuously strive to maintain a structure of internal accounting controls to provide that the following are in place:

- Segregation of responsibilities to ensure that the following duties are segregated: authorization to execute a transaction, recording the transaction, and custody of assets involved in the transaction;
- A system of authorization and recording procedures to ensure that all transactions are properly approved and recorded;
- Sound accounting practices are in place in the performance of duties and functions. This includes varied error-checking routines that are performed in connection with record keeping and comparing recorded amounts with existing assets and liabilities. Appropriate action shall be taken with respect to any differences;
- Employees handling significant amounts of cash must be adequately bonded. Access to assets is permitted only in accordance with management’s authorization;
- Receipts, checks or warrants, purchase requisitions, purchase orders, and vouchers shall be sequentially pre-numbered;
- Proper safeguards are in place to protect unused checks and other pre-numbered forms and cash that has not been deposited and other receipts;
- All transactions are recorded as necessary to permit preparation of the financial statements in conformity with Generally Accepted Accounting Principles (GAAP); and,

- Independent checks on performance and proper valuation of recorded amounts is being performed including clerical checks, reconciliations, comparison of assets with recorded accountability, computer-programmed controls, management review of reports that summarize the detail of account balances, and user review of computer generated reports.

### **Organizational Structure**

Uplift Community School has devised, established and will maintain an effective organizational structure to give appropriate consideration to ensure the following:

- A system of measurement of, and accountability for employee performances, is in place;
- A policy has been established in which the delegation of responsibility for employee actions is combined with sufficient authority to perform the assigned activities;
- Budgets and financial reports are created and maintained;
- There is adequate monitoring of activities at each level of the organizational structure; and,
- There is a system of checks and balances in place which separates incompatible activities to preclude absolute control by any individual or unit. This system also provides supervision by higher levels of management and for the monitoring of the overall school activities.

### **Budget**

#### **Budget Development**

1. The Business Manager is responsible for developing the proposed budget which covers all funds. In addition, a budget calendar must be developed to include a meeting for community input.
2. The prior year budget will be reviewed, and a budget to actual report will be developed. This report will be given to the Director and Governing Council to review.
3. The Business Manager will consult with the Director and Governing Council regarding the strategic direction of the budget for the upcoming year. The following will also be considered when developing the proposed budget:
  - Current and expected growth patterns;
  - The budget to actual report from the prior year; and,
  - The Educational Plan for Student Success.
4. Once the proposed budget has been developed, which is done on an Excel spreadsheet, it is forwarded to the Director for approval.
5. The proposed budget is then presented to the Governing Council for approval in an open meeting.
6. Once the budget has been approved by the Governing Council it is sent to be included in the overall Uplift Community School Budget.

#### **Budget Adjustments and Modifications**

1. Budget adjustments, which do not alter the total amount of the budget, include the following:
  - Intra-budget transfers, which are transfers between expenditure codes within the same function.
  - Inter-budget transfers, which are transfers between expenditure codes outside state functions.
2. Budget modifications, which do alter the total amount of the budget, include the following:

- Budget increases, which increase the funds available for the current year.
  - Budget decreases, which decrease the funds available for the current year.
3. There are no budget transfers allowed between funds.
  4. The Business Manager is responsible for preparing a proposal for all budget adjustments and budget modifications.
  5. The Business Manager will submit the proposed modified budget to the Director for approval.
  6. Once approved by the Director, the proposed modified budget is submitted to the Governing Council for approval at a scheduled meeting. If the changes are approved, the approval is noted in the meeting minutes. A budget adjustment request is then submitted either electronically or manually to the Public Education Department for approval.
  7. Once all approvals are in place, the Business Manager makes the approved changes to the budget in the Budget Module in the APTA financial system, and the Business Manager will review the modified/adjusted budget.

## **Purchasing**

### **Requisition Processing**

1. The requisitioning employee completes a pre-numbered purchase requisition form.
2. After all applicable information has been obtained, based on the procurement terms (see procurement process below), the requisitioning employee must sign and date the purchase requisition and forward it to the Director for approval.
3. The Director will review the purchase requisition and either approve, change or deny the purchase.
  - If the purchase requisition is approved, the Director will sign and date the purchase requisition to signify approval.
  - If the purchase requisition is denied, the reason will be documented on the purchase requisition, the Administrative Assistant will make a copy of the denial to be filed, and the form will be sent back to the requisitioning employee.
4. Once approved, the purchase requisition is forwarded to the school's Administrative Assistant to be entered into the Purchasing Module.
5. The selected vendor must be entered into the system as follows:
  - If the vendor is an existing vendor, their name is chosen from the vendor list.
  - If the vendor is a new vendor, at a minimum the vendor name, federal tax ID number and 1099 designation must be entered.
6. The original purchase requisition is then filed in the appropriate vendor file in chronological order.

### **Procurement Process**

1. Goods and services under \$5,000 may be obtained from the best obtainable source, considering cost, service, delivery, and prior use of similar goods. Although quotes are not required, they are strongly recommended in order to ensure the best obtainable price is achieved.
2. For purchases of tangible items between \$5,001 - \$10,000 and services between \$5,001 and \$30,000, the requisitioning employee must obtain three quotes. The quotes can be either verbal or written. All quotes must be documented on the purchase requisition, and the chosen vendor must be noted. If the lowest bidder is not utilized, the reason for the selection must be documented on the purchase requisition. Any supporting documents relating to the bids must be attached to the purchase requisition.

3. Competitive bids must be obtained on a request for proposal form and in accordance with New Mexico State Statute for purchases exceeding the following thresholds:
  - Bids are required for tangible items estimated to cost more than \$20,000.
  - Bids are required for professional services estimated to cost more than \$50,000.
4. In all instances where it is possible, the “Piggy Back” process will be utilized in accordance with New Mexico State Statute Section 13-1-129 NMSA.

### **Verification and Approval**

1. When the purchase requisition is entered into the system, a purchase order number is assigned to the purchase and a pre-numbered purchase order is automatically generated.
2. Once the purchase order is generated, the Business Manager will verify the accuracy of the cost account by reviewing the purchase order within the Purchasing Module. If any changes are mandated, they are entered into the system at this time.
3. The Business Manager is responsible for comparing the purchase order to the current budget to verify that the funds are available. During this verification process, the specific line within the budget that corresponds to the purchase must be considered rather than the total amount of the remaining budget.
  - If the funds are not available, the purchase requisition is sent back to the Director with an explanation as to why the purchase order will not be processed.
  - If funds are available, the Administrative Assistant documents the fund availability on the purchase order.
4. Prior to printing the purchase order, the Business Manager must review the vendor information for completeness and accuracy as follows:
  - If a different vendor is utilized because the vendor noted on the purchase order was not on the state approved vendor list, the new vendor and product information is entered.
  - If the original vendor is on the state approved vendor list, any omitted information is entered into the system and all existing information is checked for accuracy.
5. The Business Manager is the only employee within the Business Office that has the access to change or enter vendor information. The School’s Administrative Assistant is the only employee within the School that has access to change or enter vendor information.
6. After the purchase order is complete, two copies are printed, a vendor copy and a file copy.
7. The Business Manager must sign and date both copies of the purchase order.
8. The vendor copy is forwarded to the selected vendor to initiate the purchase and the file copy is filed in the Open Purchase Order file until an invoice is received.

### **Exemptions from the Procurement Code**

1. There are several items that are exempt from the Procurement Code which are listed in Section 13-1-98, NMSA, 1978 Compilation. Those related to school districts include:
  - Procurement of items of tangible personal property or services from another state agency or a local public body;
  - Purchases of publicly provided or publicly regulated gas, electricity, water, sewer and refuse collection services;
  - Travel or shipping by common carrier or by private conveyance or to meals and lodging;

- Contracts for public school transportation services are covered under regulation;
  - Minor purchases consisting of magazine subscriptions, conference registration and fees and other similar purchase where prepayments are required;
  - The issuance, sale and delivery of public securities pursuant to the applicable authorizing statute with the exception of bond attorneys and general financial consultants;
  - Contracts for retirement and other benefits pursuant to Sections 22-11-47 through 22-11-52, NMSA, 1978 Compilation; and,
  - Entertainers.
2. When a purchase is exempt from the procurement code, or is a recurring purchase or a reimbursement payment, the normal purchasing process does not need to be followed. In any of these instances, the following procedures are followed:
    - For recurring payments, no purchase requisition, purchase order or check request is required. The Business Manager will enter the payment into the Accounts Payable Module during the bi-weekly invoice processing.
    - For reimbursements or other items that are exempt from the procurement code, the requester must complete a check request form and submit the supporting documentation to the Business Office.
  3. The Business Manager will review the voucher summary report that is created during the invoice processing cycle and authorize that all payments that are not supported by a purchase order or do not follow the normal procurement process are mandated and appear to be reasonable expenses.

### **Accounts Payable Processing**

#### **Receiving**

1. A designated individual at the school is responsible for receiving all purchased goods and performing the following steps when goods are received:
  - Inspect the goods for visible damage in the presence of the carrier. Damaged goods should not be accepted.
  - The employee will inspect all goods received and compare the items and quantities to the open purchase order in the Purchasing Module. The items and quantities received will be entered into the Receiving Module and a receiving report will be generated in the system.
  - If discrepancies are discovered, they are documented and investigated.
2. Once the receiving report is completed, it is printed and acts as the proof of delivery form.
3. The goods are delivered to the requisitioning employee. The recipient is required to sign and date the receiving report to authorize that all goods on the receiving report were received.
4. The packing slip and the signed receiving report are forwarded to the school's Administrative Assistant to be matched and maintained with the corresponding purchase requisition.

#### **Invoice Processing**

1. All invoices are forwarded to the Business Office. When an invoice is received, the Business Manger will pull the corresponding purchase order from the open purchase order file, print the receiving report and attach both documents to the invoice.

2. Accounts Payable will be processed on a bi-weekly basis.
3. The Administrative Assistant is responsible for comparing the invoice, purchase order and receiving report. The following should be performed:
  - Verify that all items shown on the invoice were received. Compare the items and quantities shown on the invoice to the items and quantities shown shipped or delivered on the receiving reports.
  - Verify the calculations and totals on the invoice, such as quantities received multiplied by unit price.
  - Verify that the total on the invoice is no more than 10% and \$100 over the amount approved on the Purchase Order. If the total exceeds the limit, a new Purchase Order must be created and the verification and approval process must be redone with the new total.
4. The Business Manager will enter all invoices to be paid into the Accounts Payable Module.
5. A voucher summary report is printed and forwarded to the Business Manager along with all invoices and supporting documents.
6. The Business Manager will compare each payment on the voucher summary report to the supporting documentation and initial and date the report to authorize that the checks may be printed.
7. The check stock is maintained in a locked cabinet that must remain locked at all times. The Business Manager will take the number of checks needed according to the voucher summary report from the cabinet and lock it back immediately.
8. The Business Manager will then print all checks listed on the voucher summary report and print the check register.
9. The checks and supporting documents are forwarded to the authorized individuals to be signed.
10. The Business Manager will match all checks to the check register to ensure that all printed checks were received.
11. The signed checks are given to the Business Manager to be mailed to the appropriate vendor.
12. The payment vouchers and supporting documents are given back to the Administrative Assistant to be stamped "Paid" and filed in the appropriate vendor files by date.
13. The Administrative Assistant will file the check register by date.

### **Travel**

1. Employees traveling for work-related purposes must document their proposed itinerary on a pre-numbered travel requisition form. The form must include, at a minimum, the following information:
  - Employee name;
  - Dates of travel;
  - Reason for the travel;
  - Estimated cost and description of related expenses including hotel, flight, rental car, mileage, per diem, registration fees, etc.; and,
  - An indication as to whether advanced funds or reimbursement will be utilized.
2. Per diem and mileage rates will be applied according to the state rates established by the Department of Finance and Administration.
3. Once the requisition is completed, the requisitioning employee must sign and date the form.

