

Taos Mountain Charter School
Charter Application
Appendices

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Public Education Department

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APPENDIX A: COURSE SCOPE AND SEQUENCE

A-1: GRADE BY GRADE OVERVIEW

A grade-by-grade overview of the curriculum is provided below; variations in the general curriculum may occur depending on the teacher, the particular class, and the year. A checklist/narrative system will be developed with by the Taos Mountain Charter School Faculty, in conjunction with the Coordinator and the Governing Council, that will allow teachers to accurately track how the New Mexico Common Core State Standards are being met within the school. The following curriculum represents the Waldorf curriculum sequencing and content by grade level in the following areas of study. The Waldorf-inspired curriculum is fully sequenced. During our planning year there will be further work on the cultural and nature based curriculum. Further research on curriculum development will be done looking at other Waldorf-inspired charter school models.

KINDERGARTEN CURRICULUM

The Taos Mountain Charter School Kindergarten curriculum is developmental; that is, we meet the children “where they are,” while simultaneously laying the foundation for academic success in later grades.

Language Arts: Literacy begins in the kindergarten with a rich oral language base. The teachers use puppetry, engage the children in acting out stories rich in vocabulary and imagination, as well as lead singing games to teach comprehension strategies such as story sequence and character development.

Math: the fundamental concepts of mathematics are introduced through creative play and daily practical activities. Mathematics begins in the kindergarten with sorting, one-on-one correspondence, counting from 1 to 30, patterning, and identifying shapes. They count, compare, describe, and sort objects, and develop a sense of properties and patterns. They explore economics through imaginative play that involves sorting and trading objects of different sizes and properties.

Science: In the physical sciences, students’ creative play involves them deeply in exploring basic physics principles, such as mass, density, gravity, balance, and the creation of pulleys and levers. Students experience the properties of heat and cold through time spent in the kitchen cooking with the teacher, as well as observing seasonal changes. Life science and earth science start with students observing common objects using their five senses. Students learn to communicate observations orally and through drawings.

Problem-Solving: Creative play provides students with opportunities to imagine, plan, and carry out increasingly complex activities. During creative play, teachers guide students' growing capacities for creative problem solving and social interaction.

FIRST GRADE

Math: Qualities of numbers; introduction to the four operations of arithmetic; geometric forms; whole number processes; counting rhythms; times tables 1 through 6 and 10

Language Arts: Pictorial and phonetic introduction to the alphabet; word recognition; writing; poetry recitation; and fairy and folk tales from around the world

Science: Nature stories; nature walks; observations; gardening; local environment; seasons Music and Performing Arts: Singing games; interval and/or pentatonic flutes (developing finger coordination, concentration, breath control); songs based on seasonal themes; in-class drama

Art: Form drawing; wet-on-wet watercolor painting (emphasizing an experience of working with color rather than creating formed pictures); beeswax modeling; crayon illustrations

World Language: At least one world language (Spanish) will be introduced through plays, songs, rhythms, poems and games

Handwork: Knitting with two needles (promotes eye-hand coordination, fine motor skills, and arithmetic skills, sequencing, patience, perseverance and self-esteem); seasonal crafts

History & Social Studies: Fairy & folk tales, rhymes; poems; songs

Geography: Spatial orientation; body geography

Physical Education: Circle games, eurythmy

SECOND GRADE

Math: Continue with four operations of arithmetic; story problems; number patterns; times tables 7 through 12, two digit multiplication, carrying and borrowing, written calculations

Language Arts: Reading and writing; phonetics; elements of grammar; spelling, punctuation, beginning cursive writing; Animal fables and myths and legends of heroic people from around the world

Science: Garden and nature studies; school and local environment, seasons; animals

Music and Performing Arts: Singing; pentatonic flute; in-class drama and performance

Art: Continue form drawing; watercolor painting; beeswax modeling, crayon drawings

World Language: One or two languages continued (vocabulary, counting, animals, colors)

Handwork: Knitting patterns of knit and purl (pattern recognition and perpetuation, concentration, fine motor skill development); crocheting

History & Social Studies: Legends and stories of heroic people

Geography: Natural studies

Physical Education: Rhythmic games, line games, eurythmy

THIRD GRADE

Math: Memorization of multiplication tables (1 through 12) continued and strengthened; weight; measure; length; volume; money; time; continued two and three digit multiplication; long division

Language Arts: Elements of grammar (nouns, verbs, adjectives, adverbs); continuing cursive spelling and punctuation; compositions; Stories from ancient history, continued reading

Science: Gardening; soil; nature studies; animal husbandry; conservation; cooking; house building; farming

Music and performing arts: Singing in rounds; pentatonic/C flutes/recorders; in-class skits; performance of annual class play; recorder music notation; possible addition of violin/cello

Art: Continue form drawing; painting; beeswax modeling; crayon and pencil drawing

World Language: One or two languages continued enhancing and holistically in support of the core curriculum (songs, plays, poetry, conversations, and vocabulary)

Handwork: Crocheting (pattern and placement recognition, finger dexterity); hand sewing

History & Social Studies: Study of practical life (house building, clothing, and cooking) around the world

Geography: History of Farming and House building

Physical Education: Traditional Games, dancing, eurythmy

FOURTH GRADE

Math: Continuation of long division; fractions; averages; factoring

Language Arts: Elements of grammar; continuing cursive, spelling and punctuation; book reports; creative writing; composition; Norse and Finnish mythology, Indian Legends and local history

Science: zoology, animals in their environment; continuation of gardening and nature Studies

Music and Performing Arts: Singing and flutes in rounds; possible addition of violin/cello; music theory; choir, reading music notation

Art: Advanced (woven) form drawing; painting; clay modeling

World Language: One or two languages continued (songs, plays, poetry, conversations, cultural activities, vocabulary, beginning writing)

Handwork: Cross-stitch; embroidery; knotting; braiding (creating patterns from front to back)

History & Social Studies: New Mexico and local history

Geography: New Mexico and local geography; map making

Physical Education: Folk dancing; Relay Races, eurythmy

FIFTH GRADE

Math: Decimals; fractions; metric system; geometry as it developed in ancient cultures

Language Arts: Elements of grammar and spelling; sentence structure; descriptive writing; continuing cursive, punctuation and compositions; Greek, Indian, Persian and Egyptian myths, business letter writing, report writing

Science: Botany; Inductive Method; continuation of garden and nature studies

Music and Performing Arts: Singing; flute; violin/cello; 3-part choir

Art: Freehand geometric drawing; painting; clay modeling, drawing

World Language: One or two languages continued (simple conversations, poetry, cultural activities, vocabulary, continued writing)

Handwork: Knitting in rounds; knitting socks, hats, or mittens (develop and follow written instructions), woodcarving

History & Social Studies: Mythology and life in ancient civilizations from ancient India through ancient Greece. Greek history through Alexander the Great

Geography: North American geography as related to vegetation, agriculture, culture and Economics

Physical Education: Greek Olympic games preparations (the pentathlon), eurythmy

SIXTH GRADE

Math: Percent; beginning algebra and negative numbers; ratios; proportions; geometric drawing with instruments and proofs; business math

Language Arts: Advanced grammar; descriptive compositions; expository writing, spelling; biographies; The Roman Empire and Medieval Literature, research methods and report writing

Science: Mineralogy; physics (acoustics, electricity, magnetism, optics and heat); beginning astronomy; continuation of garden and nature studies

Music and Performing Arts: Singing in parts; flute; violin/cello; choir

Art: Geometry with compass/ruler; painting; clay relief modeling; woodcarving

World Language: One or two languages continued, reading and translation stories

Handwork: Pattern making; 3-D construction (visualizing from two-dimensional to three dimensional finished product)

History & Social Studies: The Roman Empire and Medieval History

Geography: World Geography with an emphasis on European and South American Geography

Physical Education: Sport skills some in preparation of Medieval Games, eurythmy

SEVENTH GRADE

Math: Algebra; mathematical thinking/theory; geometry; graphing

Language Arts: English Literature; Grammar Review; research methods and Projects

Science: Physics (mechanics); physiology; astronomy continued; inorganic chemistry; nutrition and reproductive systems; continuation of garden and nature studies

Music and Performing Arts: Singing and flute in parts; violin/cello; music theory

Art: clay modeling human hand and foot; woodworking; painting; perspective drawing; recreations of masters

World Language: One or two languages continued, reading and conversation

Handwork: Hand-sewn clothing; carving wooden bowls; metalwork

History & Social Studies: Renaissance, Reformation and Age of Exploration

Geography: World geography with an emphasis on Africa and Asia

Physical Education: Team sports, eurythmy

EIGHTH GRADE

Math: Practical applications of arithmetic; set concepts; algebra; platonic solid geometry

Language Arts: Journalism; writing short plays; Shakespearean drama

Science: Physics; organic chemistry; physiology; human anatomy, continuation of gardening and nature studies through ecology; astronomy; meteorology

Music and Performing Arts: Singing and flute in parts; violin/cello; symphonic form; American Music

Art: Black and white drawing; painting; perspective drawing

World Language: One or two languages continued, dialogue and original writing

Handwork: Machine sewing of original garments; bookbinding; soapstone carving; clay sculpture; woodcarving; metalwork

History & Social Studies: World trade and economics; American history; Modern History

Geography: World geography; Asia and other culturally diverse regions around the world.

Technology: Computers skills and use are a part of the Main Lesson

Physical Education: Team sports, eurythmy

NINTH GRADE

Math: Algebra 1: combinations, permutations, variations, algebraic equations, binomial theorem, quadratic equations, systems of exchange, Euclidean geometry, begin typing on a computer keyboard

Language Arts: Comedy and tragedy as expressed in drama and the short story; Shakespeare through the Romantics, longer essays on themes from eighth grade history, introduction to shorthand, biography, mythology, grammar review, short story writing, poetry: ballads, summarization

Science: organic chemistry, physiology: homeostasis, immunology; physics: principles of power engines, electricity, magnetism, Doppler effect; Earth sciences: weather, climate, erosion, mineralogy

Music and Performing Arts: mixed choir and orchestra, individual and group recorder, musical literature of the past and present,

Art: Euclidian geometry, charcoal drawing and descriptive geometry with drawing board and set squares, black-and-white drawing and construction, calligraphy, colors on objects, the interplay of light and mood in landscape

World Language: one or two languages continued, reading and conversation in language(s), recapitulation of grammar

Handwork: sewing, spinning, embroidery, designing book covers, basketry, pottery, gardening, copper work; woodworking

History and Social Studies: modern history with emphasis on Europe and dealing with the inner historical motives of the political, social, and industrial revolutions from the late eighteenth century to present ; the great inventions

Geography: structure of the Earth's mountains, meteorology, mineralogy, plate tectonics – the new geology

Physical Education: gymnastics with apparatus: horse, parallel bars, ropes, high bar and rings; circus: juggling, balancing, tumbling; eurythmy

TENTH GRADE

Math: Algebra II; logarithms; plane trigonometry; land surveying; Euclidean, coordinate, and projective geometry

Language Arts: dramatic literature: the novel (Edda, Beowulf, Nibelungenlied, and Gudrun sagas), alliterative endings and sequels; creative writing: comparisons, short story writing, essays dealing with literature; research paper on a pre-Christian theme, history of language, epic poetry, speech exercises, study of meter and poetic diction

Science: chemistry – properties of metals, chemical reactions; physiology – embryology, organs and their functions; physics – mechanics; earth sciences – oceanography, ecology, crystallography, limestone cycle

Music and Performing Arts: mixed choir and orchestra; individual and group recorder; musical literature of the past and present

Art: drawing – simple interpenetrations; Euclidian, coordinate, and projective geometry; complementary colors, wet and dry paper,

World Language: one or two languages continued, reading and conversation in language(s), poetical literature and style

Handwork: metal working, weaving, dying, textiles, basketry, enamel work, pottery, stained glass work, gardening; woodworking

History and Social Studies: ancient history: the earliest Indian, Persian, and Egyptian history up to the decline of the freedom of the Grecian states under Alexander the Great

Geography: Earth explored structurally and physically as a whole

Physical Education: circus; Bothmer Gymnastics: tumbling and experience of the vertical; consciousness of height – headstands, cartwheels, rolls, flips; eurythmy

ELEVENTH GRADE

Math: Algebra III: logarithms, exponential equations, practical problems, spherical trigonometry, projective geometry, including mathematical astronomy and nautical triangles; computer math, programming; logic boards; Boolean algebra, logic tables, building small computers using bread boards

Language Arts: contrast is the theme of the year: outline/categorize; compare/contrast: Dante and Chaucer, Shakespeare, Mediaeval romance, Parsifal and the other Grail legends, story writing with contrast and analysis, essay writing from reading, dramatic poetry, research paper on a medieval topic

Science: chemistry – atomic theory; physiology – comparative between plants and animals, study of the common denominator of life; physics – electricity and magnetism; botany – structure of cells to monocotyledons and dicotyledons

Music and Performing Arts: individual and group recorder; mixed choir and orchestra; history of music – understanding of the aesthetics of music: keys, intervals, etc.