4. The travel requisition form must be submitted to the Director for review and approval.
  - If the travel requisition is denied, the Director will document the reason for the denial.
  - If the travel requisition is approved, the Director will sign and date the requisition.
5. If the Director is the employee that is submitting a travel requisition, it must be reviewed and approved by the Governing Council Chair.
6. The travel requisition form has triplicate copies that will be distributed as follows: original form to the requisitioning employee; duplicate copy to the School's Administrative Assistant; and the triplicate copy to the Business Office.
7. Funds may be advanced, if requested, up to 80% of the total estimated travel cost. If advance funds are required, the payment will be processed by the Business Manager during the next accounts payable cycle and in accordance with the accounts payable policies and procedures.
8. The requisitioning employee is responsible for making all travel arrangements.
9. All receipts must be maintained.
10. When the employee returns from travel, they have 7 days to complete a pre-numbered travel voucher. The corresponding receipts or other supporting documentation must be attached to substantiate each expense. The travel voucher must include, at a minimum, the following information:
  - Employee name;
  - Corresponding travel requisition number;
  - A description of each expense incurred;
  - The actual cost of each expense; and,
  - For advances, reconciliation must be performed between the expense totals on the travel requisition and those on the travel voucher with a total of how much is owed to the employee or due from the employee.
11. The completed travel voucher must be signed and dated by the employee and forwarded to the Director for approval. If the Director is the employee that is submitting the travel voucher, it must be reviewed and approved by the Business Manager.
12. If the Travel Voucher total exceeds the approved total on the Travel Requisition form by greater than 10% and by more than \$100, the Business Manager will forward the Travel Voucher to the Governing Council for approval.
13. The travel voucher form has triplicate copies that will be distributed as follows: original form to the requisitioning employee; duplicate copy to the School's Administrative Assistant; and the triplicate copy to the Business Manager.
14. The School's Administrative Assistant will match travel voucher to the corresponding travel requisition, and file the forms in the appropriate personnel file.
15. The Business Office will match all travel vouchers received to their corresponding travel requisitions and determine if payment is due.
16. Any payment due to the employee will be processed by the Administrative Assistant during the next accounts payable cycle and in accordance with the accounts payable policies and procedures.

### **Bank Reconciliations**

1. Bank reconciliation is performed on a monthly basis by the Business Manager.

2. The check register and GL detail are exported from the accounting system into Excel. The bank reconciliation is performed in an Excel spreadsheet using a preexisting template.
3. The bank statement is viewed online.
4. The reconciliation must be completed by the 15th of each month.
5. All differences between Bank and Book will be posted in the month reconciled.
6. The Business Manager will review and approve the bank reconciliation after completion.

## **Payroll**

### **Employee Master File Maintenance**

1. The Director and the Governing Council are responsible for monitoring the hiring and termination of employees, authorizing salaries, initiating employment contracts and maintaining staffing levels approved in the annual budget.
2. Each time employment information changes whether it is due to a newly hired employee, a termination, a pay rate change, or a change in payroll deductions including tax information, insurance coverage or other benefit deductions, a personnel action form must be completed by the Director.
3. The employee and the Director must sign and date the personnel action form.
4. Certified employees that are paid based on a salary must have an employment contract in place. Each time their salary changes, the Director must update the employee's contract, and both the Director and the employee must sign and date the updated contract.
5. A copy of all personnel action forms and employee contracts are maintained in the corresponding personnel file and a copy is forwarded to the Business Office prior to the effective payroll.
6. The personnel action forms and updated employee contracts are used to update the employee master files in the Payroll Module. This is done prior to payroll processing and is performed by the Business Manager.
7. Access to personnel files and master files is restricted to authorized staff. All payroll information is kept in a locked filing cabinet and the computerized employee master files are password-protected.

### **Direct Deposit**

1. If an employee elects to use direct deposit, a Direct Deposit Form must be completed and signed. A voided check must be attached to the Direct Deposit Form.
2. All direct deposit documentation will be sent to the Business Office prior to the effective payroll.
3. The Accounting Specialist or the Business Manager will enter all direct deposit information into the Employee Management Module.
4. The direct deposit documents are filed in a locked filing cabinet.

### **Time Sheets**

1. All hourly employees are responsible for preparing and signing a time sheet at the end of each period. The biweekly time sheet is used to record hours worked, paid time off and holidays.
2. Before taking time off, employees complete and submit a leave request form to the Director for approval. The Director's leave requests must be sent to the Governing



Council Chair for approval. If an employee misses work and a leave request was not completed prior to the absence, an absentee report is created. Leave that is taken without sufficient leave balances are docked from the employee's pay.

3. Employees are responsible for turning in their time sheets to the Director by the Monday following the final day of the pay period.
4. The Director will review and approve all time sheets and attach any corresponding leave requests or absentee reports.
5. All payroll documents including approved time sheets with supporting leave requests and absentee reports, any personnel action forms and updated or new employee contracts are forwarded to the Business Office for payroll processing no later than the Tuesday following the final day of the pay period.
6. The Business Office receives all payroll documents.
7. The Administrative Assistant performs the following tasks prior to entering information into the Payroll Module:
  - Review each time sheet and leave request to ensure that the employee and the Director signed it;
  - Recalculate the time sheets; and,
  - Ensure that all documented leave is supported by an authorized leave request or an absentee report.
8. The Administrative Assistant will enter all payroll information including hours worked, paid time off and any unpaid time off into the Payroll Module.
9. After all payroll information has been entered, a voucher summary report is printed.
10. The voucher summary report and all supporting documentation is forwarded to the Business Manager to be reviewed. The Business Manager's review ensures reasonableness and accuracy of the current pay period calculation, and ensures that checks or direct deposits are not accidentally issued to terminated employees.
11. The Business Manager will sign and date the Voucher Summary Report to authorize that the checks may be printed. All documents are forwarded back to the Administrative Assistant.
12. If errors are discovered, the Administrative Assistant corrects them before printing the checks.
13. The check stock is maintained in a locked cabinet that must remain locked at all times. The Business Manager will take the number of checks needed according to the voucher summary report from the cabinet and lock it back immediately.
14. The Business Manager will then print all checks and direct deposit slips listed on the voucher summary report. A check register will be printed.
15. The checks, direct deposit slips, supporting documents and the check register are forwarded to the Business Manager to be signed.
16. The Business Manager will match all checks to the check register to ensure that all printed checks were received.
17. The Business Manager will sign and date the check register to signify that the checks were received and signed.
18. The Business Manager delivers the signed payroll checks to the Director for distribution to the employees.
19. Any unclaimed payroll checks are maintained by the Director in a locked drawer.

### **Quarterly Payroll Reports**

1. Quarterly tax reports are prepared by the Business Manager or the Business Manager and consist of the following
  - Form 941 – Employer’s Quarterly Federal Tax Return
  - State Taxation and Revenue Report
  - Worker’s Compensation Report
  - SUTA
  - FUTA

### **Monthly Payroll Reports**

1. Monthly tax reports are prepared by Business Manager or the Business Manager and consist of the following:
  - Education Retirement Board Report
  - NMPSIA
  - AIG – Valic 403B
  - EFPTS
  - NMCHCA
2. For the payments listed above, the Administrative Assistant will obtain the vendor invoice and forward the invoice and supporting documentation to the Business Manager.
3. The Business Manager will review the invoice and approve it. Once the invoice has been approved for payment, it will be forwarded back to the Administrative Assistant to initiate payment during the next regularly scheduled Accounts Payable Cycle.

### **Capital Assets**

#### **Capitalization**

1. A capital asset shall be defined as any single item of non-expendable personal property, the cost of which exceeds \$5,000 and has a useful life of more than one year.
2. The cost basis of assets includes all charges relating to the purchase of the asset, including the purchase price, freight charges, and installation, if applicable.
3. The cost of buildings includes all expenditures related directly to acquisition or construction. These costs include materials, labor, overhead incurred during construction, and fees, such as attorney’s fees, architect’s fees, and building permits.
4. Expenditures incurred in connection with maintaining an existing facility in good working order are expensed as a repair if the cost is less than \$5,000.

#### **Acquisitions**

1. The purchase of capital assets is initiated using the same policies and procedures as all other purchases. (See Purchasing Policies and Procedures)
2. The Business Office is responsible for ensuring that all purchases that qualify as capital assets are properly coded during the purchase order approval stage of the purchasing process.

#### **Dispositions**

1. All dispositions will be processed according to the salvage process and in accordance with New Mexico State Statutes.

- a. After the salvage process has been completed, the Business Office deletes the item from the asset records and records the disposition.
2. Missing or stolen assets are reported in writing to the Director as soon as possible.
  - A police report must be filed for all stolen assets.
  - If unrecovered, the Business Office is notified in writing and the asset is then removed from the asset records.

### **Asset Records**

1. The Business Office maintains a detailed listing of capital assets; including the description, the date acquired, vendor, cost basis, useful life, depreciation information and salvage value.
2. The Business Office updates the general fixed assets account group when new assets are acquired, disposed of, lost or stolen.
3. Annually, the Business Office furnishes the Director with a list of capital assets, including any quarter year acquisitions or disposals.
  - The Director will be responsible for designating an employee to perform a physical inventory and identify capital assets that are not on the listing.
  - Any discrepancies noted by the school are reported to the Business Office as soon as possible. The Business Office will be responsible for reconciling any differences.
4. At year-end, the Business Manager will reconcile the ledger account to the schools inventory listing and make any necessary adjustments.
5. The Business Office is responsible for keeping adequate records on the depreciation lives; depreciation method used and accumulated depreciation for each fixed asset.

### **Cash Controls**

#### **Cash Receipts**

1. The School's Administrative Assistant and the Business Manager both maintain a book of pre-numbered cash receipts.
2. Coin, currencies, checks, money orders, and other forms of monies are received in the following ways:
  - Received at the school by the teacher and the amount received from each source must be entered on a cash receipts listing. The teacher is responsible for turning in all monies received and the corresponding cash receipts listing on a daily basis to the School's Administrative Assistant. The School's Administrative Assistant is required to count all monies received in the presence of the teacher and issue to the teacher a pre-numbered cash receipt at that time.
  - Received directly by the School's Administrative Assistant, who issues a pre-numbered cash receipt.
  - Received directly by the Business Manager, who issues a pre-numbered cash receipt.
3. The cash receipts book has triplicate copies that shall be distributed as follows: original to payer; duplicate attached to the schools copy of the corresponding deposit slip; triplicate remains in the receipt book.
4. If a receipt is voided, all copies shall be marked "VOID" and retained in the receipt book.
5. All monies received must be kept in a locked drawer until they are deposited.
6. All checks shall be endorsed with the "For Deposit Only" stamp when received.

## **Depositing**

1. All monies must be deposited into a checking account within 24 hours of being received.
2. The School's Administrative Assistant and the Business Manager are responsible for completing pre-numbered deposit slips.
3. The deposit slip and all monies being deposited are forwarded to the appropriate authority for approval.
  - a. The Director approves all deposits at the school.
  - b. The Business Manager approves all deposits at the Business Office.
4. Deposits are made by the School's Administrative Assistant and the Business Manager
5. A copy of the deposit slip, the deposit verification slip and all related cash receipts are filed together by date.

## **Revenue Ledger**

1. All revenue entries are entered into the revenue ledger by the Business Manager.
2. Cash receipts issued from the Business Office will be entered by referring to the triplicate copy of the cash receipt.
3. The School's Administrative Assistant is responsible for forwarding a copy of all cash receipts to the Business Manager on a weekly basis.

## **Student Activity Funds**

### **Deposits**

1. Student Activity Funds are used to account for those resources owned, operated and managed by the student body, under guidance of a staff member or another adult, for educational, recreational or cultural purposes. These funds are used for a wide range of activities that can include the school yearbook, student athletics or various student clubs.
2. The club sponsor or treasurer must bring all monies collected to the School's Administrative Assistant for deposit by the end of the day of collection.
3. Sponsors who fail to deliver funds to the School's Administrative Assistant shall be reported to the Business Manager.
4. The School's Administrative Assistant will issue a pre-numbered cash receipt for the monies received, and record the receipt on a Student Activity Funds Log. The depositor is required to sign the log to signify the noted amount of deposited funds is accurate.
5. The Student Activity Funds Log must be forwarded to the Business Office at the end of the day in which the collection occurs, so that it can be entered into the system.
6. The School's Administrative Assistant will follow the normal deposit procedures when depositing Student Activity Funds.
7. Sponsors are responsible for developing budgets upon deposit of funds.
8. The Business Manager will reconcile the cash account on a monthly basis.