Art: drawing the human form, landscape, and projective geometry; painting – copying the masters in various media

World Language: dramatic readings; scenes from plays; classical drama; prose readings in the one or two languages studied up to this point

Handwork: batik, sewing, weaving, spinning, dying; bookbinding – boxes or simple books; blacksmithing, basketry, pottery, copper work, gardening, photography; woodworking

History and Social Studies: Roman, Medieval, and Renaissance history

Geography: Continue with study of Earth as a whole; Mercator projections and land surveying

Physical Education: circus; sports – eurythmy; rack, volleyball, basketball, softball, soccer, etc.

TWELFTH GRADE

Math: algebra and geometry are brought together – analytical geometry, statistics, probability, number theory, golden section, computer mathematics, and differential and integral calculus; programming logic; building simple computers

Language Arts: the Transcendentalists – Emerson, Hawthorne, Thoreau, and Whitman; modern literature – Goethe's Faust, Ibsen, Nietzsche or Hesse; Russian literature, great figures in literature, long research essay, lyric poetry, creative writing that synthesizes

Science: chemistry – the chemical process in humans; biochemistry; industrial chemistry; medical chemistry; physics – optics, photometry, mirrors, light, color, polarization, etc; zoology – thread all the realms of nature together

Music and Performing Arts: continued individual and group recorder; mixed choir and orchestra; history of music – understanding of the aesthetics of music: keys, intervals, etc.

Art: descriptive geometry as applied to practical problems of architecture; individual creation building on previous years' study of the masters

World Language: continued dramatic readings; scenes from plays; classical drama; prose readings in the one or two languages studied up to this point; survey of speech and cultural development of language; modern literature in languages studied

Handwork: batik, weaving, spinning, dying; bookbinding – gilding and marbling books, leatherwork – wallets, shoes, etc.; blacksmithing; jewelry making; pottery; gardening; basketry; woodworking

History and Social Studies: modern and world history survey; looking at history from our present perspective; communism, fascism, threefold order, etc.

Geography: continue with study of Earth as a whole; world geography and mapmaking

Physical Education: eurythmy; circus – help teach skills to younger children; drivers education for students sixteen years and older

Throughout All Grades:

Drama: Beginning in grade one or two, students present an annual production which is age appropriate, continuing through high school

Eurythmy: Students practice gestures and movement with speech and music exercises, progressing in complexity and challenge throughout all grade levels

APPENDIX A-2 WALDORF INSPIRED CURRICULUM SCOPE AND SEQUENCE WITH BENCHMARKS GRADES K THROUGH EIGHT

Under separate cover

APPENDIX B: GOVERNING DOCUMENTS FOR TAOS MOUNTAIN CHARTER SCHOOL

Taos Mountain Charter 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, approving all major educational and operational policies, and selecting and evaluating the Director.

APPENDIX C: HEAD ADMINISTRATOR JOB DESCRIPTION

Job Description – School Director

Taos Mountain Charter School will employ a Director who holds appropriate credentials and/or degrees, and/or has demonstrated abilities in administering a school or related management/administration experience. The Director must be passionate about the goals and objectives of TMCS. There is a preference for charter school, Waldorf methods experience in management or administration. The Director is accountable to the Governing Council for all aspects of the schools operations, including enrollment,

education programs, community relations, fiscal management, personnel management and property management. These responsibilities should be carried out in a manner consistent with the school's Mission and vision, and in the best interest of TMCS. The Director will delegate responsibilities, provide appropriate leadership, and work with the Governing Council, staff, parents, and community to effectively achieve the school's goals and objectives.

Requirements:

- Understanding of and alignment with Waldorf educational approach
- Strong commitment to healthy, compassionate communication
- Ability to create written materials for all aspects of school functioning
- Willingness to work in a collegial manner with all school constituencies
- Office skills: word processing, Quickbooks, printer/fax, phone systems
- Ability to create, manage, and effectively communicate budgets
- Strong foundation in working with volunteers

Primary Responsibilities:

- Develop a long-range plan for school health in coordination with Governing Council, School Advisory Council and faculty
- Work closely with College, Faculty, and other school bodies to create and carry out specific plans for school health and development
- Attend Faculty, College, Parent Council, Governing Council, School Advisory Council and All-School meetings with a participatory focus
- Develop and update enrollment and marketing materials as needed
- Work with external service agencies as needed to support individual family and student needs
- Team effectively with Business Manager and Governing Council to ensure transparent, effective financial reporting for school
- Recruit, train, and oversee Parent Involvement on school Committees including Building/Grounds Committee, Fundraising Committee, and Festivals Committee
- Actively coordinate and participate in outreach activities

Reporting Structure:

This position reports to the Governing Council.

APPENDIX D: JOB DESCRIPTIONS OF LISCENCED AND CERTIFIED STAFF

DIRECTOR

Taos Mountain Charter School will employ a Director who holds appropriate credentials and/or degrees, and/or has demonstrated abilities in administering a school or related management/administration experience. As well, the Director must be passionate about the goals and objectives of TMCS. There is a preference for charter school, Waldorf methods experience in management or administration. The Director is accountable to the Governing Council for all aspects of the schools operations, including enrollment, education programs, community relations, fiscal management, personnel management and property management. These responsibilities should be carried out in a manner consistent with the school's Mission and vision, and in the best interest of TMCS. The Director will delegate responsibilities, provide appropriate leadership, and work with the Governing Council, staff, parents, and community to effectively achieve the school's goals and objectives.

Curriculum Specialist

The Curriculum Specialist will serve as the Chair of the College of Teachers. The Curriculum Specialist must have served on a Waldorf-inspired faculty for at least one year. In concert with the Director, this teacher/Curriculum Leader will have the responsibility to be a leader of the TMCS team of educators, guiding professional growth and improvement, and centering on individual and team growth, and the best practices of Waldorf education. In addition, this Learning Leader will serve as the school's expert on Waldorf-inspired curriculum and Waldorf-methods teaching, and will also serve as a primary mentor to class teachers, and an advisor to the Director and Governing Council regarding Waldorf-methods curriculum.

Director of Student Support

The Director of Student Support must have a background in Special Education and a familiarity with social work and support services. They must be familiar with a Waldorf-inspired therapeutic support approach. They must also have a strong background in New Mexico State Standards. The role of special educator at TMCS is a dynamic position. They must be familiar with Waldorf-inspired education and have a New Mexico Certification in Special Education. The Director of Student Support will work as part of a consensus driven, teacher led, and collaborative team. In addition to special education duties, special educators are expected to take on leadership roles, attend frequent staff meetings, assist in many aspects of curriculum design, and provide expertise. They will report directly to the Director.

Director of Community Outreach

The Director of Community Outreach is responsible for community outreach. One of the school's goals is to be an active member of the Taos community. The Outreach Specialist will coordinate with local organizations and facilitate student participation on projects in particular the Friday Service Days on the first and last Friday of the month. TMCS aspires to have our students be a contributing and valuable part of the larger community. The Director of Community Outreach will also work on networking to bring members of the Taos community into our school community. The Community Outreach Director will report to the Director.

TEACHING STAFF

The Director will be responsible for hiring, supervising, and evaluating teachers and instructional assistants.

K-12 LEAD CLASS TEACHER

A lead class teacher is hired as the primary teacher for each class. Each teacher will hold Waldorf certification or will enroll and complete a Waldorf Teacher Training program within five years of hire. The lead class teachers will hold appropriate state licensure as an educator or be enrolled in a New Mexico Alternative Licensure Program. The lead class teacher must be able to teach core academic subject areas which include mathematics, the arts (visual, drama, and music), language arts, science, history, social studies and geography.

Additional desired qualifications and training will be determined by the TMCS Governing Council with recommendation by the TMCS Director. TMCS will seek trained Waldorf teachers. As mentioned previously, faculty members will meet weekly to discuss the life of the school and its students, and in order to provide time for ongoing professional development. TMCS aims to represent the organizational model of a "Professional Learning Community," wherein faculty engages in peer mentorship, stimulating and motivating teachers to continually improve and develop their skills. This model also results in a high degree of self reflection, resulting in a school of engaged and mindful teachers.

In addition to their primary role as class teachers, the faculty ensures the quality of the educational program and maintains the highest possible standards in the conduct of the school's activities.

Faculty Duties:

1. Teach a Waldorf curriculum in alignment with the program of instruction, Mission and Methodologies of the school.

2. Integrate New Mexico State Common Core Standards into the curriculum in order to ensure that children are on track to proficiency each year.
3. Assess students for mastery of performance objectives and track student progress.
4. Keep accurate records of student progress and assessments toward meeting charter outcomes and State achievement targets.
5. Provide remediation and advanced learning opportunities for students using available classroom resources, volunteers, peers, and individualized programs.
6. Participate in school committees, development and implementation of IEPs, and Student Success Teams.
7. Attend trainings and continuing education classes related to the program of instruction.
8. Integrate teaching styles, philosophies, and methodologies outlined in the curricular emphasis into daily lessons.
9. Attend weekly the faculty meetings to participate in peer mentoring, child studies, New Mexico Common Core State Standards curriculum integration and planning of school-wide themes, special events.
10. Prepare lesson plans for teaching grade specific Main Lessons to students.

SUBJECT SPECIALIST TEACHERS

Our subject specialists may teach a variety of subjects, including, but not limited to, foreign languages, music, handwork, woodworking, games (PE), gardening, orchestra or strings, and eurythmy. Student assessments by subject specialists are included in the students' end-of-year narrative reports provided by the lead class teacher, as well as in the parent teacher conferences that are held twice per year.

APPENDIX E: GOVERNING BODY PERSONNEL POLICIES

Proposed Personnel Policies

Taos Mountain Charter School will develop an Employee 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.

LEGAL LIABILITY AND INSURANCE COVERAGE

Taos Mountain Charter 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. Taos Mountain Charter 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.

APPENDIX F: STUDENT DISCIPLINE POLICY

Proposed Student Discipline Procedures

The students discipline procedures will be written by the Director. The Governing Board will review the policies to have them ready for staff review. All policies will be in compliance with all federal and state requirements. The policy will follow the principles outlined in our charter application.

APPENDIX G-1: CONFLICT OF INTEREST

Proposed Conflict of Interest Policy

Article I

1. The purpose of this Board conflict of interest policy is to protect the organization's interests when it is contemplating entering into a transaction or arrangement that might benefit the private interests of an employee, board member, or faculty member might result in a possible excess benefit transaction.
2. This policy is intended to supplement, but not replace, any applicable state and federal laws governing conflicts of interest applicable to nonprofit and charitable organizations.

Article II -- Definitions

1. **Interested person** -- Any director, principal officer, or member of a committee with governing board delegated powers, who has a direct or indirect financial interest, as defined below, is an interested person.
2. **Financial interest** -- A person has a financial interest if the person has, directly or indirectly, through business, investment, or family:
 - a. An ownership or investment interest in any entity with which the organization has a transaction or arrangement,
 - b. A compensation arrangement with MNA or with any entity or individual with which the organization has a transaction or arrangement, or

c. A potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which the organization is negotiating a transaction or arrangement.

insubstantial. A financial interest is not necessarily a conflict of interest. A person who has a financial interest may have a conflict of interest only if the Board or Executive Committee decides that a conflict of interest exists, in accordance with this policy.

3. Independent Director -- A director shall be considered "independent" for the purposes of this policy if he or she is "independent" as defined in the instructions for the IRS 990 form or, until such definition is available, the director --

a. is not, and has not been for a period of at least three years, an employee of the organization or any entity in which the organization has a financial interest;

b. does not directly or indirectly have a significant business relationship with the organization, which might affect independence in decision-making;

c. is not employed as an executive of another corporation where any of the organization's executive officers or employees serve on that corporation's compensation committee; and

d. does not have an immediate family member who is an executive officer or employee the organization or who holds a position that has a significant financial relationship with the organization.

Article III -- Procedures

1. Duty to Disclose -- In connection with any actual or possible conflict of interest, an interested person must disclose the existence of the financial interest and be given the opportunity to disclose all material facts to the Board or Executive Committee.

2. Recusal of Self -- Any director may recuse him or herself at any time from involvement in any decision or discussion in which the director believes he or she has or may have a conflict of interest, without going through the process for determining whether a conflict of interest exists.

3. Determining Whether a Conflict of Interest Exists -- After disclosure of the financial interest and all material facts, and after any discussion with the interested person, he/she shall leave the Board or Executive Committee meeting while the determination of a conflict of interest is discussed and voted upon. The remaining Board or Executive Committee members shall decide if a conflict of interest exists.

4. Procedures for Addressing the Conflict of Interest

- a. An interested person may make a presentation at the Board or Executive Committee meeting, but after the presentation, he/she shall leave the meeting during the discussion of, and the vote on, the transaction or arrangement involving the possible conflict of interest.
- b. The Chairperson of the Board or Executive Committee shall, if appropriate, appoint a disinterested person or committee to investigate alternatives to the proposed transaction or arrangement.
- c. After exercising due diligence, the Board or Executive Committee shall determine whether MNA can obtain with reasonable efforts a more advantageous transaction or arrangement from a person or entity that would not give rise to a conflict of interest.
- d. If a more advantageous transaction or arrangement is not reasonably possible under circumstances not producing a conflict of interest, the Board or Executive Committee shall determine by a majority vote of the disinterested directors whether the transaction or arrangement is in MNA's best interest, for its own benefit, and whether it is fair and reasonable. In conformity with the above determination, it shall make its decision as to whether to enter into the transaction or arrangement.

5. Violations of the Conflicts of Interest Policy

- a. If the Board or Executive Committee has reasonable cause to believe a member has failed to disclose actual or possible conflicts of interest, it shall inform the member of the basis for such belief and afford the member an opportunity to explain the alleged failure to disclose.
- b. If, after hearing the member's response and after making further investigation as warranted by the circumstances, the Board or Executive Committee determines the member has failed to disclose an actual or possible conflict of interest, it shall take appropriate disciplinary and corrective action.

Article IV – Records of Proceedings The minutes of the Board and all committees with board delegated powers shall contain:

- a. The names of the persons who disclosed or otherwise were found to have a financial interest in connection with an actual or possible conflict of interest, the nature of the financial interest, any action taken to determine whether a conflict of interest was present, and the Board's or Executive Committee's decision as to whether a conflict of interest in fact existed.
- b. The names of the persons who were present for discussions and votes relating to the transaction or arrangement, the content of the discussion, including any alternatives to

the proposed transaction or arrangement, and a record of any votes taken in connection with the proceedings.

Article V – Compensation

a. A voting member of the Board who receives compensation, directly or indirectly, from MNA for services is precluded from voting on matters pertaining to that member's compensation.

b. A voting member of any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from MNA for services is precluded from voting on matters pertaining to that member's compensation.

c. No voting member of the Board or any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from MNA, either individually or collectively, is prohibited from providing information to any committee regarding compensation.

Article VI – Annual Statements

1. Each director, principal officer and member of a committee with Board delegated powers shall annually sign a statement which affirms such person:

a. Has received a copy of the conflict of interest policy,

b. Has read and understands the policy,

c. Has agreed to comply with the policy, and

d. Understands MNA is charitable and in order to maintain its federal tax exemption it must engage primarily in activities which accomplish one or more of its tax-exempt purposes.

2. Each voting member of the Board shall annually sign a statement which declares whether such person is an independent director.

3. If at any time during the year, the information in the annual statement changes materially, the director shall disclose such changes and revise the annual disclosure form.

4. The Executive Committee shall regularly and consistently monitor and enforce compliance with this policy by reviewing annual statements and taking such other actions as are necessary for effective oversight.

Article VII – Periodic Reviews To ensure MNA operates in a manner consistent with charitable purposes and does not engage in activities that could jeopardize its tax-exempt status, periodic reviews shall be conducted. The periodic reviews shall, at a minimum, include the following subjects:

a. Whether compensation arrangements and benefits are reasonable, based on competent survey information (if reasonably available), and the result of arm's length bargaining.

b. Whether partnerships, joint ventures, and arrangements with management organizations, if any, conform to MNA's written policies, are properly recorded, reflect reasonable investment or payments for goods and services, further charitable purposes and do not result in inurement or impermissible private benefit or in an excess benefit transaction.

Article VIII – Use of Outside Experts When conducting the periodic reviews as provided for in Article VII, MNA may, but need not, use outside advisors. If outside experts are used, their use shall not relieve the Board of its responsibility for ensuring periodic reviews are conducted.

APPENDIX G-2: SAMPLE DISCLOSURE STATEMENT

Taos Mountain Charter School CONFLICT OF INTEREST DISCLOSURE STATEMENT

Preliminary note: In order to be more comprehensive, this statement of disclosure/questionnaire also requires you to provide information with respect to certain parties that are related to you.

These persons are termed “affiliated persons” and include the following:

- a. your spouse, domestic partner, child, mother, father, brother or sister;
- b. any corporation or organization of which you are a board member, an officer, a partner, participate in management or are employed by, or are, directly or indirectly, a debt holder or the beneficial owner of any class of equity securities; and
- c. any trust or other estate in which you have a substantial beneficial interest or as to which you serve as a trustee or in a similar capacity.

1. NAME OF EMPLOYEE OR BOARD MEMBER: (Please print)

2. CAPACITY: _____ board of directors

_____ executive committee

_____ officer

_____ committee member

_____ staff (position): _____

3. Have you or any of your affiliated persons provided services or property to _____ in the past year?

_____ YES _____ NO

If yes, please describe the nature of the services or property and if an affiliated person is involved, the identity of the affiliated person and your relationship with that person:

4. Have you or any of your affiliated persons purchased services or property from _____ i. Have you or any of your affiliated persons purchased services or property from _____ in the past year?
____ YES ____ NO

If yes, please describe the purchased services or property and if an affiliated person is involved, the identity of the affiliated person and your relationship with that person:

5. Please indicate whether you or any of your affiliated persons had any direct or indirect interest in any business transaction(s) in the past year to which _____ was or is a party?
____ YES ____ NO

If yes, describe the transaction(s) and if an affiliated person is involved, the identity of the affiliated person and your relationship with that person:

6. Were you or any of your affiliated persons indebted to pay money to _____ at any time in the past year (other than travel advances or the like)?
____ YES ____ NO

If yes, please describe the indebtedness and if an affiliated person is involved, the identity of the affiliated person and your relationship with that person:

7. In the past year, did you or any of your affiliated persons receive, or become entitled to receive, directly or indirectly, any personal benefits from _____ or as a result of your relationship with _____, that in the aggregate could be valued in excess of \$1,000, that were not or will not be compensation directly related to your duties to _____?
____ YES ____ NO

If yes, please describe the benefit(s) and if an affiliated person is involved, the identity of the affiliated person and your relationship with that person:

8. Are you or any of your affiliated persons a party to or have an interest in any pending legal proceedings involving _____?

_____YES _____NO

If yes, please describe the proceeding(s) and if an affiliated person is involved, the identity of the affiliated person and your relationship with that person:

9. Are you aware of any other events, transactions, arrangements or other situations that have occurred or may occur in the future that you believe should be examined by Taos Mountain Charter School's board or a duly constituted committee thereof in accordance with the terms and intent of Taos Mountain Charter School's conflict of interest policy?

_____YES _____NO

If yes, please describe the situation(s) and if an affiliated person is involved, the identity of the affiliated person and your relationship with that person:

I HERBY CONFIRM that I have read and understand Taos Mountain Charter School's conflict of interest policy and that my responses to the above questions are complete and correct to the best of my information and belief. I agree that if I become aware of any information that might indicate that this disclosure is inaccurate or that I have not complied with this policy, I will notify Taos Mountain Charter School Board of Trustees immediately.

APPENDIX H

Not applicable

APPENDIX I: PSFA Project Facility Documentation

Under separate cover

APPENDIX J: 910 B5 SEG Computation Revenue Estimate

(Under separate cover)

APPENDIX K: Five Year Budget Plan

(Under separate cover)

APPENDIX L: Proposed Salary Schedule for Licensed Staff

(Under separate cover)

SUPPLEMENTARY APPENDICES

APPENDIX M: ASSESSMENT TOOLS and ALIGNMENT OF CURRICULUM

M-1: Whole-Child Rubric (Grades 1-8) (Under separate cover)

M-2: Waldorf Mathematic Standards and Rubric, Grades 1-5 (Under separate cover)

M-3: Waldorf Language Arts Standards and Rubric, Grades 1-5 (Under separate cover)

M-4: Elements of a Waldorf School Second Grade Assessment (Under separate cover)

APPENDIX N: COMPASSIONATE COMMUNICATION: JOHN CUNNIGHAM (Under separate cover)

APPENDIX O: Ida Oberman: Learning from Steiner: The Relevance of Waldorf for Urban Public Education, 2007 (Under separate cover)

APPENDIX P: LETTER OF INTENT (Under separate cover)

**Waldorf-inspired Curriculum Scope and Sequence with Benchmarks-
Grades K-8**

Curriculum Appendix I – Student Scope and Sequence with Benchmarks

Kindergarten

The four major components of the kindergarten curriculum are:

1. Circle

This is the formal learning period. Through activities such as singing, finger plays, and movement games, the children acquire gross and fine-motor skills, memorization skills, and the ability to follow directions and awareness of a sequence of events. Materials from around the world are utilized.

2. Indoor Activity

The environment of the kindergarten includes baskets of manipulative objects, baskets of clothes, craft materials, work materials, modeling beeswax, blocks, and building materials. During indoor play, the children sort and compare, count and order these objects. They recognize shapes in building geometric designs. Using modeling beeswax, the children create geometric and free-form shapes. Through craft skills, the children learn to count and recognize patterns. Using arts and crafts materials, costumes, and props, the children draw and tell narratives, stories, and messages.

3. Outdoor Activity

Physical activity is paramount in early childhood and at this time gross motor development is critical. Children have many early science encounters during outdoor playtime, such as learning about the weather and the seasons. Elementary physics is experienced through the seesaw, lever systems, and swings and balance beams, which are some of the outdoor materials. The children also learn the importance of work as they participate in seasonal outdoor projects such as gardening and building.

4. Storytelling

Hearing stories is fundamental to developing the capacities for reading and writing. Pre-reading skills such as reflective thought, memory and attention are learned from the daily experience of hearing and retelling stories. Puppetry and dramatic play are also used in storytelling. By using stories from many cultures, children receive an introduction to the cultural diversity that surrounds them.

5. Snack

The children help prepare a healthy, homemade snack each day, including soups, grains, and baking bread. In helping to prepare the snack each day the children learn about foods, measurement, estimation, and following directions. These pre-math and science skills, learned in a practical experiential fashion, are the foundation for conceptual learning. While eating together, the children develop social skills such as manners, taking turns and cleaning up. Snack is time for conversation when language skills are also cultivated. Overall, snack time creates a social context in which students experience community and a care and respect for one another.

Grades

1. Grade One

A. Language Arts:

1. Reading. The students will be able to read texts that they have developed and created in their main lesson books. The child's growing literary experience is given a firm foundation through the Waldorf tradition of storytelling. Storytelling provides an early understanding of plot and character development, ability to predict events and to sequence a series of events from a reading selection.

2. Writing. Form drawing, practicing specific patterns of lines and curves, creates the eye-hand coordination necessary for good penmanship. By the end of the year, the children will be able to produce four to five correctly spaced lines of block capital printing on a page in the main lesson book using paper and pencil.

3. Speech and Drama. By the end of the year, the children will be able to articulate clearly and distinguish individual vowels and consonants in their recitation of a poem with 15-20 lines. They will participate in the class play.

B. Mathematics. The children will be able to count past 100. They will make a model to represent a given whole number, identify a whole number represented by a model with a word name and symbol, and construct equivalent forms of whole numbers (e.g., $15 + 5 = 10 + 10$). The children will be able to create a pattern using a model (e.g., symbolically: numbers or letters; visually: shapes, designs, numbers or pictures; auditorally: clapping, singing or listening; and kinessthetically: dancing, movement or tactile), and communicate orally or in written form the repetition of objects in a pattern. The students will identify the pattern in skip counting and determine the next number in a skip counting pattern. Children will identify two-dimensional shapes by name and attribute and draw two-dimensional shapes.

Four processes: The children will have worked with all four processes (with numbers up to 24) in relation to objects, (beans, shells, and so forth). The students will draw pictures and numbers in their main lesson books using the processes, horizontally.

Multiplication: The children will use single-digit multipliers involving sums no greater than 24. The children will recite 2, 3, 5, and 10 tables in order by rote. The children will recognize odd and even numbers up to 24. The children will be able to do mental arithmetic utilizing number stories and mental pictures. They will be able to draw and recognize circles, squares, and triangles.

C. Science. The children will study nature from stories told in an imaginative manner.

D. Social Studies. The children will experience the culture of the foreign language. Social studies will also be included through fairy and folk tales from around the world.

E. Music. The children will be able to match the correct notes while being led by the teacher. They will be able to play simple tunes on the pentatonic flute by watching the teacher's fingering. They will be able to play four songs by memory.

F. Drawing, Painting and Handwork. The children will be able to fill a page with flat shading using block crayons. Handwork lessons begin in the first grade. First graders learn to knit which enhances fine motor activity, fosters concentration, hand-eye coordination and development of math skills.

G. Foreign Language. Foreign language instruction is introduced in the first grade with a language

teacher. Integrated into songs, stories, poems and directions, the children easily gain command of another language through this kind of early exposure.