### **Disbursements**

1. Sponsors are responsible for submitting a check request and all other appropriate documents to withdraw funds from their account.
2. Sponsors are responsible for obtaining the Director's signature on the check request, approving the withdrawal of funds, prior to submitting the request to the Business Office.

3. Funds that are withdrawn shall be given to the adult sponsor; under no circumstances shall funds be released to individual students. Funds will be disbursed in the form of a check. Absolutely no cash will be given as a form of withdrawal.
4. All excess change that results from a withdrawal shall be re-deposited in accordance with the deposit procedures above.
5. When a prepayment must be made or a reimbursement is being claimed, the appropriate receipts or other supporting documents must be attached to substantiate the amount of the withdrawal. Again, funds that are not accounted for with receipts must be re-deposited.
6. All goods purchased through Student Activities must follow the school's procurement policies.
7. Any balances remaining of the account name shall be carried over into the new fiscal year under the same account.

**Journal Entries**

1. All journal entries are made at the Business Office.
2. The Administrative Assistant prepares a journal entry by completing a pre-numbered journal entry form.
3. The Administrative Assistant must sign and date the journal entry form.
4. The form, along with supporting documentation that justifies the journal entry, is sent to the Business Manager. They are the only employees who have access in the system to enter journal entries.
5. The Business Manager must review the journal entry, ensure the accuracy of the account coding, enter the journal entry into the system and sign and date the journal entry form to signify that the entry was approved and posted.
6. Unused journal entry forms remain in the custody of the Business Manager.
7. Journal entry forms that have been processed are forwarded back to the Business Manager to be filed in the journal entry file in chronological order along with any supporting documentation.
8. If a journal entry form is voided, it is stamped "VOID" and filed in the journal entry file.

**General Ledger**

1. The general ledger is a record containing the accounts needed to reflect the financial position and the results of operations of the school. Double-entry bookkeeping is utilized, and therefore the debits and credits in the general ledger equal.
2. The school utilizes the New Mexico Public Education Department (PED) Uniform Chart of Accounts (UCOA). The structure of the UCOA is as follows:

<b>Component</b>	<b>Structure</b>
Fund	X/XXXX
Function	X/XXX
Object	X/XXXX
Program	XXXX
Location	XXX/XXX
Job Class	XXXX

3. The Business Manager is responsible for maintaining the following journals:
  - Cash Disbursement Journal
  - Cash Receipts Journal
  - Payroll Journal
  - All other accounting data is summarized in the General Journal at month end
4. These journals are all used to update the General Ledger (summary of accounts) at month-end.

### **Financial Reporting**

1. All reports are generated by Business Manager.
2. The following reports are generated:
  - Expenditure report
  - Cash report
  - Annual End of the year report
3. All reports are reviewed and approved by the Business Manager prior to being submitted.
4. All monthly and quarterly reports must be submitted to the state by the 15th day of the end of the reporting period.
5. The Annual Summary of the Year Report must be submitted by July 31st (last day of the month following year-end).

### **Record Retention**

1. The school retains records in an orderly fashion, for time periods that comply with the State Records Retention Act.
2. Filing at the school is performed and maintained by the School's Administrative Assistant.
3. Filing at the Business Office is performed and maintained by the Business Manager.
4. All archived files, manual and CD-ROM, will be stored by category and date in filing boxes, and maintained in a locked room. The filing boxes will be clearly labeled indicating what files are in the box.
5. The School's Administrative Assistant and the Business Manager are responsible for maintaining adequate and up-to-date records of where all records are maintained.
6. Three to six months after each year end (June 30), the Business Manager has all files exceeding their required holding period destroyed in accordance with the State Records Retention Act.
7. The Business Manager maintains a permanent list of all destroyed records for future reference.

### **Account Reconciliations**

#### **Asset Account Reconciliations**

1. Asset accounts, which may include investments, inventory, prepaid expenses, travel advances, employee accounts receivable, etc., will be reconciled by the Business Manager on a monthly basis. This reconciliation is necessary to make adjustments to the asset account to correct previous posting errors, to correct detail in the asset account as a result of the discovery of subsequent information about an account and other miscellaneous adjustments needed to bring the asset account in agreement with the supporting detail.

2. These asset accounts should first be reconciled to any supporting subsidiary ledgers. The subsidiary ledgers maintain the detail by individual transaction. All debt and credit entries to the individual subsidiary ledgers should be agreed to the total postings in the General Ledger for that period.
3. Once the subsidiary ledgers have been reviewed, corrected and are deemed accurate, adjusting journal entries may be necessary to bring the General Ledger in agreement with the totals from the subsidiary ledgers. The information necessary to complete these adjusting journal entries will be uncovered during step #2 above.
4. The Administrative Assistant will maintain a separate file folder for each asset account, including monthly reconciliations.

**Liability Account Reconciliations**

1. Liability Accounts which may include payroll taxes payable, capital lease liability, accounts payable, etc., should be reconciled by the Business Manager on a monthly basis. This reconciliation is necessary to make adjustments to the asset account to correct previous posting errors, to correct detail in the asset account as a result of the discovery of subsequent information about an account and other miscellaneous adjustments needed to bring the liability account in agreement with the supporting detail.
2. These liability accounts should first be reconciled to any supporting subsidiary ledgers. The subsidiary ledgers maintain the detail by individual transaction. All debt and credit entries to the individual subsidiary ledgers should be agreed to the total postings in the General Ledger for that period.
3. Once the subsidiary ledgers have been reviewed, corrected and are deemed accurate, adjusting journal entries may be necessary to bring the General Ledger in agreement with the totals from the subsidiary ledgers. The information necessary to complete these adjusting journal entries will be uncovered during step #2 above.
4. The Administrative Assistant will maintain a separate file folder for each asset account, including monthly reconciliations.

**Fund Balance Account Reconciliations**

1. Fund balance amounts represent the earnings that a fund has accumulated as a result of collecting more revenue than has been spent.
2. A schedule should be developed at the end of the fiscal year summarizing the activity that gave rise to the fund balance. This schedule should identify the revenues and expenditures for each program and the related fund balance created. A budget should then be established to plan for the subsequent disbursement of a positive fund balance or for the collection of revenues to eliminate a negative fund balance.
3. The following format can be used for reconciliation of the fund balance account:
 

Beginning Fund Balance	(XXXXXXXX)
Current Year Revenues	(XXXXXXXX)
Current Year Expenditures	XXXXXXXX
Ending Fund Balance	(XXXXXXXX)

### **Expenditure Account Reconciliations**

1. Expenditures should be reconciled by the Business Manager on a monthly basis. This reconciliation is used to verify the amounts listed as expended in each account line item. It should reveal any data entry posting errors.
2. The Business Manager will print a detailed general ledger for the month, listing all expenditure line items.
3. All supporting documentation (expense voucher packages) will be examined to determine if each item was correctly posted to the appropriate general ledger account.
4. A schedule will be developed for each account, listing the date, vendor, description and amount for each general ledger posting.
5. The total listing of the schedule listing should agree to the general ledger balance.

### **Financial and Compliance Audit**

Uplift Community School shall have a yearly audit performed on its financial records as required by Section 12-6-3, NMSA 1978. The school has budgeted for, and will contract with an outside auditor to provide this service through the PED. Audit fees shall be charged to the appropriate funds as required by law.

### **Finance Committee and Audit Committee**

Pursuant to CS/HB 227 & 251, at least two members of the Governing Council will be appointed by the Governing Council Chair to serve on the Finance Committee to assist the Council in carrying out its budget and finance duties by:

- making recommendations to the local school board in the following areas: financial planning, including reviews of the school's revenue and expenditure projections; review of financial statements and periodic monitoring of revenues and expenses; annual budget preparation and oversight; and procurement; and
- serving as an external monitoring committee on budget and other financial matters.

At least two members of the Governing Council will be appointed by the Chair to serve on the Audit Committee along with one volunteer member who is a parent of an enrolled student and one volunteer member who has experience in accounting and financial matters, and the Director and the Business Manager serving as ex-officio members.

The Audit Committee will:

- Evaluate the request for proposals for annual financial and audit services;
- Recommend the selection of the financial auditor;
- Attend the entrance and exit conference for annual and special audits;
- Meet with external financial auditors at least monthly after audit field work begins until the conclusion of the audit;
- Be accessible to the external financial auditors as requested to facilitate communication with the board and the superintendent;
- Track and report progress on the status of the most recent audit findings and advise the local school board on policy changes needed to address audit findings;
- Provide other advice and assistance as requested by the local school board; and



- Be subject to the same requirements regarding the confidentiality of audit information as those imposed upon the local school board by the Audit Act and rules of the State Auditor.

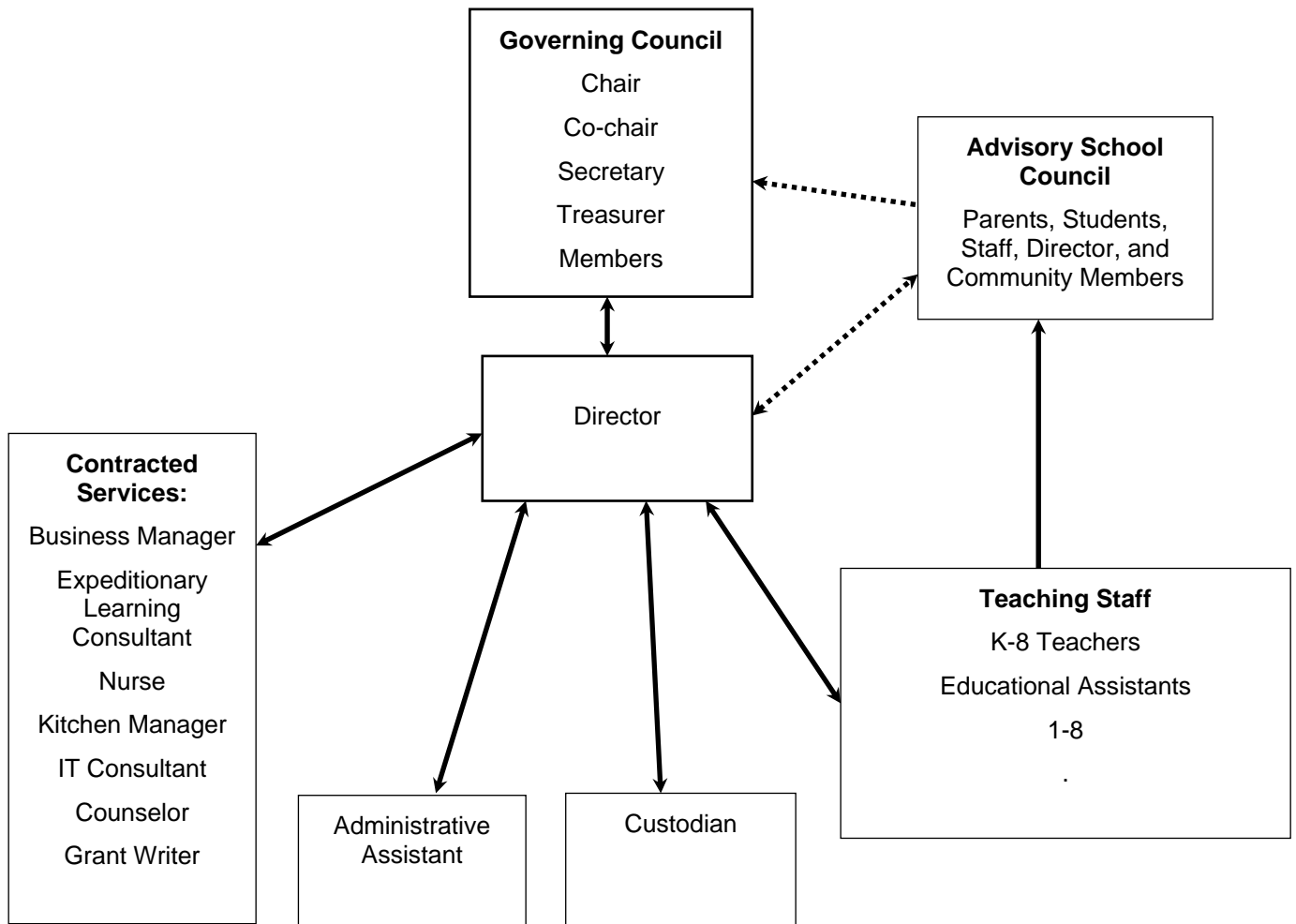
The completed audit report shall be presented to the Council for examination and discussion. The audit report shall be a public record, and copies shall be filed with the state and other appropriate authorities.