2. Grade Two

A. Language Arts.

1. Reading. The class will be able to read any self-developed main lesson work or the same material in a book. At least half of the class will be able to read simple readers, such as *Frog and Toad*, *The Big Jump* or the large Caldicott Aesop. The children will use reading comprehension strategies such as drawing conclusions, summarizing, making predictions, and identifying cause and effect. The children will be able to distinguish between short and long vowels, blends and diphthongs, as well as decode words in context using beginning, middle, and final letter/sound relationships.

2. Writing. The children will be able to write and recognize lower case printing by mid-year. They will be able to spell high frequency words correctly, punctuate endings of sentences, and capitalize sentence beginnings and proper nouns. Correct grammar is learned by practice and example.

3. Speech and Drama. They will correctly recite poems of at least 20 lines and recall stories that they have been told. Children will participate in the class play.

B. Mathematics.

The children will calculate up to the 100s place. They will read and write whole numbers up to one thousand. They will be able to construct a model to represent place value concepts, and read aloud a whole number with correct place value words (e.g., a student will read 521 as "five hundred twenty-one"). The students will add and subtract two three-digit whole numbers. The children will perform single-digit multiplication.

Reciting orally as a class, the children will be able to say the multiplication tables in sequence up to the 12 table; about one-quarter will recite the tables independently. They will perform single-digit division. With the teacher using practical applications in story form involving more than one process, the children will be able to do mental arithmetic. They will identify a given model that is divided into equal fractional parts (halves, thirds, and fourths). The children will be able to formulate mathematical problems from everyday situations.

Through form drawing activities, the children learn to inwardly visualize shapes and patterns. They will compare attributes of two-dimensional shapes, predict how shapes can be changed by combining or dividing them, and build geometric shapes with other common shapes (e.g., tangrams, pattern blocks, and geoboards). They move the shapes with their body in space, and they sing and clap the patterns. Through rhythmic counting games and rhymes, the children learn the 2, 3, 4, 5, and 10s tables. They will communicate orally or in written form a given pattern occurring in a sequence of numbers (e.g., counting by 10s, 5s, 3s, 2s, odd, even, forward, and backward), and extend patterns using a model.

C. Science. The children will study nature, names of animals, family, body, food, colors, seasons, months of the year, through imaginative stories and observation.

D. Social Studies, History, Geography. The children will hear fables; aesop and celtic local folklore, and Native American stories. They will observe and discuss local plants, animals, land, mountains and rivers, Weather changes, sun positions at different times of day and year, examples of mineral, plants and animals will be brought into the classroom.

E. Music. Voice-tone-ear training. The children will sing in unison, learn to play pentatonic recorders in simple rounds. They will begin to learn about notes, signs, scales, keys and play with both hands on the recorder.

F. Drawing, Painting, and Handwork. The children will draw, paint and model simple and more complicated forms using block and stick crayons, primary and secondary colors on wet paper to paint, and beeswax to model. They will knit and purl small projects and animals and sew costumes for the school play.

G. Foreign Language. The children will learn songs, games, poems, plays, and conversations by ear. They will imitate the teacher, speak of seasons, months, colors, days of the week, animal stories, counting and speech exercises.

3. Grade Three

A. Language Arts

1. Reading: The children will read fluently in school curriculum grade-level material; for example, the stories by Laura Ingalls Wilder, *And It Came To Pass*. Children in third grade will be reading independently, at or above grade level. The children will use word recognition and decoding strategies such as phonetic skills, context clues, picture clues, word order, prefixes, and suffixes to comprehend written selections. They will identify facts and the main idea, define and differentiate characters, and determine an author's purpose in a range of traditional and contemporary literature. The children will understand the structural elements of poetry, including rhyme, rhythm, and repetition. They will be able to follow a list of instructions and evaluate those instructions for clarity.

2. Writing: Student writing can be read by an adult. Short original compositions will be written in logical form. Proper use of punctuation will begin. The children will write simple business letters, simple descriptions of what was seen, heard, or read, and write from oral dictation. Cursive writing will begin. The children will be able to produce a three-part paragraph introduction, build-up, and conclusion. The children will be able to recognize nouns, verbs, adjectives, and adverbs in prepared work. They will use standard, age-appropriate grammar and word usage (e.g., basic subject-word agreement, complete simple sentences, appropriate verb tense, and regular plurals).

3. Speech. Children will listen to stories and be able to retell them in an orderly sequence. Children will retell their own stories to the class and will recite poetry, both chorally and individually. Each child will play a character in a class play.

B. Mathematics: The children will exhibit a knowledge of relative measurement: linear, liquid, and dry. The class will be able to determine the characteristics (attributes) of an object that are measurable (e.g., length and weight are measurable; color and texture are not measurable) and identify the type of measure (e.g., weight, height, volume) for each attribute. The children will select the appropriate unit of measure for a given characteristic of an object such as length (inches, feet, and yards; centimeters and meters), capacity/volume (cups, gallons, and liters), and mass/weight (ounces, pounds, grams, and kilograms). Children will select the appropriate tool to measure the given characteristic of an object (e.g., ruler thermometer, measuring cup, scale), measure a given characteristic of an object using non-standard units of measure, and measure a given characteristic of an object using standard units of measure. The children will tell time to the nearest minute on digital and traditional (analog) clocks, and determine the passage of time (i.e., units of days, months, and years) using a calendar. They will compare units of measurement to determine more or less relationships (e.g., length, capacity, and time). The students will be able to estimate a measurement, compare the estimation to actual measure, and evaluate the reasonableness of the estimation.

The class will know the multiplication tables non-sequentially. The children will perform the tables rhythmically with the class. The class will be able to multiply two- and three-digit multipliers involving carrying. The children will be able to perform single-digit division. The children will be able to spell three-digit numbers as words. They will be able to make a model to represent a given fraction (e.g., geometric model--shading a picture, set

model—part of an egg carton) (halves, thirds, and fourths). The class will be able to identify the fraction represented by a model with a word name and symbol (halves, thirds, and fourths), order whole numbers (e.g., smallest to largest, largest to smallest) up to one thousand, and write a whole number in expanded notation (e.g., $531 = 500 + 30 + 1$). The children will be able to count money to \$5.00 using bills and coins. They will be able to describe in a given situation how a change in one variable results in the change of another (e.g., if you have to share a batch of cookies with friends, the more friends you have, the fewer cookies each will get).

The children will be able to identify three-dimensional figures by name and/or attribute, compare attributes of three-dimensional figures, and use a rectangular array to represent a multiplication fact (e.g., put 12 tiles in a rectangular array; make a 3×4 , 6×2 , and 12×1 array).

The children will learn basic geometric relationships such as parallelism, perpendicularity, and similarity through the design and construction of a playhouse. They will continue the study of number patterns through card games and magic squares.

C. Science. The children will learn biology and botany through the study of farming and gardening. They will learn cycles of the year, soils, animals, trace a seed to wheat, flour, bread. They will have a class garden, and understand the interrelatedness of nature: mineral needs plant to aerate it, animal needs plant to feed upon, man needs all of nature.

D. Social Studies, History, and Geography. Old Testament stories are presented as history, and Native American stories. The children will study housing from nomadic dwellings to modern homes, and if possible will build a structure.

E. Music. Voice, tone, ear training, singing in unison, learn notes and intervals. C-major scale, play parts on recorders, and other instruments if possible.

F. Drawing, Painting, and handwork. Using stick crayons and colored pencils the children will learn freehand geometric drawing, form drawing, and creative, dynamic drawing. They will paint from fantasy and main lesson themes, and study the interaction of the primary and secondary colors. They will model forms connected with main lesson stories from bee's wax and plastacine. In handwork the children will crochet animals and utilitarian objects such as tea cozies, purses, mats, and caps. They will learn simple embroidery.

G. Foreign Language. The children will learn songs, poems, names of animals, family members, parts of body, foods, season, colors, months, days, etc. They will be able to write short easy sentences to express complete thought.

4. Grade Four

A. Language Arts

1. Reading: Fourth grade children will be reading independently at or above curriculum grade-level books such as C. S. Lewis' *Chronicles of Narnia* and Mary Norton's *The Borrowers*. They will prepare oral book reports and read in connection with the main lesson material. They will have an introduction to the dictionary, alphabetical order, syllabication, accented and unaccented words, main ideas and their opposites, and have weekly library trips and much outside reading.

2. Writing: The children will be able to write short essays and compositions emphasizing a story, letters, and narrative descriptions including exposition and combinations. The children will be able to identify all parts of speech in a simple sentence, and complete a brief written assignment. They will recognize past, present and future verb forms. They will be able to write dictations after hearing sentences twice.

3. Speech: The children will be able to perform scenes from Norse myths after listening to the teacher's stories. They will be able to write dictations after hearing sentences twice. They will perform skits, participate in discussions and present oral book reports.

B. Mathematics.

The children will know the multiplication tables non- sequentially. They will be able to divide with two-digit divisors in whole number problems, multiply by three-digit multipliers, perform short division, and find prime numbers. They will add, subtract, multiply and divide fractions. They will find averages. The students will be able to compare units of measure to determine equivalent relationships (e.g., length, time, and money), and read a thermometer in Celsius and Fahrenheit to the nearest degree. Through work with clay, the children will model the Platonic geometric solids. Students will be able to classify two-dimensional shapes and three-dimensional figures by sight.

C. Science. The student will study zoology; head, trunk, and limbs of animals and the relationships to comparable part of man.

D. Social Studies, History, and Geography. The children will read Norse Sagas and Native America studies. A study of local history; why early settlers settled here, and the development of local natural resources will be examined. Students will know the main physical and political division and features of Arizona. They will study topography and map making

E. Music. The children will learn time values, harmonies, major and minor 3rd, rounds, canons, and read music from notation.

F. Drawing, Painting, & Handwork. The children will execute free hand geometric drawing and form drawing. They will be introduced to ink pens. In painting they will learn rhythm, pattern, texture, and value. They will begin cross stitch embroidery from their own designs. Also, clay modeling of animal forms and geometric shapes.

G. Foreign languages. The children will begin grammar, simple writing, and conjugations, oral dictations. They will participate in directed conversation, learn songs, games, poems and stories.

5. Grade Five

A. Language Arts.

1. Reading: The children will read fluently with expression and comprehension. The subject matter will include *The Golden Fleece*, *Tales of Ancient Egypt*, and *The Children's Homer*. The children will analyze selections of fiction, nonfiction, and poetry by identifying the plot line (i.e., beginning, conflict, rising action, climax, and resolution); distinguishing the main character from minor ones; describing the relationships between and motivations of characters; and making inferences about the events, setting, style, tone, mood, and meaning of the selection.

2. Writing. The children will use correct spelling, punctuation, capitalization, grammar and usage, along with varied sentence structure and paragraph organization to complete effectively a variety of writing tasks. They will be able to prepare essays and compositions that emphasize description, as well as oral and written book reports, and letters. Students will write compositions indicating geographical contrasts, keep notebooks in main lessons, and use dialogue, with correct punctuation, in compositions. The children will demonstrate research skills using reference materials such as a dictionary, encyclopedia, and thesaurus.

The children will be able to use active and passive voice in verbs, transitive and intransitive verbs, adverbs and conjunctions, direct and indirect speech, complete punctuation, and quotations. An emphasis will be placed on adjectives, phrase, clause, relative pronouns, synonyms, antonyms, homonyms, prefixes and suffixes from Latin and Greek, opposites in meaning, and shades of meaning. The children will practice parts of speech through usage, and know what part of speech a word or phrase or clause is.

3. Speech and Drama: The students will listen to historical events and retell biographies of historical figures in the first person. They will give extemporaneous and rehearsed speeches using new vocabulary words.

B. Mathematics: The children will learn Pythagorean theorem, decimals, metric system, ratio and proportion, mixed fractions, reciprocals, unitary method, and how to interrelate triangles, squares, circles, ellipses, etc. They will compare and order whole numbers, common fractions, and decimals, and represent whole numbers and decimals. The students will represent the process of multiplication as repeated addition using concrete or illustrative models using whole numbers. They will represent the process of division as repeated subtraction, partitioning a group and partitioning a whole using concrete or illustrative models using whole numbers. They will write the family of equations using inverse operations for a given set of numbers using whole numbers with addition/subtraction ($4 + 5 = 9$, $5 + 4 = 9$, $9 - 4 = 5$, $9 - 5 = 4$) and multiplication/division.

Students will demonstrate proficiency with the operations of multiplication and division of whole numbers, and state the factors for a given whole number. They will demonstrate the relationship and equivalency among decimals, fractions, and percents (e.g., $1/2 = .5 = 50\%$ with halves, fourths, and tenths).

The children will interpret and analyze data from graphical representations (e.g., bar graphs, line graphs, circle graphs, frequency tables, and Venn diagrams) and draw simple conclusions. They will extend simple geometric and number patterns (e.g., 1, 1, 2, 1, 1, 3, 1, 1, 4...), create simple geometric and number patterns, and describe a rule for a simple pattern (e.g., 5, 10, 15, 20... rule = add five or count by fives). Students will analyze functional relationships to explain how a change in one variable results in a change in another. They will graph given data points to represent a linear equation on a coordinate grid with whole numbers and compare quantities using ratios.