## VII. GOVERNANCE/MANAGEMENT PLAN

The Governance/Management Plan should provide an understanding of how the school will be governed and managed. It should present a clear picture of the school's governance and management practices, what roles and responsibilities various groups and individuals will have, and how those groups will relate to one another. The Plan should outline how decisions are made at the school site and provide a convincing picture of the school leadership's capacity to successfully operate the school. In addition, the governing body of a charter school is, first and foremost, publicly accountable for student academic performance and the expenditure of public funds.

### A. GOVERNANCE /MANAGEMENT STRUCTURE

Organizational Chart



## **Narrative Description of Organizational Chart**

### **Governing Council**

Responsibility to the New Mexico Public Education Commission for all educational, fiscal, and legal obligations of the school lies with the Governing Council, the Governing Body of the school, which also functions as the Board of Finance.

### **Director**

The Governing Council relies upon the Director, who is its chief operating officer, to execute school policy and fulfill council expectations for operation of the school, including making all employment decisions. The Director participates in the school's fiscal procedures as described in Section VI, manages contracts for various services to the school, including fiscal services of the contracted Business Manager. The Director supervises all instructional and non-instructional staff, including both salaried and hourly employees, overseeing performance of staff duties. The Director reports to the Governing Council.

### **Advisory School Council**

The Advisory School Council consists of parents of students enrolled in the school, students, teachers, other staff, the Director, and members of the community. The Director will collaborate with the ASC, supporting it in order to organize and function as an effective advisory group. The ASC shall advise the Director and the Governing Council from perspectives of students, families, and staff. The ASC may advise the Director, report to the Governing Council on the effectiveness of decisions made by the Director, and/or respond to decisions made by the Governing council.

### **Contracted Business Manager**

The Uplift school will contract business management services through an organization like the Coalition of Charter Schools. The Director is responsible for managing all contracts, and is responsible for collaboration with the contracted Business Manager of NMCCS to assure the licensed professionals can provide consistent, accurate, and complete financial information on a timely basis.

### **Expeditionary Learning School Consultant**

The School Designer is an employee of the non-profit Expeditionary Learning under contract to Uplift Community School. The School Designer is provided as part of the contract with EL. As the school's primary connection to EL, the School Designer is provided to the school for professional development and program evaluation. The scope of work of the School Designer's contract is typically decided by the Director in the spring of each year based on the needs of the school.

## **Other Contracted Services**

The Director makes decisions regarding such contracted services as Information Technology Consultant, Health Assistant, Counseling Services, Kitchen Management, and Grant Writing.

## **Administrative Assistant**

Administrative Assistant will carry out procedures, communication, and information management tasks to assist the Director and other staff.

- Answering phones
- Entering data using desktop computers
- Scheduling
- Receiving visitors in front office
- Organizing files
- Communicating clearly in person, as well as by mail, telephone, email, and fax
- Photocopying
- Record keeping, including finances, student information, inventory, etc.

## **Custodian**

The Custodian will be present during the school day in order to help maintain a clean and orderly learning environment. This position presupposes the cooperation of staff, students, and families in the work of the custodian as a matter of school culture. Regular custodial duties such as collecting trash, recycling, picking up litter, vacuuming, washing surfaces, and dusting, may be shared by students and staff of the school. Working with cleaning chemicals, bio-hazards, working on ladders to replace bulbs, and other duties that might present safety issues to students, however, will remain the primary work of the custodian.

## **Teaching Staff K-8**

The Director hires, trains, supervises, and evaluates teachers and instructional assistants. The Director will organize teams of teachers to help implement school goals and to whom to delegate administrative tasks such as maintaining communication throughout the school, acquiring data relevant to school goals, problem-solving and organizing related to parent and community involvement, curriculum design, special education needs, school health plans, and test coordinating.

## **B. DESCRIPTION OF THE GOVERNING BODY**

Uplift Community School will be governed pursuant to the bylaws adopted by its Governing Council. These bylaws will be finalized at the first meeting of the Governing Council, and will follow the guidelines of this charter school application.

The Governing Council shall operate by policies and procedures that are in compliance with all applicable statutes and regulations, including the Open Meetings Act.

The Governing Council shall request to be designated a Board of Finance by the State of New Mexico. Its major roles and responsibilities will include involvement in the fiscal procedures as

described in Section VI Fiscal Policy and Procedures, approving all major educational and operational policies, and selecting and evaluating the Director.

The Governing Council will operate in a manner that honors the contributions of all members of the learning community, inspiring students and families to participate in the life of the school, staff to reach their professional potential, and community members and organizations to partner with the school.

#### **Responsibilities of the Governing Council:**

- Apply to become a Board of Finance
- Hire, evaluate and supervise the Director
- Develop major educational and operational policies
- Fulfill budget and audit requirements of the PEC
- Renew and amend the charter
- Accept gifts on behalf of the school

#### **Policies and Procedures by which the Governing Council Will Operate**

The Governing Council will operate in accordance with applicable federal and state law and the proposed school's charter with the NMPED. Ongoing operations of the Governing Council will be guided by parliamentary procedures as codified by Robert's Rules of Order Newly Revised (10th Edition), and informed by a thorough understanding of the needs of public charter school governance.

**Open Meetings Act:** New Mexico's Open Meeting Act governs all Uplift Community School governing Council meetings. All Council meetings will comply with requirements for location, notice, agenda, and minutes. Meetings will be open to the public and conducted using public meeting guidelines. Executive sessions must follow procedural requirements and qualify under the seven authorized reasons for holding an executive session.

#### **A Plan for Openness**

In order to promote transparency and accountability, the Governing Council will:

- Make available in advance the notices and agendas of public meetings at a publicly accessible area in the proposed charter school's office and/or the Director's Office so as to be available for review during regular business hours; and on the proposed charter school's website not less than six calendar days prior to the public meeting, unless a waiver is granted by the chair in the case of an emergency.
- Make available the minutes from public meetings on a timely basis at a publicly accessible area in the Administrative Office so as to be available for review during regular business hours, and on the proposed charter school's website.

#### **Council Powers and Duties**

The role of the Governing Council is to provide policy, financial and legal direction, oversight, and to insure the long-term financial viability of Uplift Community School of Expeditionary Learning. Financial responsibilities of the Council will include approval and monitoring of the annual budget, the stewardship of the school's assets, the fostering of fund-raising through

solicitation of donations and grants, and long-term planning regarding school facilities. The Council will enter into and revoke all contractual relationships, including the hiring and firing of the school Director. In addition, the Council will conduct a yearly performance review of the Director based on the Director's job description, the results from the school-wide Expeditionary Learning Implementation Review, the competencies for principals as articulated in New Mexico state law, and performance in relation to stated goals and objectives. The Council will adopt a policies and procedures manual and will continue to add to and refine this manual with input from the administration and faculty. The Council will give final approval to any proposed changes and additions to the school charter, by-laws, and policies and procedures. The Council is responsible for the school's compliance with this charter. The Council is composed of selected representatives from the parent community and the greater community to ensure that all school stakeholders will be represented. The school Director will participate as a non-voting member.

## **Criteria and Selection Process for the School's Director**

### **Criteria**

The Director will have the following qualifications:

- Administrative Licensure, M.A./M.S. or higher;
- Demonstrated knowledge of and commitment to the educational principles of Expeditionary Learning Schools, and Uplift Community School's mission and vision;
- Demonstrated commitment to effective multicultural education;
- Demonstrated ability to plan, schedule and coordinate the efforts of multiple groups and numerous projects simultaneously;
- Demonstrated ability to hire, supervise, delegate responsibility to, evaluate, apply due process, and dismiss, personnel;
- Demonstrated ability to facilitate groups of people from diverse backgrounds and interests;
- Demonstrated educational leadership in the areas of curriculum, instruction, student conduct, student development, and professional growth;
- Experience with developing budgets and implementing financial policy and procedures in an organizational setting;
- Demonstrated effectiveness and persistence as a problem-solver.

### **Process**

The Governing Council will select the Director by majority vote, having recruited applicants for the position of Director through a public process, including advertising in local and national newspapers and professional printed media, referral, and through appropriate electronic recruitment mechanisms.

In accordance with the Charter Schools Act and as a state-authorized charter, the Director is not an employee of the Gallup McKinley County Schools, but shall be hired directly by Uplift Community School. All Uplift Community School employees will be hired in accordance with all state and federal employment rules and regulations and in compliance with the School Personnel Act.

The Governing Council will form a search committee in October, 2010, to publicize the job opening, and will identify, screen, and interview candidates. The job opening will be publicized during the months of November and December on the school website, through the NM Charter Coalition, and through paid advertising in local and national newspapers and other media recruitment avenues. Applicants with experience in Expeditionary Learning Schools will be a primary focus of recruitment. The search committee will make its final recommendation to the Governing Council in January. Upon hire, the Director will be paid for deliverables through the federal charter schools grant in February and March and then will begin salaried employment in April.

### **Budgeting and Operation of School, including Finance Committee and Audit Committee**

The Director and the contracted Business Manager will work closely together to prepare a proposed annual budget and present it to the Council. The Business Manager will work with the Council Finance Committee to review the budget. The Finance Committee will then present the budget to the full council for its approval at a public meeting in which the public is allowed to comment on the school budget. An annual audit, as required by law, will take place with the full cooperation of the Audit Committee, the Director, and the Business Manager.

### **Decision-making**

Uplift Community School will follow a traditional decision-making model. At a meeting of the Governing Council, each member shall have one vote. A majority vote of a quorum of the Governing Council carries any issue. A quorum is defined as a simple majority of the Council. A quorum of Council members will not discuss school business whether in person, on the phone or electronically unless open meeting law procedures have been followed. The school will be structured so that there is not a quorum of Governing Council on any school councils or committees that discuss school business. A Council member may not participate on school councils or committees when doing so would create a quorum.

### **Description of the Responsibilities and Obligations of the Governing Council**

The purpose of the Governing Council is to govern the operations of Uplift Community School. The Governing Council holds collective authority over the school. Individual council members do not hold authority over the school. The Governing Council will work to fulfill the mission of Uplift Community School. In accordance with the Charter Schools Act, NMSA 1978, Sections 22-8B-1 et seq., the Governing Council will govern and manage Uplift Community School in a semi-autonomous manner subject to all other applicable federal and state laws and regulations. The Governing Council shall report to the Uplift Community School authorizer, the New Mexico Public Education Commission. The Council shall be composed of not less than five members. Members of the Council are accountable to the PEC.

Officer positions of the Council will include Chair, Co-Chair, Secretary and Treasurer. The Governing Council will operate in accordance with applicable federal and state law and the proposed school's charter.

New members of the Council shall be selected by the Council. The Governing Council Chair shall be appointed by the members of the Governing Council. Election of Governing Council officers, term limits, and term rotation will conform to the proposed school's by-laws, which are

being developed with the goal of ensuring continuity of leadership. The by-laws will also provide a method for the expansion of the Governing Council if that proves desirable.

All meetings of the Governing Council and its committees will be public meetings, except where required by law to be closed. We anticipate that the Governing Council will conduct regular business at least once a month or at the call of the Chair, the Director, or majority of Governing Council members. The Governing Council also will meet periodically to implement an outcomes-based evaluation and training program. This program will be designed to develop board capacity in order to allow the Governing Council to more effectively advance the proposed school's mission and vision.