Students will be able to measure length, volume, and weight in both U.S. customary and metric units, and convert measurement units to equivalent units within a given system (customary and metric) (e.g., 12 inches = 1 foot, 10 decimeters = 1 meter). They will state the appropriate tool to measure in a particular situation (e.g., "What tool would you use to measure the top of your desk?") as well as the appropriate unit of measure (e.g., "What unit of measurement would you use to measure the top of your desk?"). They will estimate and use measures of distance, perimeter, and area.

The children will be able to visualize and draw two- and three-dimensional geometric figures with special attention to analyzing and reasoning informally about their properties (e.g., parallelism, perpendicularity, and congruence). They will be able to apply geometric properties and relationships such as congruence, similarity, angle measure, parallelism, and perpendicularity to real-world situations. They will draw or build a shape that has symmetry and solve problems using given formulas for simple area and perimeter.

C. Science. The children will study Zoology and how animals react to their environment. They will be able to divide the higher plants into monocots and dicots, understand the stages of plant growth, and be familiar with the major classifications of plants.

D. Social Studies, History and Geography. The children will read Greek Myths and stories of India, Persia, and Egypt as part of history. They will be familiar with the major political structures, geographical features, natural resources and cultural divisions of North America.

E. Music. Major and minor scales, two and three part songs, rounds and canons. Introduction to alto and tenor recorder. Ear training. Rhythmic activities include all meters and polyrhythms. Whole class will participate in orchestra.

F. Drawing, Painting and Handwork. The children will draw freehand geometrical forms. They will study Egypto-Babylonian style and use Egypto-Greek design to border their main lesson books. They will draw from what is seen as well as descriptions of character, manner, mood, time of day or night. They will paint from memory as well as fantasy. Clay modeling will be based on ancient Greek reliefs and vases. Watercolor, charcoal, pencil, clay and plaster will be used. Knitting will be done on four needles to create socks, gloves and mittens etc.

G. Foreign Language. Syntax, short simple compositions and oral translations. The children will read simple stories and create a notebook.

6. Grade Six

A. Language Arts

1. Reading. In addition to independent reading, students will read and report on assigned novels appropriate to the curriculum on a reading level equivalent to *Tom Sawyer*. The children will use reading strategies such as making inferences and predictions, summarizing, paraphrasing, differentiating fact from opinion, drawing conclusions, and determining the author's purpose and perspective to comprehend written selections.

2. Writing. The children will be capable of independent expository writing, properly spelled and punctuated. For example, after observing a physics demonstration, they will be able to make an accurate written description of their observations. The children will be able to construct an essay with the following types of paragraphs: introductory, expository/descriptive, and concluding. They will be able to write business letters with the proper form, and provide meaningful responses to requests, complaints, and so forth. They will be able to recognize the parts of speech and write complex sentences.

3. Speech and Drama. The students will listen to and engage in classroom debates. They will observe, listen to, and accurately describe science experiments. They will recite speeches based on historical events and heroic ballads.

B. Mathematics: The children will be able to calculate sales tax, simple bank interest, discount sales, unit pricing, and profit and loss. Compound interest will be presented. They will relate the basic arithmetic operations to one another, specifically fractions and decimals, and they will calculate multiplication/division using two-digit divisor, with remainders and rounding in context (e.g., percentages and money). The students will be able to factor a whole number into a product of its primes (i.e., prime factorization) and identify greatest common factor and least common multiples for a set of whole numbers. They will add, subtract, multiply, and divide integers, positive fractions, and decimals. Students will construct, read, analyze, and interpret tables, charts, graphs, and data plots (e.g., box and whisker, stem and leaf, and scatter plots). They will estimate, make, and use measurements (U.S. customary and metric) to describe and make comparisons. The children will be able to construct geometric drawings with compass and ruler. They will demonstrate the Pythagorean theorem related to a non-isosceles right triangle. They will identify the properties of geometric figures using appropriate terminology and vocabulary (e.g., parallelism, perpendicularity, and congruency) for three-dimensional figures (e.g., prisms) and draw or build three-dimensional figures by applying significant properties. The children will demonstrate the ability to do algebraic formulae, substitution of numbers in relation to distance, interest, and conversion of temperature from Celsius to Fahrenheit.

C. Science. The children will study physics, geology, mineralogy and astronomy. The children will identify the major constellations and describe the phases of the moon. They will be able to explain the reason for the seasons. They will be able to identify their location on earth by the constellations. The children will be able to demonstrate an understanding of the time zones.

D. Social Studies, History and Geography. The children will study Ancient Rome through the middle ages. They will be able to describe what it was like to be a Roman, what life in the Republic was like, and also what life was like in the Empire. They will describe the three stages of Roman history-kingdom, republic, and empire. They will describe what we have obtained from Rome. The students will demonstrate a knowledge of the time relationship between the Greeks, Hebrews and Egyptians. The children will study North and South America, Asia, and the earth's configuration.

E. Music. Descant, Alto and Tenor recorder, strings and winds.

F. Drawing, Painting and Handwork. The children will do exact geometric drawing and black and white drawing. They will begin painting landscapes using color contrasts, triads and full spectrum. The children will sew stuffed animals and start pattern making.

G. Foreign Languages. The children will be reading text, humorous stories and doing free translations.

7. Grade Seven

A. Language Arts

1. Reading: The children will read the following five books or five other equivalent books: *Story of the Grail*, *Otto of the Silver Hand*, *Joan of Arc*, *Prince and the Pauper*, *The Light in the Forest*. They will produce an oral and/or written report on these books and will be able to summarize a text in chronological, sequential, or logical order. The students will describe the motivation of major and minor characters in a selection and draw conclusions based on stated and implied information according to style, meaning, and mood.

2. Writing. The children will be able to write poems that are expressive with a good grasp and usage of imagery on a presented topic. Students will identify forms of poetry. In compositions they will demonstrate the three types of paragraphs (introductory, descriptive/expository, concluding). They will write longer essays, research papers, and business letters. The students will be able to punctuate correctly (e.g., sentence endings, commas in a friendly letter's greeting and closing, commas in a series, abbreviations, quotations in dialogue, and apostrophe), apply rules of capitalization (e.g., sentence beginnings, titles, abbreviations, and proper nouns), apply standard grammar and usage (e.g., subject-verb agreement, simple and compound sentences, appropriate verb tense, and plurals), and organize paragraphs with a variety of sentence structures (e.g., simple and compound).

Eighty percent will take dictation of three paragraphs, single spaced, with no more than ten errors. Fifteen percent will make up to 20 errors.

3. Speech and Drama. Students will actively solve classroom problems through responsive listening, discussion and debate. They will listen to science experiments, reports and historical events and accurately retell them. They will present epic poems chorally, give reports, present original skits and plays from historical events.

B. Mathematics. Students will be able to solve problems with powers and roots. They will perform compound interest calculations. They will represent place value using concrete or illustrative models using rational numbers (millions to millionths) and read and write whole numbers, integers, common fractions, and decimals using real-world situations. Students will develop and apply number theory concepts (e.g., primes, factors, and multiples) to represent numbers in various ways. They will be able to determine the square root of a perfect square and choose an appropriate graphic format to organize and represent data.

The children will be able to solve for perimeter and area of a triangle, circle, and rectangle, demonstrate an understanding of the Pythagorean theorem, and knowledge of the laws of perspective. They will construct and analyze simple geometric forms. Students will represent and solve problems relating to size, shape, area, and volume using geometric models, and draw or build a variety of shapes having the same perimeter and area. They will record estimates and measurements for distance, distance in scale drawings, perimeter, circumference, area, volume, weight, and mass. They will describe the effect on perimeter, area, and volume when one dimension is altered.

The children will learn to identify and define positive and negative numbers, solve simple algebraic equations, and use the formulae related to problems in physics. They will produce graphs using simple equations and translate a written phrase to an algebraic expression and vice versa (words to symbols and symbols to words) (e.g., the quotient of x and y). Students will use patterns and functions to represent and solve problems both formally and informally (e.g., measuring the height a ball bounces by dropping different balls from different heights).

C. Science. Using physics principles the children will identify the transformations of motion and the classes of levers. Using principles of chemistry the children will be able to describe the combustion process, distinguish bases from acids, and describe limestone, oxidation, and reduction. The children will learn to name the food groups and define substance abuse. They will demonstrate a basic knowledge of simple anatomy. They will define the transformation of substance to energy.

D. Social Studies, History and Geography: The children will produce an essay on the daily life of people who lived in the period from 1400-1700, the age of exploration, the reformation and the renaissance.. They will demonstrate a familiarity with the lives of certain people of the Renaissance: Savonarola, the Di Medici's, and others.

E. Music. Boys/Girls choir. There will be a junior high school orchestra.

F. Drawing, Painting, and Handwork. The children will learn perspective drawing and volumetric drawing. They will continue painting wet and dry with transparent colors. They will sew, embroider and quilt. They will sculpt the human hand, foot, and bones etc. in clay.

G. Foreign Language. Reading, conversing, grammar, and structure.

8. Grade Eight

A. Language Arts

1. Reading: The students will have read the following or equivalent books: *The Good Earth*, *The Scarlet Pimpernel*, *Call of the Wild*, *Diary of Anne Frank*, and *The World of Captain John Smith*. They will be able to confirm meaning of figurative, idiomatic, and technical language using context clues, predict the outcome of a text, summarize a text in their own words, compare and contrast a text (e.g. characters, genre, cultural difference, fact and fiction), and determine cause-and-effect relationships.

2. Writing: Students will produce newspaper reports, business and practical compositions, and an original drama. They will write a personal experience narrative that develops a story line in a sequence that is clear and uses figurative language and descriptive words and phrases. Students will write a report in their own words that states, develops, and provides a concluding statement for a point of view (perspective) about a topic that is narrow enough to be adequately covered. They will use logical sequence (including transitional words and phrases such as first, next, and then) and provide support through facts, details, examples or descriptions that are appropriate, directly related to the topic, and from a variety of cited sources.

3. Speech and Drama: Students will debate and discuss historical events, current issues, and classroom issues. They will accurately retell and/or dramatize stories and experiments.

B. Mathematics: The children will be able to solve problems in percentages, signed numbers, and mensuration. They will represent and use numbers in equivalent forms (integers, fractions, percent, decimals, exponents, scientific notation, and square roots). The children will solve algebraic equations and explain number bases and set concepts. They will describe the concepts of variables, expressions, equations, and inequalities, and develop, analyze, and explain methods for solving proportions. Students will communicate how to solve

problems involving ratios, proportions, and percents using concrete and illustrative models. They will design a method with a series of defined steps for solving a problem, and justify the method using fractions, decimals, and integers. Students will develop a procedure or formula to calculate area and perimeter of simple polygons, area of polygons and circles, surface area of rectangular prisms, and volume of rectangular prisms. They will use given formulas to find area and perimeter of simple polygons, circumference of a circle, area of polygons and circles, surface area of rectangular prisms, and volume of prisms.

C. Science. The children will study anatomy and be able to demonstrate familiarity with the human skeletal system and will name the major bones and describe the function of the eye and ear. The children will learn to chemically define proteins, carbohydrates, and fats. They will be able to speak extemporaneously about the human being's interrelationship with the world from the perspective of chemistry. Through the principles of physics the children will display a knowledge of the principles of aerodynamics, meteorology, and hydraulics.

D. Social Studies, Geography, History. The children will study from the 1700's to the present including American History. They will read related literature including Shakespeare, epic, and dramatic poetry and folklore of that era. Study of the continents Asia, Antarctica, and Australia.

E. Music. There will be a boys/girls choir and a junior high orchestra.

F. Drawing, Painting, and handwork. The children will be doing three dimensional drawings and painting learning to depict space through color. They will begin the use of sewing machines. They will model the human head in clay.

G. Foreign Language. The emphasis will be on vocabulary building and dialogue.

State of New Mexico
Public School Facilities Authority



Robert A. Gorrell, Director
Tim Berry, Deputy Director

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June 11, 2012

Emily Cohen
Taos Mountain School
228 Valverde Street
Taos, NM 87571

Dear Ms. Cohen:

PSFA has received and reviewed the Facility Master Plan/Educational Specification (FMP/Ed Spec) for the proposed Taos Mountain Charter School. The FMP/Ed Spec's purpose is to guide you in the planning of and/or selection of a facility to ensure that it is adequate to accommodate your educational program and method of instruction. Based upon our review, PSFA is pleased to announce that the Plan meets our requirements. In accordance with House Bill 283, your next step is to submit your charter school application to the New Mexico Public Education Department (PED) and include your plan and this letter. We also request that you send us the plan in a 3-ring binder and include an electronic version once the PED approves your charter.