### **Members of the Governing Council and their Qualifications**

#### **Anne Lundberg, Chair**

Anne serves as Assistant Professor of Early Childhood Multicultural Education at the University of New Mexico—Gallup. She has a PhD in Teacher Education and Curriculum Studies from the University of Massachusetts, Amherst, Child and Family Studies & Early Childhood Education and Development Program. Her areas of specialization are in teacher education, young adult learning and development, pre-service and in-service supervision, social justice education, culturally responsive pedagogy, intercultural training, multicultural education, and family-school-community partnerships. She brings to the council experience on various school governing boards, and coordinator experience at small, progressive schools including Fayerweather Street School, a progressive independent school of 250 students K-8<sup>th</sup> grade in Cambridge, MA, Bank Street School for Children, a moderate-sized college laboratory school in New York, NY, Friends Seminary, a large Quaker Pre-K-12<sup>th</sup> grade school in New York, NY, and the Charles River School, a small independent school with 300 students in Pre-K-8<sup>th</sup> grade in Dover, MA. Her teaching, leadership, and governing experience are linked with a philosophy of education synchronized with Expeditionary Learning Design Principles.

#### **Jennifer Brown, Co-Chair**

Jennifer has taught in New Mexico for 13 years. She has an undergraduate degree in education and a Masters of Library and Information Science. She is a National Board Certified Teacher in Library Media. She has worked in both private and public education. She has served on many school and district level committees. She is currently the librarian at Church Rock Academy. As a parent of a multi racial child, Jennifer is committed to education that is fair and equitable for all students while celebrating their rich cultural heritage.

#### **Kimberly Ross-Toledo, Treasurer**

Eleven years ago Kimberly founded the Coalition for Healthy and Resilient Youth (CHRY), a non-profit youth leadership development organization in Gallup that works with teens to examine the effects and social determinants of health on adolescent substance use. She is CHRY's Executive Director. She is Navajo, is passionate about working with native youth, and has worked extensively as a trainer to promote cultural sensitivity and prevent institutional racism. The strengths she brings to the Council include budgeting and fiscal management, human resources, administration and community development.



### **Linda Kaye, Secretary**

Linda brings to the Council her experience of eight years of teaching elementary music, 30 years of teaching high school music and drama, and career-long advocacy of integrating the arts with other core subjects in curriculum and maintaining the highest standards for quality of student work. She has also served as 504 Committee member and coordinator of ADD parent support, which demonstrates her concern for students with a broad range of special needs and her understanding of processes in place for identifying and responding to those needs. She has demonstrated in her work as an educator leadership, professionalism, and collaboration. Linda has spent her entire teaching career teaching Navajo students on or near the Navajo Reservation.

### **Ann Doucette, Member**

Ann Doucette after graduating from Lesley University with a major in elementary education and a minor in special education, moved to Gallup to embrace teaching in a culturally diverse environment. Since moving to Gallup she has taught special education at both the high school and elementary level in the public schools and the Bureau of Indian Education. Ann developed a work study and career development program for special education students at the University of New Mexico – Gallup Branch within the Area Vocational School. While at UNM-G she received her MA in Adult Training and Development with an emphasis in Career Development. Her passion has remained with teaching students with disabilities where she has developed curriculums that have an emphasis on using multi-sensory approaches to build academic needs while also designing a curriculum that specifically meets the creative and cultural demands of her students. Ann has served on a variety of non-profit boards in Gallup over the years and took time off from teaching to work with both the developmentally disabled and elderly being served through the Medicaid Waiver as a Case Manager. Ann has also taught a variety of classes at Dine College in Window Rock, AZ which provided a unique insight into teaching both an age and educationally diverse group. Ann remains committed to her philosophy that all individuals are capable of reaching their fullest potential when given the opportunity to learn in a safe and productive environment where their unique talents and abilities can be developed and fostered.

### **Governing Body Recruitment**

New Governing Council members will be invited to apply by standing Council members, or past members in good standing, as vacancies on the Council occur through expansion, through term limits or through resignations. New member applicants will also be recruited from the community, including parents, the greater educational community and the geographical community where the school is located. The openings on the Council will be advertised on the school's website, in the school newsletter, as well as in the local newspaper and on local radio stations.

Council applicants will be interviewed by a committee of Council members and selected by the Council based upon their experience relevant to the current needs of the school's Governing Council. The Council Chair shall be chosen from among members of the Governing Council. Persons who are the spouse, parent, in-law, or offspring of a current school staff member are not eligible to serve on the Governing Council while the relative holds a position at the school. Election of Governing Council officers, term limits, and term rotation will conform to the proposed school's by-laws.

The Council Members shall normally hold office for a term of four years, except for initial Council Members whose terms will be for 2 years, 3 years or 4 years in order to stagger the terms. Initial council members first terms will be selected by the chair so that two serve a four-year term, two serve a three-year term, and one serves a two-year term. A Council Member who chooses subsequent four-year term must go through the same application process as a new applicant. New Council Members will be selected according to the following criteria:

- Possess qualifications valuable to the Council, such as being a parent or guardian of an enrolled student, having appropriate legal, business, or school administration experience, or experience as a community organizer or selected government official.
- Committed to Uplift Community School and the educational mission of the school
- Commit to serving a full term.
- Be inclined to work collaboratively and seek consensus in making decisions as a group.

### **Orientation Process for New Members and Ongoing Training**

The Chair is responsible for orienting new members to the Council. An annual budget line item is designated to cover the cost of Governing Council training. Members will be expected to satisfy SB148 requirements for a minimum of 5 hours of training annually and be familiar with the by-laws, policy manual, and charter of Uplift Community School. The Council will be trained in the Open Meetings Act, charter law, roles and responsibilities, ethics, conflicts of interest and financial procedures. Membership in the New Mexico Charter School Coalition will give the Council access to regular professional development opportunities. The Council will also participate in opportunities to experience model Expeditionary Learning schools in order to acquire a shared vision for Uplift Community School.

The Governing Council will, at the beginning of each year, identify a set of goals for training linked to the goals of the Educational Plan of the school's charter, and create an annual calendar of board study and training sessions designed to attain those goals.

### **Role of Staff, Families, and Community Involvement in the Governance**

#### **Meeting schedule and opportunities for staff, family and community involvement**

Meetings of the Governing Council will be held monthly with special meetings called as needed. Meetings will be advertised in the school office and through the school newsletter and website, and will be conducted in accordance with the Open Meetings Act. Each meeting will dedicate a portion to advisement by the ASC and to public comment, addressing the Governing Council. One of the most important goals of Uplift Community School is to involve parents, students, various staff and other community members as partners in the learning process.

#### **Parent Involvement**

The school shall communicate expectations for involvement of all students' families. It is the intent of the school to implement opportunities for parent involvement that are linked with student learning and child development. Such parent involvement activities shall include such activities as:

- Participation in events designed to familiarize them with Expeditionary Learning,

- Participation in the Advisory School Council,
- Attendance at exhibits of culminating work by students involved in learning expeditions,
- Involvement during the school day as volunteers reading to children or preparing for student activities, or as guests sharing relevant expertise including expertise in media and technology,
- Participation in learning outside of the classroom,
- Contribution to student assessment or recognition of student achievement, or
- Attendance at student-led conferences, portfolio presentations, or performances.

A Parent Handbook will be developed during the planning year to communicate expectations of parents of Uplift Community School students, and suggest examples of ways for parents to be involved.

### **Advisory School Council**

Pursuant to 2009 NMSA 1978 22-5-16, the Advisory School Council will assist the Director with school-based decision-making and function to involve parents in their children's education. The ASC's membership will be elected and its membership shall reflect an equitable balance between school employees and parents and community members. At least one community member shall represent the business community, if such person is available. The school Director may serve as chairman. The school Director shall be an active member of the school council. The council will receive training in how to be an effective advisory board. Decisions will be made through consensus.

The school council shall:

1. Work with the school Director and give advice, consistent with state and school rules and policies, on policies relating to instructional issues and curricula and on the public school's proposed and actual budgets;
2. Develop creative ways to involve parents in the schools;
3. Where appropriate, coordinate with any existing work force development boards or vocational education advisory councils to connect students and school academic programs to business resources and opportunities; and
4. Serve as the champion for students in building community support for schools and encouraging greater community participation in the public schools.

By supporting a dynamic and active Advisory School Council, Uplift Community School intends to raise the level of student achievement, meet the requirements of New Mexico laws, involve families in the life of the school, build community support for the school, and lighten the work load of the Director. Parent Involvement in learning at home is one of the most important ways parents can help support children's development during the school years, and as such, meaningful family involvement in student learning is a primary goal of the school.

The Governing Council shall support the presence of a dedicated space for families in the school, such as a Family Room or Resource Center, and consider other spaces and services the school building may provide for families in order to center the school in the lives of families.

The Governing Council shall maintain expectations for the Director to continuously promote, communicate with, and cooperate with the Advisory School Council and encourage all staff to

do so. The Advisory School Council shall provide information on meetings and decisions to the Governing Council.

The Director shall promote a strong Advisory School Council that represents the variety of families and students of the school. In order to do so, recruitment for the ASC will begin upon enrollment, at which time such information shall be gathered from families that will allow the Director and staff to inventory the capacity of family members and students for leadership or other roles in the ASC, select best methods of communication with parents, and consider other appropriate opportunities for parent involvement in the school. The Director may delegate any responsibilities relating to the ASC and Parent and Community Involvement in general to the appointed Team Leader.

### **Staff**

Staff may advise the Governing Council through participation on the ASC or in cooperation with the Director. The Director will express expectations to staff to participate in the ASC and welcome parent involvement.

### **Students**

Students participating in the ASC will be trained by staff to develop leadership skills and to formulate questions and conduct surveys relating to students' perspectives of the school, presenting the results of their inquiry to the Governing Council as a report of the ASC. Students' voices will be taken seriously. All members of the ASC have equal rights and responsibilities. By contributing to the life of the school, students otherwise marginalized by poverty, race and/or language will practice active participation in education.

### **Community Organizations**

Community organizations with a desire to work with the school may present to the Governing Council directly by requesting to be included on the agenda, or during the public comment period, or may work with the Governing Council indirectly through the ASC or the Director, in order to suggest partnerships or programming for the school.

### **Learning that is Relevant to the Community**

It is the desire of Uplift Community School to center student learning on issues that are relevant to the students, families, and the community, addressing the needs and issues perceived by all stakeholders. For this reason, curriculum will be dynamic, and its design will depend on ongoing needs assessment conducted by the Director, teachers, and the ASC. Learning expeditions will often involve current issues, addressing the needs of students and families in the community, and linking to the work of community organizations if deemed appropriate in regards to state and federal law and New Mexico Standards.

## **C. PARTNERSHIPS**

No partnerships shall be essential to the existence of the charter school.

## **D. SCHOOL ORGANIZATIONAL STRUCTURE**

Job Descriptions: Some are contingent upon other operational funds, including special education, Physical Education, Fine Arts. Others are contracted services: nurse, counselor.

### **Director**

The Governing Council will delegate operational responsibilities to the Director.

The Director will report directly to the Council. The Director will supervise the school staff and will direct day-to-day educational program and school operations. The Director will also follow through on Council policy directives and budgetary decisions regarding the operations of the school. The Director will make recommendations to the Council regarding personnel and policy issues and is responsible for state reporting and compliance and assure progress is made toward the charter educational goals and objectives.

The Director will work with the contracted Business Manager as the financial, accounting and procurement officer for the school, responsible for maintaining accurate and complete records, conforming to appropriate laws and regulations, carrying out Council policies and directives, and assuring proper internal controls.

Rather than employing an individual as Business Manager, Uplift will contract with an organization such as the New Mexico Coalition of Charter Schools to provide services of a licensed School Business Manager that are consistent with fiscal policy described in Section VI. It is in the best interest of Uplift Community School to contract for these services in order to assure continuity in business management as may be provided by a team of business managers and a business office serving several small schools. The duties and obligations of this contracted service are listed as a guide for contract expectations rather than employment:

### **Business Manager**

Under the management of the Director, the contracted Business Manager will:

- Manage procurements and keep account of expenditures and allocations;
- Maintain accurate financial and business records in conformance with best fiscal practices;
- Coordinate all documentation for personnel matters, including the hiring of staff, leaves, payroll, certifications, etc;
- Under the direction of the Governing Council Treasurer, draft fiscal and accountability reports and prepare for annual audits;
- Assist the Governing Council and Director in developing school budgets;
- Oversee health and safety requirements;

- Recommend to the Governing Council appropriate business-related school policies and procedures;
- Serve as liaison between Uplift Community School and selected state agencies and unions;
- Support the annual independent audit,
- Implement Governing Council policies requiring internal fiscal controls; and
- Implement Governing Council policies prohibiting conflicts of interests.

Requirements: New Mexico Licensed School Business Manager

Accountability: The Business Manager is accountable to the Director.

## **Job Descriptions**

### **Director**

The Governing Council will hire a Director. The Director will be responsible for:

- Insuring the success of all school programs and operations;
- Overseeing daily operations of the school in the context of the school's mission and goals within its Expeditionary Learning model;
- Hiring all staff;
- Providing leadership and clear guidance to the school community centered on the principles of Expeditionary Learning;
- Fostering and ensuring a professional and collegial climate;
- Acting as liaison between the school and the NMPED as the chief operating officer of the Governing Council;
- Facilitating the development of a long-range strategic plan;
- Creating a support staff evaluation and accountability program;
- Overseeing the professional development of school staff and Governing Council;
- Evaluating all staff;
- Supervising guidance and discipline;
- Overseeing student recruitment and admissions procedures; and
- Leading the search and interview process for hiring staff.

Requirements: New Mexico Educational Administration license

Accountability: The Director is accountable to the Council.

### **Administrative Assistant**

Administrative Assistant will carry out procedures, communication, and information management tasks to assist the Director and other staff.

- Answering phones
- Entering data using desktop computers

- Scheduling
- Receiving visitors in front office
- Organizing files
- Communicating clearly in person, as well as by mail, telephone, email, and fax
- Photocopying
- Record keeping, including finances, student information, inventory, etc.

Requirements: Organizational skills, computer skills, interpersonal skills, High School Diploma or GED, Associates degree and 1-2 years experience preferred.

Accountability: The Administrative Assistant is accountable to the Director

### **Custodian**

The Custodian will be present during the school day in order to help maintain a clean and orderly learning environment. This position presupposes the cooperation of staff, students, and families in the work of the custodian as a matter of school culture. Regular custodial duties such as collecting trash, recycling, picking up litter, vacuuming, washing surfaces, and dusting, may be shared by students and staff of the school. Working with cleaning chemicals, bio-hazards, working on ladders to replace bulbs, and other duties that might present safety issues to students, however, will remain the primary work of the custodian.

### **Additional Staff**

The Director will recommend any additional staff required to ensure that Uplift Community School operates effectively, including school counselor, Special Education teacher, facilities maintenance, school nurse, kitchen manager, information technology coordinator, etc.

### **Teachers K-8**

One teacher will be hired with dual endorsements in special education and classroom teacher to help identify needs. Additionally, Teachers with TESOL endorsement will be recruited.

Teachers will:

- Work toward school goals guided by Expeditionary Learning principles;
- Participate in ongoing collaboration and professional development in order to plan and implement learning expeditions as the core of the curriculum;
- Invite, welcome, and sustain parent and community involvement;
- Assess student progress on a regular basis, developing and using methods appropriate to Expeditionary Learning including performance-based assessment tools, rubrics for evaluating culminating products of learning expeditions;
- Communicate regularly with parents;
- Adapt new teaching strategies in order to respond to formative assessment data;
- Work collaboratively in grade-level team teachers to deliver instruction in flexible groupings, sharing students and school hours with other teachers as needed;
- Work collaboratively in a Goal Team as assigned by the Director to address the need for continuous improvement toward school goals;

- Teach in a combined classroom as assigned by the Director; and
- Write progress reports and hold parent/teacher/student conferences as directed.

Requirements: Appropriate New Mexico Teaching License and endorsements,

Accountability: Teachers are accountable to the Director

### **Instructional Assistant**

Instructional Assistants are not part of the application budget, but would be a valuable part of the staff and program, and may be hired with non-SEG revenue, such as Title I.

An instructional assistant will support students and teachers, with specific assignments given by the Director or appointed teacher. Assistants will be trained to help maintain high standards for student conduct and to preserve a school culture that reflects the guiding principles of the Expeditionary Learning. The assistant will specifically be trained and directed to help students in grades 3 and up who, in the first years of the school or in their first years enrolled in the school, will be adapting to new expectations for conduct compared to their experience at other schools.

- Assisting classroom teacher in instruction, communication, and preparation duties;
- Supervising students in flexible groupings and settings, including recess, outdoor learning opportunities, and field trips;
- Focusing on managing students conduct and school culture appropriate to Expeditionary Learning;
- Providing scheduled or unscheduled supervision in classrooms during a teacher’s non-contact time;
- Working with students to develop teamwork and leadership skills; and
- Supervising students in outdoor learning activities, field trips, and recess.

Requirement: NM Educational Assistant License

Accountability: Director or Director’s appointee.

### **Year 1:**

1 Director

1 secretary

0.5 custodian

2 K teachers: 24:2

4 teachers Grade 1-4: Ratio: 24:2

4 Assistants Grade 1-4

Contracted services: nurse, counselor

### **Year 2:**

Same as Year 1 plus 1 each Grade 5 teacher and assistant: Ratio: 24:2

### **Year 3:**

Same as Year 2 plus 1 Grade 6 teacher: Ratio: 24:1 at 6<sup>th</sup> K-5 Ratio 24:2

### **Year 4:**

Same as Year 3 plus 1 Grade 7 teachers, endorsed in LA & Social Studies OR endorsed in Science and Math (together the 6<sup>th</sup> grade and 7<sup>th</sup> grade will be “middle grades” ) Ratio 24:1 at 6-



7, K-5 Ratio 24:2

**Year 5:**

Same as Year 4 plus 1 Grade 8 teachers, endorsed in LA & Social Studies OR endorsed in Science and Math (together the 6, 7, 8 grade will be “middle grades” ) Ratio 24:1 at 6-8, K-5 Ratio 24:2

## **E. EMPLOYEE RELATIONS**

Uplift Community School will comply with all Federal and State Non-discrimination requirements, as put forth in the 1999 Charter School Act, 22-8B-4A, NMSA 1999.

The following Federal Requirements will be met:

- Equal Pay Act of 1963
- Title VII of the Civil Rights Act of 1964
- Age Discrimination in Employment Act of 1967
- Title IX of the Education Amendments of 1972
- Section 504 of the Rehabilitation Act of 1973
- Age Discrimination Act of 1975
- Americans with Disabilities Act of 1990
- Civil Rights Act of 1991
- Part B of the Individuals with Disabilities Education Act of 1997
- Equal Employment Opportunity Commission Regulations and the State Requirements:
- New Mexico Human Rights Act of 1969

Uplift Community School’s staff discipline process will be developed in accordance with expectations to provide due process during the initial planning year of the approved charter. All personnel policies and procedures will comply with applicable law. The Personnel Handbook will be developed by the Director during the start-up year. All employees will be given an updated copy of these policies during the first staff meeting of each academic year or when revised.

In addition, Uplift Community School will be guided in its development of such policies by the following principles:

- Consulting and collaborating with employees;
- Maintaining a balance of the school’s responsibilities to safeguard employee rights and due process while maintaining the greatest commitment to the welfare of the students; and
- Adherence to the principle of progressive discipline and collaborative employee evaluation.

### **Qualifications and Hiring**

In accordance with NMAC Title 6, Chapter 61, the Uplift Community School will retain or employ teachers, administrators and other instructional personnel who hold appropriate New Mexico licensure in elementary education, (K-8) and/or necessary endorsements as issued by the New Mexico Public Education Department Licensing Division. Qualifications for Uplift Community School teachers and administrators will include, but not be limited to, years of teacher and administrator experience, familiarity with State of New Mexico content and benchmark standards, and demonstrated commitment to the Expeditionary Learning philosophy and teaching methods of Uplift Community School.

Instructional support staff will have an appropriate mix of subject matter expertise, professional experience, and the demonstrated ability to work successfully in an instructional support capacity.

All non-instructional staff and teachers will possess the experience and expertise required for their position within the school as outlined in the school staffing plan and the school's adopted personnel policies and in accordance with the School Personnel Act.

All staff shall meet New Mexico Public Education Department and any other state of New Mexico safety requirements, including background checks and fingerprinting in the method as mandated by the State.

### **Recruitment**

Uplift Community School will recruit individuals for open positions through a public process, including advertising in local and state newspapers and professional printed media, referral, and through appropriate electronic recruitment mechanisms.

In accordance with the Charter Schools Act, Uplift Community School employees are not employees of the Gallup-McKinley County Schools, but shall be hired directly by Uplift Community School. Uplift Community School employees will be hired in accordance with all state and federal employment rules and regulations and in compliance with the School Personnel Act.

### **Equal Opportunity Employer**

Uplift Community School will abide by state and federal laws dealing with equal employment opportunity. Therefore, in order to provide equal employment and advancement opportunities to all individuals, employment decisions at Uplift Community School will be based on merit, qualifications, and abilities. Uplift Community School does not discriminate in employment opportunities or practices on the basis of race, color, religion, gender, national origin, age, disability, sexual orientation, or any other characteristic protected by law.

Uplift Community School will make reasonable accommodations for qualified individuals with known disabilities unless doing so would result in an undue hardship that state and federal laws recognize as just.

This policy governs all aspects of employment, including selection, job assignment, compensation, discipline, termination, and access to benefits and training. An employee leaving his/her position with Uplift Community School will not have an employment right to a position with the Gallup-McKinley County Schools.

### **Employee Benefits**

Uplift Community School will participate in the state of New Mexico Educational Retirement Act (ERA) administered by the Educational Retirement Board (ERB). Eligible employees participate in the retirement plan subject to all terms and conditions of the plan. Regular full-time and regular part-time employees will be eligible to receive benefits, including, but not limited to, paid time off, health insurance, and health benefits provided by enrollment in NMSIA.

### **Employee Policies and Procedures**

An Uplift Community School Personnel Handbook will be developed by the Director in accordance with guidelines in this charter application during the startup year. This handbook will be compliant with all federal and state regulatory requirements and with the School Personnel Act.

The Uplift Community School Personnel Handbook will also address the relatively long contract required of its teachers, upon whom much of the responsibility of curriculum development rests, and for whom non-contact professional development days will be scheduled throughout the school year each year as well as during the summer in order to create and constantly adjust Expeditionary Learning curriculum to suit dynamic student, parent and community needs. The salary schedule below presents a minimum of 5% increase in pay as compared to surrounding Gallup-McKinley County Schools. Additional strategies to attract and sustain the teaching staff may include a policy providing for up to 5 personal days of leave during the school year.

### **Relationship with Teacher Labor Representatives**

If the staff chooses, through the proper procedures, to establish a relationship with a labor representative, the Governing Council and the administration of Uplift Community School will willingly work with the labor representative. However, there is no relationship with labor representatives at this time.

### **Collective Bargaining Agreements**

The staff may conduct a vote in order to pass collective bargaining agreements with the Director.

### **Salary Schedules**

Uplift Community School reserves the right to set its own salary schedule. Pursuant to the School Personnel Act, compensation shall include a combination of base salary and benefits. Uplift Community School shall comply with all applicable state and federal employment taxes. Compensation of all employees will be based on experience, qualifications, individual performance, and duties. All compensation decisions shall be at the discretion of the Governing Council and within approved budget constraints. Below are draft salary schedules for each salaried position, with teaching salaries based on the Gallup-McKinley County Schools with a 7% increase to compensate for the extended contract days required at Uplift Community School.