Through our review of the FMP/Ed Spec, PSFA understands the following:

- The school wishes to locate in a facility that currently houses the private Taos Waldorf School.
- The existing facility has classroom space for the school to begin operation and a new building will be needed in the future to accommodate the rest of the educational program (future Creative Arts Building) and additional classrooms needed to support the higher grade levels.
- Taos Mountain School intends to adopt the Waldorf curriculum model for its educational program.
- Taos Waldorf School supports the Taos Mountain School's Charter School application.
- You plan to have a cap of 208 students and consist of K-12th grades.
- You plan on having 13 classrooms, a creative arts building containing a multi-purpose room, music/art space, and performance space.
- You have reviewed our adequacy standards, planning guide and HB 283.

If you are a successful applicant, please remember to work closely with PSFA's Planning and Design team as you review your potential facility. You can reach us at (505) 843-6272.

Sincerely,

A handwritten signature in black ink, appearing to read "Tim Berry".

Facility Master Planner

cc: Martica Casias, Planning and Design Manager, PSFA
Robert Herron, Regional Manager, PSFA

**STATE EQUALIZATION GUARANTEE REVENUE ESTIMATE WORKSHEET
BASED ON MEMBERSHIP PROJECTIONS**

Charter Name **Taos Mountain Charter School**

Charter Number

	3 & 4 Yr. DD	3 & 4 Yr. A/B	C & C-GIFTED	D & D-GIFTED
Kindergarten Program				
ECE/KN				
FDK				
Basic Program				
Grade 1				
Grade 2				
Grade 3				
Grade 4				
Grade 5				
Grade 6				
Grade 7				
Grade 8				
Grade 9				
Grade 10				
Grade 11				
Grade 12				
Totals	0.00	0.00	0.00	0.00

*INCLUDE STUDENTS RECEIVING A/B SERVICES

Is this a Charter School?	Y
Is this for the 40th Day?	N

*BASIC	GRADE TOTAL
	0.00
18.00	18.00
12.00	12.00
10.00	10.00
14.00	14.00
10.00	10.00
10.00	10.00
14.00	14.00
0.00	0.00
0.00	0.00
12.00	12.00
0.00	0.00
0.00	0.00
0.00	0.00
100.00	100.00
ECE FTE	18.00
TOTAL GRADES 1-12	82.00
SUBTOTAL MEM	100.00
TOTAL MEM	100.00

	ECE FTE	COST INDEX	PROGRAM UNITS		
Kindergarten					
ECE, FDK-New, and FDK	18.00	1.44	25.920	Kindergarten Units	25.920
Basic Program (Grade Total)					
Grade 01	12.00	1.20	14.400		
Grade 02	10.00	1.18	11.800		
Grade 03	14.00	1.18	16.520		
Grade 04	10.00	1.045	10.450		
Grade 05	10.00	1.045	10.450		
Grade 06	14.00	1.045	14.630		
Grade 07 *	0.00	1.25	0.000		
Grade 08 *	0.00	1.25	0.000		
Grade 09 *	12.00	1.25	15.000		
Grade 10 *	0.00	1.25	0.000		
Grade 11 *	0.00	1.25	0.000		
Grade 12 *	0.00	1.25	0.000		
* Includes Vocational Weighting					
				Basic Program Units	93.250

Special Education	MEM	Factor			
C & C-Gifted	0.00	1.00	0.000		
D & D-Gifted	0.00	2.00	0.000		
3 & 4 Yr. DD	0.00	2.00	0.000		
3 & 4 Yr. A/B	10.00	0.70	7.000		
A/B MEM (Reg/Gifted)	10.00	0.70	7.000	Special Ed. Units	14.000
Adjusted Ancillary FTE	0.00	25.00		Ancillary FTE Units	0.000
				Total Special Education Units	14.000

Elementary Fine Arts Program	MEM	Factor			
	88.00	0.0500		Fine Arts Program Units	4.400

Bilingual Program	HOURS	MEM	FTE	Factor	
1			0.00		
2			0.00		
3			0.00		
Total Bilingual		0.00	0.00	0.500	Bilingual Units
(May not total more than the no. of students in grades K-12.)					

Elementary P.E. Program	MEM	Factor			
	0.00	0.060		Elementary P.E. Units	0.000

TOTAL MEMBERSHIP PROGRAM UNITS 137.570

T & E Index (Oct 2012) **1.098**

National Board Certified Teachers	FTE:	Factor			
		1.500		National Board Certified Teachers Units:	0.000

Size Adjustment Units	UNITS				
Elementary/Mid/Jr. High	50.000			District Size Adjustment Units	14.625
Senior High	0.000			Charter Schools not eligible for District Size	(14.625)
District Size	14.625			School Size Adjustment Units	50.000
				Rural Isolation Units	0.000
				New District Adjustment Units	0.000

At-Risk Units	At-risk index	MEM			
2012-2013:	0.048	100.00		At Risk Units	4.800

Charter Schools Student Activities	MEM	Factor			
(Districts Only)		0.100		Charter Schools Student Activities Units	0.000
				(Charters not eligible for CS Student Activities)	0.000

Home School Student Activities	MEM	Factor			
(Districts Only)		0.100		Home School Student Activities Units	0.000
				(Charters not eligible for Home School Student Activities)	0.000

TOTAL PROGRAM UNITS 205.852

Save Harmless Units 0.000

**STATE EQUALIZATION GUARANTEE REVENUE ESTIMATE WORKSHEET
BASED ON MEMBERSHIP PROJECTIONS**

GROWTH & SAVE HARMLESS CALCULATION DATA	
Projected Mem: (Enter the District Mem EXCLUDING Charter Mem)	100.00
Projected Mem: (Enter the District Mem EXCLUDING Charter Mem)	138.00
Projected Mem: (Enter the District Mem EXCLUDING Charter Mem)	
Save-Harmless Data	
2012-2013 40th Day TOTAL PROGRAM UNITS (Not Grand Total Program Units)	
Growth Data	
2012-13 Operating Budget Calculation	
Op-Bud takes 10-11 40 Day compared to 11-12 Mem Proj. FT	
40th Day Calculation 0.000	
Takes Prior Year 40th-Day and compares to Current Year 40th-Day	

GRAND TOTAL UNITS	205.852
x Unit Value	\$3,668.18
PROGRAM COST	\$755,102.19
Non-categorical Revenue Credits:	
Tax Levy (41110, 41113, 41114)	
Federal Impact Aid (44103)	
Federal Forest Reserve (44204)	
Total Non-Cat Rev Credits	\$0.00
Less: 75% of Non-Categorical Revenue Credits	\$0.00
Other Credits/Adjustments:	
Cash Balance Credit	
Energy Efficiency	
Energy Efficiency Renewable Bonds	
Other Misc Credits	
Total Other Credits	\$0.00
Less: Other Credits/Adjustments	\$0.00
	(\$15,102.04)

STATE EQUALIZATION GUARANTEE	\$740,000.15
-------------------------------------	---------------------

SIZE ADJUSTMENT UNITS: PED 9108-5

1. ELEMENTARY/MIDDLE SCHOOL/JUNIOR HIGH

List each school with a projected MEM (Basic 1-9 and Operational Fund Early Childhood FTE EXCLUDING SPECIAL ED.) of less than 200.
 $((200 - \text{MEM})/200) \times (1.0 \times \text{MEM}) = \text{UNITS}$

SCHOOL NAME	CODE	GRADES	MEM	UNITS
Taos Mountain Charter School		K-9	100.00	50.000
				0.000
				0.000
				0.000
				0.000
				0.000
				0.000
				0.000
TOTAL ELEMENTARY/MIDDLE SCHOOL/JUNIOR HIGH UNITS				50.000

2. SENIOR HIGH SCHOOL

List each school with a projected MEM (Basic 7-12 EXCLUDING SP. ED.) of less than 400 (program units will be computed using the formula which yields the most units):

$$((200 - \text{MEM})/200) \times (2.0 \times \text{MEM}) = \text{UNITS} \quad \text{or} \quad ((400 - \text{MEM})/400) \times (1.6 \times \text{MEM}) = \text{UNITS}$$

SCHOOL NAME	CODE	GRADES	MEM	UNITS
				0.000
				0.000
				0.000
				0.000
				0.000
				0.000
				0.000
TOTAL SENIOR HIGH SCHOOL UNITS				0.000

3. RURAL ISOLATION

Based on district MEM (Basic 1-12, Special Education C and D, Non-Profit and Operational Fund Childhood FTE), a district is eligible for units if it has a MEM greater than 10,000 with a ratio of MEM to senior high schools less than 4,000:1.

$$(4,000 - (\text{MEM} / \text{Eligible Senior High Schools})) \times 0.5 = \text{UNITS}$$

Enter the number of approved senior high schools (exclude alternative schools): N.A.
 Enter the number of approved senior high schools not eligible for senior high size units: 0.000

4. NEW DISTRICT ADJUSTMENT

If district is eligible, enter YES in the appropriate box.

- | | | |
|--------------------------------------------------------------------------------|------|-------|
| a. NEWLY CREATED SCHOOL DISTRICT | YES? | UNITS |
| (MEM for current year) $\times .147 = \text{UNITS}$ | | 0.000 |
| b. DISTRICT WHOSE MEMBERSHIP DECREASES AS A RESULT OF A NEWLY CREATED DISTRICT | | |
| (MEM for prior year - MEM for current year) $\times .17 = \text{UNITS}$ | | 0.000 |

Charter Name Taos Mountain Charter School

Charter Number

	3 & 4 Yr. DD	3 & 4 Yr. A/B	C & C-GIFTED	D & D-GIFTED
Kindergarten Program				
ECE/KN				
FDK				
Basic Program				
Grade 1				
Grade 2				
Grade 3				
Grade 4				
Grade 5				
Grade 6				
Grade 7				
Grade 8				
Grade 9				
Grade 10				
Grade 11				
Grade 12				
Totals	0.00	0.00	0.00	0.00

*INCLUDE STUDENTS RECEIVING A/B SERVICES

Is this a Charter School?

Y

Is this for the 40th Day?

N

*BASIC	GRADE TOTAL
	0.00
18.00	18.00
14.00	14.00
14.00	14.00
14.00	14.00
14.00	14.00
14.00	14.00
13.00	13.00
12.00	12.00
12.00	12.00
0.00	0.00
13.00	13.00
12.00	12.00
0.00	0.00
0.00	0.00
138.00	
ECE FTE	18.00
TOTAL GRADES 1-12	120.00
SUBTOTAL MEM	138.00
TOTAL MEM	138.00

	ECE FTE	COST INDEX	PROGRAM UNITS
Kindergarten			
ECE, FDK-New, and FDK	18.00	1.44	25.920
Basic Program (Grade Total)			
Grade 01	14.00	1.20	16.800
Grade 02	14.00	1.18	16.520
Grade 03	14.00	1.18	16.520
Grade 04	14.00	1.045	14.630
Grade 05	14.00	1.045	14.630
Grade 06	13.00	1.045	13.585
Grade 07 *	12.00	1.25	15.000
Grade 08 *	0.00	1.25	0.000
Grade 09 *	13.00	1.25	16.250
Grade 10 *	12.00	1.25	15.000
Grade 11 *	0.00	1.25	0.000
Grade 12 *	0.00	1.25	0.000
* Includes Vocational Weighting			

Basic Program Units 138.935

Special Education	MEM	Factor	
C & C-Gifted	0.00	1.00	0.000
D & D-Gifted	0.00	2.00	0.000

3 & 4 Yr. DD	0.00	2.00	0.000	
3 & 4 Yr. A/B	0.00	0.70	0.000	
A/B MEM (Reg/Gifted)	13.00	0.70	9.100	Special Ed. Unit: 9.100

Adjusted Ancillary FTE		25.00	Ancillary FTE Units	0.000
			Total Special Education Units	9.100

Elementary Fine Arts Program

MEM	Factor		
101.00	0.0500	Fine Arts Program Units	5.050

Bilingual Program

HOURS	MEM	FTE	Factor		
1		0.00			
2		0.00			
3		0.00			
Total Bilingual	0.00	0.00	0.500	Bilingual Units	0.000
(May not total more than the no. of students in grades K-12.)					