**Teacher Salary Schedule for Level I, 197 Days**

Step	BA	BA15	BA45/MA	MA15	MA45
0	32,275	32,600	32,920	33,245	33,675
1	32,285	32,610	32,930	33,255	33,685
2	32,295	32,620	32,940	33,265	33,695
3	32,305	32,630	32,950	33,275	33,705
4	32,315	32,640	32,960	33,285	33,715
5	32,325	32,650	32,970	33,295	33,725

**Teacher Salary Schedule for Level II, 197 Days**

Step	BA	BA15	BA45/MA	MA15	MA45
0	43,035	43,045	43,055	43,065	43,075
1	43,045	43,055	43,065	43,075	43,085
2	43,055	43,065	43,075	43,085	43,095
3	43,065	43,075	43,085	43,095	43,105
4	43,075	43,085	43,095	43,105	43,115
5	43,085	43,095	43,105	43,115	43,125
6	43,095	43,105	43,115	43,125	43,135
7	43,105	43,115	43,125	43,135	43,145
8	43,115	43,125	43,135	43,145	43,155
9	43,125	43,135	43,145	43,155	43,165
10	43,135	43,145	43,155	43,165	43,175

**Teacher Salary Schedule for Level III, 197 Days**

Step	BA	BA15	BA45/MA	MA15	MA45
0	53,790	53,800	53,810	53,820	53,830
1	53,800	53,810	53,820	53,830	53,840
2	53,810	53,820	53,830	53,840	53,850
3	53,820	53,830	53,840	53,850	53,860
4	53,830	53,840	53,850	53,860	53,870
5	53,840	53,850	53,860	53,870	53,880
6	53,850	53,860	53,870	53,880	53,890
7	53,860	53,870	53,880	53,890	53,900
8	53,870	53,880	53,890	53,900	53,910
9	53,880	53,890	53,900	53,910	53,920
10	53,890	53,900	53,910	53,920	53,930
11	53,900	53,910	53,920	53,930	53,940
12	53,910	53,920	53,930	53,940	53,950

**Director Salary Schedule**

Starting salary for qualified Director. \$75,000. Increases are at the discretion of the Governing Council.

**Administrative Assistant Salary 200 Days**

Starting salary for Administrative Assistant \$16,000.

**Custodian Salary 240 Days**

Starting salary for the custodian is \$19,000.

**Instructional Assistant Salary Schedule 197 Days**

Step	HS	HS15	HS30	HS45	AA/HS60
1	14,020	14,260	14,500	14,740	14,990
2	14,250	14,550	14,850	15,160	15,440
3	14,480	14,840	15,200	15,580	15,900
4	14,710	15,140	15,550	16,000	16,370
5	14,940	15,340	15,900	16,420	16,830
6	15,170	15,640	16,260	16,830	17,040
7	15,400	15,940	16,620	17,250	17,380
8	15,730	16,240	16,980	17,670	17,900
9	15,960	16,540	17,340	18,090	18,100
10	16,200	16,900	17,700	18,500	18,300

**Staff Evaluation by the Director**

Uplift Community School will evaluate its licensed teaching staff and Director in accordance with the School Personnel Act and as mandated by the Public Education Department.

Additionally, instructional support and administrative staff will be formally evaluated upon their anniversary date, and all staff provided with informal, ongoing coaching as needed.

Uplift Community School aims to create a working environment that is supportive and empowering, and fosters growth for its employees, as it does for students. Uplift Community School will, as a minimum, provide its employees with performance evaluations conducted by the Director.

**The yearly evaluation will include any of the following evidence:**

- Informal or formal observations by the Director
- Review of videotape;
- Written documentation of activities;
- Locally developed survey of staff, students, and/or parents;
- Review of student work and performance;
- Review of the teacher’s contribution to the school’s vision, mission, goals, and outcomes;
- Portfolios;

- Information gained through peer observation and/or peer coaching;
- Anecdotal records;
- Reflective journals;
- Self-evaluations: instructional artifacts; and other formats satisfactory to the teacher and the Director.
- Evidence of service, collaboration, or leadership in the school

The Director will oversee the annual evaluation of all staff. Teachers will complete a Professional Development Plan (PDP). The PDP will be designed by the Director with consideration for both the New Mexico PED requirements and the unique mission and goals of our school.

### **Staff Discipline and Due Process**

An Uplift Community School Personnel Handbook including discipline and dues process policies will be developed by the Director in accordance with guidelines in this charter application during the startup year. This handbook will be compliant with all federal and state regulatory requirements and with the School Personnel Act.

## **F. STUDENT ENROLLMENT PROCEDURES AND DISCIPLINE POLICY**

### **Admissions**

Uplift Community School will not discriminate on the basis of ethnicity, religion, gender, economic status, or disabilities, or limiting conditions. The enrollment process will be held in accordance with all applicable laws and the published guidance provided by the PED's Charter Schools Division.

Uplift Community School will enroll students in an open lottery for which there will be open, publicly advertised application periods of 10 to 20 days, during which Uplift Community School will have at least one regularly scheduled orientation meeting designed to provide information about the school, answer questions and distribute lottery applications. At the conclusion of the advertised open application period, a random lottery will be held for classes that are not filled. For classes that do not meet capacity, all students who have completed and submitted an application within the open application period will be included in the admissions lottery. Students' names will be drawn randomly from among all the students who have submitted a request for enrollment through the conclusion of the open application period, until capacity is reached.

All remaining students not selected for enrollment through the lottery will be placed on a waiting list, their position on the waiting list being determined by random selection as for lottery enrollment at the time of the official lottery. As openings may occur, students will be enrolled from this waiting list in the order determined during the official lottery.

Regularly scheduled lotteries conforming to the specifications above may be conducted throughout the year in order to address any potential openings throughout the school year as needed.

Participation in Uplift Community School's enrollment lottery is open to students throughout New Mexico. Preferential enrollment will only be given to siblings of students already enrolled in the school during a previous year pursuant to state law. The order of enrollment preference in subsequent years is as follows:

1st Preference: Returning Students

2nd Preference: Siblings of Returning Students

3rd Preference: Students selected in the Uplift Community School Enrollment Lottery

The lottery does not guarantee admission. The lottery determines preference in filling available spots based upon the order in which names are drawn. Once a grade level is filled, any remaining names are placed on a waiting list for that school year in the order in which their names were drawn in the lottery.

To be eligible for the enrollment lottery a student must complete and enrollment request form. Once selected through the lottery process, the students must attend an in-person meeting with the Director or the Director's designee and submit an appropriately enrollment request form as determined by the Director. Neither the in-person meeting nor the enrollment request form shall be used to discriminate or prohibit enrollment of any student, nor shall the information provided by either be used to select participants in the lottery, but shall provide information to Uplift Community School that will contribute to strong relationships between Uplift Community School and families of enrolled students, such as preferred methods of communication, hours of availability during or after the school day, inventory of students' learning style, etc. At the request of any applicant, the in-person meeting requirement may be waived by the Director if an appropriately completed application form is provided.

The in-person meeting, furthermore, is an opportunity to aid students and families in completing the application, so that level of literacy will not be a barrier to participation in the lottery.

To be eligible for enrollment, a student must provide proof of minimum age as established by regulation.

### **Timeline for Startup Year Enrollment**

1. Initial Outreach, Phase One. September – December 2011
2. Website, office site, phone number and U.S. Postal Service established for Uplift Community School
3. Recruitment, Phase Two. January-March 2012. Recruitment will focus on the greater Gallup area, including rural areas surrounding Gallup within the county. These recruitment efforts may include:
  - Presentations at area preschools

- Presentations at community centers, Navajo chapter houses, and meetings of community organizations
- Outreach at neighborhood businesses, hospitals and offices
- Open house events welcoming the general public to the school site/startup office
- Brochures left at businesses
- Cold calling in neighborhoods in the vicinity of Uplift Community School location
- Presentations at home-schooling events

At the end of Phase Two, applications will be accepted for enrollment, 10-20 days prior to the Enrollment Lottery.

4. Enrollment, Phase Three. March-April 2011. A lottery will be held in March. If necessary, a lottery will be held again after continued outreach and marketing of the new school. If the school is not fully enrolled by the end of phase three, it will move to Phase Four.
5. Late Enrollment, Phase Four. May – August 2011. Recruitment strategies will include, in addition to those listed above:
  - Additional round of informational open houses in school-ready facility
  -

#### **No Tuition or Admission Requirements**

Uplift Community School will not charge tuition nor have admission requirements, except as otherwise provided in the Public School Code, sections 22-1-1 ET SEQ., NMSA 1978. This statement will be included in all lottery materials and may also be included in marketing materials.

#### **Student Discipline Policy**

Student discipline and rights policies will comply with the Student Rights and Responsibilities set forth in the Public Education Department rules and regulations [6.11.2 NMAC]

All students have the right to learn in a safe environment. At Uplift Community School there will be a shared responsibility between students, parents, and staff in providing a productive learning atmosphere. Enforcement of school rules, including disciplinary action, shall be the responsibility of the Director.

#### **Principles of Student Discipline Policy**

Principles guiding the formation of student conduct policy are enumerated in the Expeditionary Learning Core Practice III. Culture and Character, grouped within the following Benchmarks:

1. Building School Culture and Fostering Character
2. Ensuring Equity and High Expectations
3. Fostering a Safe, Respectful, and Orderly Community
4. Promoting Adventure and Fitness
5. Developing a Professional Community



## **Habits of Work**

In the term, “Habits of Work,” Expeditionary Learning connects student conduct to a culture of professionalism in which the work done for learning is taken seriously by students, teachers, and the community. Uplift Community School will create a behavior contract articulating a code of conduct, or Habits of Work, to be signed by both parent/guardian and the student, and to which they will be held accountable.

The code of conduct will be developed by the Director and teachers in collaboration with the Advisory School Council and annually revisited and revised, is necessary. It will address issues of school culture as they relate the Mission Statement and Expeditionary Learning Design Principles, Core Practices and Benchmarks.

## **Supporting Positive Behavior**

Uplift Community School staff will implement a system of supporting positive behavior choices among the students such as a comprehensive Positive Behavior Support Plan in order to prevent students from making poor choices in behavior while promoting positive behaviors with the goal of focusing the school culture on learning and growth as described in the Core Principles and Benchmarks of Expeditionary Learning Schools.

“The key features of PBS, as identified by a pioneer in the field, George Sugai, include:

- a prevention-focused continuum of support;
- proactive instructional approaches to teaching and improving social behaviors;
- conceptually sound and empirically validated practices;
- systems change to support effective practices; and
- data-based decision making.” (2010 Crisis Prevention Institute, Inc., p.1)

The Director will be responsible for understanding the legal requirements for discipline in relation to students with disabilities. Positive Behavior Support and Nonviolent Crisis Intervention® approaches are two examples of systems that are widely used, comply with regulations and work to the benefit of all students.

## **G. FACILITIES**

### **Plan for Future School Facilities**

The plan for school facilities is based on the following assumptions of the governing council:

The governing council understands the requirements of 22-8B-4.2 NMSA 1978 and the importance of compliance with all applicable laws, including local health and safety ordinances and the Statewide Adequacy Standards for public schools.

McKinley County, the City of Gallup, along with the Public Schools Facility Authority and Poms and Associates, will be consulted to ensure that the site identified is appropriate for a public school building before entering into a lease contract. The governing council also understands that an appropriate educational occupancy certificate must be obtained before beginning operations. The governing council acknowledges that the site also must comply with 22-8B-12B NMSA 1978.

The school will demonstrate that the facility meets the requirements of 22-8B-4.2 NMSA 1978 in accordance with applicable rules of PEC.