Elementary P.E. Program

MEM	Factor		
	0.060	Elementary P.E. Units	0.000

TOTAL MEMBERSHIP PROGRAM UNITS 179.005

T & E Index (Oct 2011) 1.098

National Board Certified Teachers

FTE:	Factor		
	1.500	National Board Certified Teachers Units:	0.000

ADJUSTED PROGRAM UNITS 196.547

Size Adjustment Units

	UNITS		
Elementary/Mid/Jr. High	0.000	District Size Adjustment Units	19.986
Senior High	0.000	Charter Schools not eligible for District Size	(19.986)
District Size	19.986	School Size Adjustment Units	0.000
		Rural Isolation Units	0.000

New District Adjustment Units 0.000

<u>At-Risk Units</u>	At-risk index	MEM
2012-2013:	0.048	138.00

At Risk Units 6.624

Charter Schools Student Activities

(Districts Only)	MEM	Factor		
		0.100	Charter Schools Student Activities Units	0.000
			(Charters not eligible for CS Student Activities)	0.000

Home School Student Activities

(Districts Only)	MEM	Factor		
		0.100	Home School Student Activities Units	0.000
			(Charters not eligible for Home School Student Activities)	0.000

TOTAL PROGRAM UNITS 272.561

Save Harmless Units 0.000

GROWTH & SAVE HARMLESS CALCULATION DATA

Projected Mem: 138.00
(Enter the District Mem EXCLUDING Charter Mem)

Projected Mem: 174.00
(Enter the District Mem EXCLUDING Charter Mem)

Projected Mem:
(Enter the District Mem EXCLUDING Charter Mem)

Save-Harmless Data

2012-2013 40th Day TOTAL PROGRAM UNITS
(Not Grand Total Program Units)

Growth Data

2012-13 Operating Budget Calculation 69.390

Op-Bud takes 10-11 40 Day compared to 11-12 Mem Proj. FTE

40th Day Calculation 0.000

Takes Prior Year 40th-Day and compares to Current Year 40th-Day

GRAND TOTAL UNITS 272.561

× Unit Value **\$3,778.23**

PROGRAM COST \$1,029,796.89

Non-categorical Revenue Credits:

Tax Levy (41110, 41113, 41114)

Federal Impact Aid (44103)

Federal Forest Reserve (44204)

Total Non-Cat Rev Credits \$0.00

Less: 75% of Non-Categorical Revenue Credits \$0.00

Other Credits/Adjustments:

Cash Balance Credit

Energy Efficiency

Energy Efficiency Renewable Bonds

Other Misc Credits

Total Other Credits \$0.00

Less: Other Credits/Adjustments \$0.00

(\$20,595.94)

STATE EQUALIZATION GUARANT \$1,009,200.96

SIZE ADJUSTMENT UNITS:

PED 910B-5

ELEMENTARY/MIDDLE SCHOOL/JUNIOR HIGH

List each school with a projected MEM (Basic 1-9 & Operational Fund Early Childhood FTE EXCLUDING SPECIAL ED) of less than 200
 $((200 - \text{MEM})/200) \times (1.0 \times \text{MEM}) = \text{UNITS}$

SCHOOL NAME

CODE

GRADES

MEM

UNITS

0.000
0.000
0.000
0.000
0.000
0.000
0.000
0.000

TOTAL ELEMENTARY/MIDDLE SCHOOL/JUNIOR HIGH UNITS

SENIOR HIGH SCHOOL

List each school with a projected MEM (*Basic 7-12 EXCLUDING SP. ED.*) of less than 400 (*program units will be computed using the formula which yields the most units*):

$$((200 - \text{MEM})/200) \times (2.0 \times \text{MEM}) = \text{UNITS} \quad \text{or} \quad ((400 - \text{MEM})/400) \times (1.6 \times \text{MEM}) = \text{UNITS}$$

SCHOOL NAME	CODE	GRADES	MEM	UNITS
				0.000
				0.000
				0.000
				0.000
				0.000
				0.000
TOTAL SENIOR HIGH SCHOOL UNITS				0.000

RURAL ISOLATION

Based on district MEM (*Basic 1-12, Special Education C and D, Non-Profit and Operational Fund Childhood FTE*), a district is eligible for units if it has a MEM greater than 10,000 with a ratio of MEM to senior high schools less than 4,000:1.

$$(4,000 - (\text{MEM} / \text{Eligible Senior High Schools})) \times 0.5 = \text{UNITS}$$

Enter the number of approved senior high schools (<i>exclude alternative schools</i>):		N.A.	
Enter the number of approved senior high schools not eligible for senior high size units:			0.000

NEW DISTRICT ADJUSTMENT

If district is eligible, enter YES in the appropriate box.

	YES?	UNITS
a. NEWLY CREATED SCHOOL DISTRICT		0.000
$(\text{MEM for current year}) \times .147 = \text{UNITS}$		
b. DISTRICT WHOSE MEMBERSHIP DECREASES AS A RESULT OF A NEWLY CREATED DISTRICT		0.000
$(\text{MEM for prior year} - \text{MEM for current year}) \times .17 = \text{UNITS}$		

Charter Name **Taos Mountain Charter School**

Charter Number

	3 & 4 Yr. DD	3 & 4 Yr. A/B	C & C-GIFTED	D & D-GIFTED
Kindergarten Program				
ECE/KN				
FDK				
Basic Program				
Grade 1				
Grade 2				
Grade 3				
Grade 4				
Grade 5				
Grade 6				
Grade 7				
Grade 8				
Grade 9				
Grade 10				
Grade 11				
Grade 12				
Totals	0.00	0.00	0.00	0.00

*INCLUDE STUDENTS RECEIVING A/B SERVICES

Is this a Charter School?	Y
Is this for the 40th Day?	N

*BASIC	GRADE TOTAL
	0.00
20.00	20.00
15.00	15.00
15.00	15.00
15.00	15.00
15.00	15.00
15.00	15.00
14.00	14.00
14.00	14.00
14.00	14.00
13.00	13.00
12.00	12.00
12.00	12.00
0.00	0.00
174.00	
ECE FTE	20.00
TOTAL GRADES 1-12	154.00
SUBTOTAL MEM	174.00
TOTAL MEM	174.00

	ECE FTE	COST INDEX	PROGRAM UNITS
Kindergarten			
ECE, FDK-New, and FDK	20.00	1.44	28.800
Basic Program (Grade Total)			
Grade 01	15.00	1.20	18.000
Grade 02	15.00	1.18	17.700
Grade 03	15.00	1.18	17.700
Grade 04	15.00	1.045	15.675
Grade 05	15.00	1.045	15.675
Grade 06	14.00	1.045	14.630
Grade 07 *	14.00	1.25	17.500
Grade 08 *	14.00	1.25	17.500
Grade 09 *	13.00	1.25	16.250
Grade 10 *	12.00	1.25	15.000
Grade 11 *	12.00	1.25	15.000
Grade 12 *	0.00	1.25	0.000

* Includes Vocational Weighting

Basic Program Units 180.630

Special Education	MEM	Factor	
C & C-Gifted	0.00	1.00	0.000
D & D-Gifted	0.00	2.00	0.000

3 & 4 Yr. DD	0.00	2.00	0.000	
3 & 4 Yr. A/B	0.00	0.70	0.000	
A/B MEM (Reg/Gifted)	17.00	0.70	11.900	Special Ed. Unit: 11.900

Adjusted Ancillary FTE		25.00	Ancillary FTE Units	0.000
			Total Special Education Units	11.900

Elementary Fine Arts Program

MEM	Factor		
109.00	0.0500	Fine Arts Program Units	5.450

Bilingual Program

HOURS	MEM	FTE	Factor		
1		0.00			
2		0.00			
3		0.00			
Total Bilingual	0.00	0.00	0.500	Bilingual Units	0.000
(May not total more than the no. of students in grades K-12.)					

Elementary P.E. Program

MEM	Factor		
	0.060	Elementary P.E. Units	0.000

TOTAL MEMBERSHIP PROGRAM UNITS 226.780

T & E Index (Oct 2011) 1.098

National Board Certified Teachers

FTE:	Factor		
	1.500	National Board Certified Teachers Units:	0.000

ADJUSTED PROGRAM UNITS 249.004

Size Adjustment Units

	UNITS		
Elementary/Mid/Jr. High	0.000	District Size Adjustment Units	24.965
Senior High	0.000	Charter Schools not eligible for District Size	(24.965)
District Size	24.965	School Size Adjustment Units	0.000
		Rural Isolation Units	0.000
		New District Adjustment Units	0.000

<u>At-Risk Units</u>	At-risk index	MEM
2012-2013:	0.048	174.00

At Risk Units 8.352

Charter Schools Student Activities

(Districts Only)	MEM	Factor		
		0.100	Charter Schools Student Activities Units	0.000
			(Charters not eligible for CS Student Activities)	0.000

Growth Units 29.150

Home School Student Activities

(Districts Only)	MEM	Factor		
		0.100	Home School Student Activities Units	0.000
			(Charters not eligible for Home School Student Activities)	0.000

TOTAL PROGRAM UNITS 286.506

Save Harmless Units	0.000
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GROWTH & SAVE HARMLESS CALCULATION DATA

<i>Projected Mem:</i>	174.00
(Enter the District Mem EXCLUDING Charter Mem)	

<i>Projected Mem:</i>	190.00
(Enter the District Mem EXCLUDING Charter Mem)	

Projected Mem:

(Enter the District Mem EXCLUDING Charter Mem)

Save-Harmless Data

2012-2013 40th Day TOTAL PROGRAM UNITS
(Not Grand Total Program Units)

Growth Data

2012-13 Operating Budget Calculation	29.150
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Op-Bud takes 10-11 40 Day compared to 11-12 Mem Proj. 1

40th Day Calculation	0.000
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Takes Prior Year 40th-Day and compares to Current Year 40th-

GRAND TOTAL UNITS	286.506
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× Unit Value	\$3,891.57
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PROGRAM COST \$1,114,958.77

Non-categorical Revenue Credits:

Tax Levy (41110, 41113, 41114)

Federal Impact Aid (44103)

Federal Forest Reserve (44204)

Total Non-Cat Rev Credits	\$0.00
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<u>Less: 75% of Non-Categorical Revenue Credits</u>	\$0.00
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Other Credits/Adjustments:

Cash Balance Credit

Energy Efficiency

Energy Efficiency Renewable Bonds

Other Misc Credits

Total Other Credits	\$0.00
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<u>Less: Other Credits/Adjustments</u>	\$0.00
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(\$22,299.18)

STATE EQUALIZATION GUARANT	\$1,092,659.60
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SIZE ADJUSTMENT UNITS: PED 910B-5

ELEMENTARY/MIDDLE SCHOOL/JUNIOR HIGH

List each school with a projected MEM (Basic 1-9 and Operational Fund Early Childhood FTE EXCLUDING SPECIAL ED.) of less than 200.

$$((200 - \text{MEM})/200) \times (1.0 \times \text{MEM}) = \text{UNITS}$$

SCHOOL NAME

CODE

GRADES

MEM

UNITS

0.000

0.000

0.000

0.000

0.000

0.000

0.000

TOTAL ELEMENTARY/MIDDLE SCHOOL/JUNIOR HIGH UNITS

SENIOR HIGH SCHOOL

List each school with a projected MEM (*Basic 7-12 EXCLUDING SP. ED.*) of less than 400 (*program units will be computed using the formula which yields the most units*):

$$((200 - \text{MEM})/200) \times (2.0 \times \text{MEM}) = \text{UNITS} \quad \text{or} \quad ((400 - \text{MEM})/400) \times (1.6 \times \text{MEM}) = \text{UNITS}$$

[illegible]

RURAL ISOLATION

Based on district MEM (Basic 1-12, Special Education C and D, Non-Profit and Operational Fund Childhood FTE), a district is eligible for units if it has a MEM greater than 10,000 with a ratio of MEM to senior high schools less than 4,000:1.

$$(4,000 - (\text{MEM} / \text{Eligible Senior High Schools})) \times 0.5 = \text{UNITS}$$

Enter the number of approved senior high schools (*exclude alternative schools*): N.A.

Enter the number of approved senior high schools not eligible for senior high size units:		0.000
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NEW DISTRICT ADJUSTMENT

If district is eligible, enter **YES** in the appropriate box.

	YES?	UNITS
a. NEWLY CREATED SCHOOL DISTRICT		0.000

$$(\text{MEM for current year}) \times .147 = \text{UNITS}$$

b. DISTRICT WHOSE MEMBERSHIP DECREASES AS A RESULT OF A NEWLY CREATED DISTRICT

$(MEM \text{ for prior year} - MEM \text{ for current year}) \times .17 = \text{UNITS}$	0.000
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Charter Name Taos Mountain Charter School

Charter Number

	3 & 4 Yr. DD	3 & 4 Yr. A/B	C & C-GIFTED	D & D-GIFTED
Kindergarten Program				
ECE/KN				
FDK				
Basic Program				
Grade 1				
Grade 2				
Grade 3				
Grade 4				
Grade 5				
Grade 6				
Grade 7				
Grade 8				
Grade 9				
Grade 10				
Grade 11				
Grade 12				
Totals	0.00	0.00	0.00	0.00

*INCLUDE STUDENTS RECEIVING A/B SERVICES

Is this a Charter School?

Y

Is this for the 40th Day?