1. No Gallup-McKinley County owned school facilities are available to be leased to Uplift Community School at this time.
2. The Downtown Gallup area is a desirable location for the school
  - a. Because of its proximity to cultural and educational resources which could be an important part of the educational program. Such resources include the City of Gallup Children's Library, the Foundations of Freedom Dance Studio, several art galleries, the Rex Historical Museum, the Cultural Center, City and County offices, the Downtown Plaza and its nightly Indian Dances, and several public murals illustrating history and culture of the city.
  - b. Because of its location on the edge of three other public elementary school districts, so that the impact of drawing students to the charter school away from any single Gallup-McKinley County school would be minimal.
  - c. Because of the proximity of the location to North Side, Downtown, and Chihuahita neighborhoods for independent walking and biking to school.
  - d. Because of the existence of several empty buildings from 10,000 square feet to 30,000 square feet which have potential as conversion to E Occupancy for our school.
3. Uplift Community School will request capital outlay assistance to make lease payments which aid a lessor such as the City of Gallup in recouping the cost of renovation of a purchased building.
4. The Public School Capital Outlay Amendment to the Public School Capital Outlay Act provides opportunities to request grant assistance for a capital project which Uplift Community School will pursue.
5. The Lease to Purchase Act may allow Uplift Community School to enter into a Lease to Purchase Agreement on a facility.
6. The Public School Capital Outlay Council's Lease Assistance Grant may provide for charter school lease payments in the amount of \$700 per student, or \$98,000 in the first year.
7. The school may approach a legislator to carry a bill to obtain funds for capital expenditures;
8. Uplift Community School may locate in temporary facilities until a permanent location can be secured

9. The school building at full capacity will need approximately 9,500 square feet of classroom space, and 5,000 square feet of office, meeting rooms, storage, hallway, and other space in order to accommodate the projected student enrollment and staffing. If the building is to include an indoor recreation area, such as a gym, and kitchen facilities, an additional 5,000 to 7,000 square feet will be required. According to 6.27.30 NMAC, Statewide Adequacy Standards:
  - a. The kindergarten classroom of 24 students a minimum of 1200 sf.
  - b. Each grade 1-5 classroom of 24 students a minimum of 768 sf.
  - c. Each 6-8 classroom of 24 students a minimum of 672 sf.
  - d. If a gymnasium is included in the building it must meet minimum requirement for middle school gymnasium at 5,200 square feet.
  - e. Uplift Community School is inclined to include in its facilities plan a family resource room and non-educational resources such as laundry facilities or day care facilities in order to better serve families whose children are enrolled.
  - f. An outdoor playground is a desirable feature of the facilities.
  - g. A school bus pick-up and drop off area will be required according to a transportation plan.
10. Uplift Community School cannot enter into any type of rental agreement with any person or agency prior to the granting of a Charter by the State of New Mexico, and will not receive any of the funds necessary to secure any lease of property until approximately April 1, 2010. Therefore, Uplift Community School cannot secure any site or facility at this time.

The plan for identifying and securing an adequate facility begins with notice of approval and application to become a Board of Finance. Using federal startup grant funds Uplift Community School will hire a start-up year Coordinator to explore all facilities options and present the best options to the Governing Council in December, 2010.

By January, 2011, a draft lease agreement will be created and submitted for approval by the New Mexico Public School Facilities Authority.

In April, 2011, the leased facility will be available for open houses, public lottery events, and student admissions meetings.

By August, 2011, the facility will be ready for occupancy and will hold a Certificate of Educational Occupancy.

Uplift Community School will use the following criteria to evaluate sites and facilities:

1. Ability of the site and/or facility to help Uplift Community School achieve its goals.
2. Conformance with federal, state, and local regulations regarding building adequacy, safety and accessibility.
3. Appropriate location for the student population and its access to compatible uses

4. Short term and long-term space requirements.
5. Expense of operation of facilities.

Besides seeking funding from the Lease Assistance Grant, we will also look for grants and other funding to help support the costs of renting a facility, and either form a non-profit organization independent of the school or work with a Charter School Coop or Foundation in order to buy property and lease it back to the school.

## **H. OTHER STUDENT SERVICES**

### **Transportation**

Uplift Community School intends to provide transportation to and from school. The school intends to coordinate transportation services with Gallup McKinley County Schools, the City of Gallup public transportation program, or other school transportation providers to transport students to and from the school. The Uplift Community School will pursue funding through the PED Transportation Bureau.

Uplift Community School will provide transportation to all Special Needs students who's IEP specifically calls for transportation. This transportation will be at no cost to the parent or the student and the transportation will comply with all state and federal law.

Uplift Community School has budgeted operational funds for field trips and extracurricular activities.

### **Food Service**

### **Wellness Policy**

Uplift Community School is dedicated to teaching students healthy nutritional practices. In accordance with the New Mexico PED's School District Wellness Policy Guidance Document, Uplift Community School believes that "developing a comprehensive school wellness policy is essential to the academic success and lifelong well-being of students." Uplift Community School plans to create a School Health Advisory Council (SHAC) from the ASC membership to draft for Council adoption a wellness policy that addresses the following areas:

1. Physical activity guidelines for before, during and/or after school.
2. Family, school and community involvement guidelines.
3. Nutrition guidelines for a la carte offerings minimally meeting guidelines set forth in subsection B of 6.12.5.8 NMAC.
4. Nutrition guidelines for school sponsored fund raisers during normal school hours minimally meeting guidelines set forth in paragraph (1) of subsection C of 6.12.5.8 NMAC.

5. Nutrition guidelines for school sponsored fund raisers before and after school hours ensuring that at least fifty percent of the offerings shall be healthy choices in accordance with the requirements set forth in paragraph (2) of subsection C of 6.12.5.8 NMAC.
6. 6. A plan for measuring the implementation and evaluation of these guidelines using the NMPED Evaluation Template.

The SHAC will also draft for Council adoption a wellness policy that addresses guidelines for health education, physical education, behavioral health, school safety, health services and staff wellness in accordance with all applicable state and federal law.

### **School Food Authority**

Uplift Community School intends to apply as a School Food Authority in order to administer Federal school lunch, breakfast, and milk programs for enrolled students who are eligible. The school may facilitate the provision of contract meals and/or student access to Federal Free and Reduced Lunch, Breakfast and Milk Subsidies as dictated by the National Student Lunch Program. In the event of developing an appropriate food preparation facility, the school will meet all State and/or Federal regulations and health codes. In compliance with Federal Law, the school will have all the necessary records for the students eligible for free or reduced lunches available for review. Students who are not eligible will provide their own lunches, or in the case that Uplift Community School is not able to receive special funding for the above-mentioned Food Services, all students will be expected to provide their own lunches.

### **Counseling Services**

Uplift Community School will provide counseling services as needed. Students will be directed to group and one-on-one counseling as determined by the Student Assistance Team. We will contract these services with local providers.

### **Health Services**

Uplift Community School will provide health services as needed. A qualified contract health care provider will be responsible for maintaining Cumulative Student Health Records for each student and provide health services for students. Uplift Community School will comply with all immunization and blood-borne pathogen laws.

### **Handicap Accessibility**

Uplift Community School will meet all Federal and State requirements for providing full handicap accessibility. The school's facility will be handicap accessible and all activities will be adapted to meet the need for access. Certain expenses related to bringing the facility up to code for accessibility may be spent from Federal Startup Funding during the start-up year.

### **Diagnostic Services**

Uplift Community School will contract for the services of a diagnostician as necessary.

### **Other Services**

Uplift Community School will contract for the services of a psychologist, social worker, occupational therapist and speech therapist as specified in student IEP's.

## VIII. REQUIREMENTS

The Requirements section of the application addresses the necessary arrangements that school leaders must make to define the respective legal liability and responsibility of the governing body and the Public Education Department. These requirements include, but are not limited to, securing appropriate insurance coverage and identifying waivers that will be sought by the school from the Public Education Department.

### A. LEGAL LIABILITY AND INSURANCE COVERAGE

Uplift Community School will maintain adequate insurance coverage as addressed in 6.50.1 et al NMAC and by the Public Schools Insurance Authority Act, 22 et seq. NMSA 1978. The New Mexico Public School Insurance Authority (NMPSIA) provides insurance for employees' benefits and property and liability coverage. Uplift Community School will provide Worker's Compensation Insurance through NMPSIA and will adhere to all statutory regulations regarding application of this program. Premiums are determined for health, vision, dental and LTD coverage by the Authority and their staff with procedures set by statute. Property and liability coverage are determined by a claims loss ratio by the Authority and their insurance carrier. A memorandum of coverage is provided to the Insurance Authority for each fiscal year and forwarded to the provided under the risk insurance program.

### B. WAIVERS

Uplift Community School expects to request the following waivers so that it may fulfill the purpose of the 1999 Charter Schools Act 22-8B-15, NMSA 1978.

NMSA 1978 §22-8B-5(2006) provides that the department will waive requirements or rules and provisions of the Public School Code pertaining to individual class load, teaching load, length of the School day, staffing patterns, subject areas, purchase of instruction materials, evaluation standards for school personnel, principal duties and drivers education. Pursuant to this provision the School is identifying the automatic waivers it intends to implement and how it will address the particular issue.

Waiver Requested	Rationale for Waiver.
Individual class load NMAC 6.29.1	The School proposes to have a student ratio of no greater than 1:12 in grades K-5 and 24 in grades 6-8 and consequently classes will not exceed maximum size for the core subject areas. However, depending on the student enrollment and particular activities, it is possible that certain classes and individual class loads in extracurricular activities may exceed the maximum for a licensed teacher. For

Waiver Requested	Rationale for Waiver.
	example, Music, Outdoor Education, or Physical Education classes may be taught in a large group with a licensed teacher.
School personnel evaluation standards.	Employees of the Uplift Community School will be evaluated based on criteria that considers the evaluation standards described in NMAC 6.69.3 and 6.69.4, but which may deviate to insure that the standards used are relevant the uniqueness of the school's mission and vision.

## **IX. APPENDICES**

Appendix A: Uplift Community School: proposed personnel policies (1 page)

Appendix B: Uplift Community School: proposed student discipline procedures (2 pages)

Appendix C: Uplift Community School: Form 910B5, Years 1-5 (15 pages)

Appendix D: Uplift Community School: 5-Year Budget Plan (2 pages)

Appendix E: Bibliography (1 page)

Appendix F: Expeditionary Learning School: Performance Report (16 pages)



# Appendix A

## **Proposed Personnel Policies**

An Uplift Community School Personnel Handbook including discipline and dues process policies will be developed by the Director in accordance with guidelines in this charter application during the startup year. This handbook will be compliant with all federal and state regulatory requirements and with the School Personnel Act.

The Personnel Policies will be written by the director by June 15, 2012. The Governing Board will review the policies to have them approved before educational staff is hired. All policies will be in compliance with all federal and state requirements.

## Appendix B

### **Proposed Student Discipline Procedures**

The students discipline procedures will be written by the director by June 15, 2012. The Governing Board will review the policies to have them ready for staff review in July 2012. All policies will be in compliance with all federal and state requirements.

The policy will follow the principles of the student discipline policy. (see below)

### **Student Discipline Policy**

Student discipline and rights policies will comply with the Student Rights and Responsibilities set forth in the Public Education Department rules and regulations [6.11.2 NMAC]

All students have the right to learn in a safe environment. At Uplift Community School there will be a shared responsibility between students, parents, and staff in providing a productive learning atmosphere. Enforcement of school rules, including disciplinary action, shall be the responsibility of the Director.

### **Principles of Student Discipline Policy**

Principles guiding the formation of student conduct policy are enumerated in the Expeditionary Learning Core Practice III. Culture and Character, grouped within the following Benchmarks:

6. Building School Culture and Fostering Character
7. Ensuring Equity and High Expectations
8. Fostering a Safe, Respectful, and Orderly Community
9. Promoting Adventure and Fitness
10. Developing a Professional Community

### **Habits of Work**

In the term, “Habits of Work,” Expeditionary Learning connects student conduct to a culture of professionalism in which the work done for learning is taken seriously by students, teachers, and the community. Uplift Community School will create a behavior contract articulating a code of conduct, or Habits of Work, to be signed by both parent/guardian and the student, and to which they will be held accountable.

The code of conduct will be developed by the Director and teachers in collaboration with the Advisory School Council and annually revisited and revised, if necessary. It will address issues of school culture as they relate to the Mission Statement and Expeditionary Learning Design Principles, Core Practices and Benchmarks.

### **Supporting Positive Behavior**

Uplift Community School staff will implement a system of supporting positive behavior choices among the students such as a comprehensive Positive Behavior Support Plan in order to prevent students from making poor choices in behavior while promoting positive behaviors with the goal of focusing the school culture on learning and growth as described in the Core Principles and Benchmarks of Expeditionary Learning Schools.

“The key features of PBS, as identified by a pioneer in the field, George Sugai, include:

- a prevention-focused continuum of support;
- proactive instructional approaches to teaching and improving social behaviors;
- conceptually sound and empirically validated practices;

- systems change to support effective practices; and
- data-based decision making.” (2010 Crisis Prevention Institute, Inc., p.1)

The Director will be responsible for understanding the legal requirements for discipline in relation to students with disabilities. Positive Behavior Support and Nonviolent Crisis Intervention® approaches are two examples of systems that are widely used, comply with regulations and work to the benefit of all students.

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