N

*BASIC	GRADE TOTAL
	0.00
20.00	20.00
16.00	16.00
16.00	16.00
16.00	16.00
16.00	16.00
16.00	16.00
15.00	15.00
15.00	15.00
15.00	15.00
12.00	12.00
12.00	12.00
11.00	11.00
10.00	10.00
190.00	
ECE FTE	20.00
TOTAL GRADES 1-12	170.00
SUBTOTAL MEM	190.00
TOTAL MEM	190.00

	ECE FTE	COST INDEX	PROGRAM UNITS
Kindergarten			
ECE, FDK-New, and FDK	20.00	1.44	28.800
Basic Program (Grade Total)			
Grade 01	16.00	1.20	19.200
Grade 02	16.00	1.18	18.880
Grade 03	16.00	1.18	18.880
Grade 04	16.00	1.045	16.720
Grade 05	16.00	1.045	16.720
Grade 06	15.00	1.045	15.675
Grade 07 *	15.00	1.25	18.750
Grade 08 *	15.00	1.25	18.750
Grade 09 *	12.00	1.25	15.000
Grade 10 *	12.00	1.25	15.000
Grade 11 *	11.00	1.25	13.750
Grade 12 *	10.00	1.25	12.500

* Includes Vocational Weighting

Basic Program Units 199.825

Special Education	MEM	Factor	
C & C-Gifted	0.00	1.00	0.000
D & D-Gifted	0.00	2.00	0.000

3 & 4 Yr. DD	0.00	2.00	0.000	
3 & 4 Yr. A/B	0.00	0.70	0.000	
A/B MEM (Reg/Gifted)	19.00	0.70	13.300	Special Ed. Unit: 13.300

Adjusted Ancillary FTE		25.00	Ancillary FTE Units	0.000
			Total Special Education Units	13.300

Elementary Fine Arts Program

MEM	Factor		
115.00	0.0500	Fine Arts Program Units	5.750

Bilingual Program

HOURS	MEM	FTE	Factor		
1		0.00			
2		0.00			
3		0.00			
Total Bilingual	0.00	0.00	0.500	Bilingual Units	0.000
(May not total more than the no. of students in grades K-12.)					

Elementary P.E. Program

MEM	Factor		
	0.060	Elementary P.E. Units	0.000

TOTAL MEMBERSHIP PROGRAM UNITS 247.675

T & E Index (Oct 2011) 1.098

National Board Certified Teachers

FTE:	Factor		
	1.500	National Board Certified Teachers Units:	0.000

ADJUSTED PROGRAM UNITS 271.947

Size Adjustment Units

	UNITS		
Elementary/Mid/Jr. High	0.000	District Size Adjustment Units	27.146
Senior High	0.000	Charter Schools not eligible for District Size	(27.146)
District Size	27.146	School Size Adjustment Units	0.000
		Rural Isolation Units	0.000
		New District Adjustment Units	0.000

<u>At-Risk Units</u>	At-risk index	MEM
2012-2013:	0.048	190.00

At Risk Units 9.120

Charter Schools Student Activities

(Districts Only)	MEM	Factor		
		0.100	Charter Schools Student Activities Units	0.000
			(Charters not eligible for CS Student Activities)	0.000

Growth Units 5.090

Home School Student Activities

(Districts Only)	MEM	Factor		
		0.100	Home School Student Activities Units	0.000
			(Charters not eligible for Home School Student Activities)	0.000

TOTAL PROGRAM UNITS 286.157

Save Harmless Units	0.000
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GROWTH & SAVE HARMLESS CALCULATION DATA

<i>Projected Mem:</i>	190.00
(Enter the District Mem EXCLUDING Charter Mem)	

<i>Projected Mem:</i>	194.00
(Enter the District Mem EXCLUDING Charter Mem)	

Projected Mem:
(Enter the District Mem EXCLUDING Charter Mem)

Save-Harmless Data

2012-2013 40th Day TOTAL PROGRAM UNITS
(Not Grand Total Program Units)

Growth Data

2012-13 Operating Budget Calculation 5.090

Op-Bud takes 10-11 40 Day compared to 11-12 Mem Proj. P

40th Day Calculation	0.000
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Takes Prior Year 40th-Day and compares to Current Year 40th-

GRAND TOTAL UNITS	286.157
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× Unit Value	\$4,008.32
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PROGRAM COST \$1,147,008.63

Non-categorical Revenue Credits:

Tax Levy (41110, 41113, 41114)

Federal Impact Aid (44103)

Federal Forest Reserve (44204)

Total Non-Cat Rev Credits	\$0.00
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<u>Less: 75% of Non-Categorical Revenue Credits</u>	\$0.00
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Other Credits/Adjustments:

Cash Balance Credit

Energy Efficiency

Energy Efficiency Renewable Bonds

Other Misc Credits

Total Other Credits	\$0.00
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<u>Less:</u> Other Credits/Adjustments	\$0.00
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(\$22,940.17)

STATE EQUALIZATION GUARANT	\$1,124,068.46
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SIZE ADJUSTMENT UNITS:

PED 910B-5

ELEMENTARY/MIDDLE SCHOOL/JUNIOR HIGH

List each school with a projected MEM (Basic 1-9 and Operational Fund Early Childhood FTE EXCLUDING SPECIAL ED.) of less than 200.

$$((200 - \text{MEM})/200) \times (1.0 \times \text{MEM}) = \text{UNITS}$$

SCHOOL NAME

CODE

GRADES

MEM

UNITS

0.000

0.000

0.000

0.000

0.000

0.000

0.000

TOTAL ELEMENTARY/MIDDLE SCHOOL/JUNIOR HIGH UNITS

SENIOR HIGH SCHOOL

List each school with a projected MEM (*Basic 7-12 EXCLUDING SP. ED.*) of less than 400 (*program units will be computed using the formula which yields the most units*):

$$((200 - \text{MEM})/200) \times (2.0 \times \text{MEM}) = \text{UNITS} \quad \text{or} \quad ((400 - \text{MEM})/400) \times (1.6 \times \text{MEM}) = \text{UNITS}$$

SCHOOL NAME	CODE	GRADES	MEM	UNITS
				0.000
				0.000
				0.000
				0.000
				0.000
				0.000
				0.000
TOTAL SENIOR HIGH SCHOOL UNITS				0.000

RURAL ISOLATION

Based on district MEM (Basic 1-12, Special Education C and D, Non-Profit and Operational Fund Childhood FTE), a district is eligible for units if it has a MEM greater than 10,000 with a ratio of MEM to senior high schools less than 4,000:1.

$$(4,000 - (\text{MEM} / \text{Eligible Senior High Schools})) \times 0.5 = \text{UNITS}$$

Enter the number of approved senior high schools (<i>exclude alternative schools</i>):	N.A.	
Enter the number of approved senior high schools not eligible for senior high size units:		0.000

NEW DISTRICT ADJUSTMENT

If district is eligible, enter YES in the appropriate box.

	YES?	UNITS
a. NEWLY CREATED SCHOOL DISTRICT		0.000
$(\text{MEM for current year}) \times .147 = \text{UNITS}$		
b. DISTRICT WHOSE MEMBERSHIP DECREASES AS A RESULT OF A NEWLY CREATED DISTRICT		0.000
$(\text{MEM for prior year} - \text{MEM for current year}) \times .17 = \text{UNITS}$		

Charter Name **Taos Mountain Charter School**

Charter Number

	3 & 4 Yr. DD	3 & 4 Yr. A/B	C & C-GIFTED	D & D-GIFTED
Kindergarten Program				
ECE/KN				
FDK				
Basic Program				
Grade 1				
Grade 2				
Grade 3				
Grade 4				
Grade 5				
Grade 6				
Grade 7				
Grade 8				
Grade 9				
Grade 10				
Grade 11				
Grade 12				
Totals	0.00	0.00	0.00	0.00

*INCLUDE STUDENTS RECEIVING A/B SERVICES

Is this a Charter School?	Y
Is this for the 40th Day?	N

*BASIC	GRADE TOTAL
	0.00
20.00	20.00
16.00	16.00
16.00	16.00
16.00	16.00
16.00	16.00
16.00	16.00
16.00	16.00
15.00	15.00
15.00	15.00
12.00	12.00
12.00	12.00
12.00	12.00
12.00	12.00
194.00	
ECE FTE	20.00
TOTAL GRADES 1-12	174.00
SUBTOTAL MEM	194.00
TOTAL MEM	194.00

	ECE FTE	COST INDEX	PROGRAM UNITS
Kindergarten			
ECE, FDK-New, and FDK	20.00	1.44	28.800
Basic Program (Grade Total)			
Grade 01	16.00	1.20	19.200
Grade 02	16.00	1.18	18.880
Grade 03	16.00	1.18	18.880
Grade 04	16.00	1.045	16.720
Grade 05	16.00	1.045	16.720
Grade 06	16.00	1.045	16.720
Grade 07 *	15.00	1.25	18.750
Grade 08 *	15.00	1.25	18.750
Grade 09 *	12.00	1.25	15.000
Grade 10 *	12.00	1.25	15.000
Grade 11 *	12.00	1.25	15.000
Grade 12 *	12.00	1.25	15.000

* Includes Vocational Weighting

Basic Program Units 204.620

Special Education	MEM	Factor	
C & C-Gifted	0.00	1.00	0.000
D & D-Gifted	0.00	2.00	0.000

3 & 4 Yr. DD	0.00	2.00	0.000		
3 & 4 Yr. A/B	0.00	0.70	0.000		
A/B MEM (Reg/Gifted)	19.00	0.70	13.300	Special Ed. Unit:	13.300

Adjusted Ancillary FTE		25.00	Ancillary FTE Units	0.000	
			Total Special Education Units		13.300

Elementary Fine Arts Program

MEM	Factor			
116.00	0.0500		Fine Arts Program Units	5.800

Bilingual Program

HOURS	MEM	FTE	Factor		
1		0.00			
2		0.00			
3		0.00			
Total Bilingual	0.00	0.00	0.500	Bilingual Units	0.000
(May not total more than the no. of students in grades K-12.)					

Elementary P.E. Program

MEM	Factor			
	0.060		Elementary P.E. Units	0.000

TOTAL MEMBERSHIP PROGRAM UNITS 252.520

T & E Index (Oct 2011) 1.098

National Board Certified Teachers

FTE:	Factor			
	1.500		National Board Certified Teachers Units:	0.000

Size Adjustment Units

	UNITS			
Elementary/Mid/Jr. High	0.000		District Size Adjustment Units	27.689
Senior High	0.000		Charter Schools not eligible for District Size	(27.689)
District Size	27.689		School Size Adjustment Units	0.000
			Rural Isolation Units	0.000

<u>At-Risk Units</u>	At-risk index	MEM
2012-2013:	0.048	194.00

New District Adjustment Units 0.000

At Risk Units 9.312

Charter Schools Student Activities

(Districts Only)	MEM	Factor		
		0.100	Charter Schools Student Activities Units	0.000
			(Charters not eligible for CS Student Activities)	0.000

Home School Student Activities

(Districts Only)	MEM	Factor		
		0.100	Home School Student Activities Units	0.000
			(Charters not eligible for Home School Student Activities)	0.000

TOTAL PROGRAM UNITS 286.579

Save Harmless Units 0.000

GROWTH & SAVE HARMLESS CALCULATION DATA

Projected Mem: 194.00
(Enter the District Mem EXCLUDING Charter Mem)

Projected Mem: 194.00
(Enter the District Mem EXCLUDING Charter Mem)

Projected Mem:
(Enter the District Mem EXCLUDING Charter Mem)

Save-Harmless Data

2012-2013 40th Day TOTAL PROGRAM UNITS
(Not Grand Total Program Units)

Growth Data

2012-13 Operating Budget Calculation 0.000

Op-Bud takes 10-11 40 Day compared to 11-12 Mem Proj. FTE

40th Day Calculation 0.000

Takes Prior Year 40th-Day and compares to Current Year 40th-Day

GRAND TOTAL UNITS 286.579

× Unit Value \$4,128.57

PROGRAM COST \$1,183,161.15

Non-categorical Revenue Credits:

Tax Levy (41110, 41113, 41114)

Federal Impact Aid (44103)

Federal Forest Reserve (44204)

Total Non-Cat Rev Credits \$0.00

Less: 75% of Non-Categorical Revenue Credits \$0.00

Other Credits/Adjustments:

Cash Balance Credit

Energy Efficiency

Energy Efficiency Renewable Bonds

Other Misc Credits

Total Other Credits \$0.00

Less: Other Credits/Adjustments \$0.00

(\$23,663.22)

STATE EQUALIZATION GUARANT \$1,159,497.93

SIZE ADJUSTMENT UNITS:

PED 910B-5

ELEMENTARY/MIDDLE SCHOOL/JUNIOR HIGH

List each school with a projected MEM (Basic 1-9 and Operational Fund Early Childhood FTE EXCLUDING SPECIAL ED.) of less than 200.

$((200 - \text{MEM})/200) \times (1.0 \times \text{MEM}) = \text{UNITS}$

SCHOOL NAME

CODE

GRADES

MEM

UNITS

0.000
0.000
0.000
0.000
0.000
0.000
0.000

TOTAL ELEMENTARY/MIDDLE SCHOOL/JUNIOR HIGH UNITS

0.000

SENIOR HIGH SCHOOL

List each school with a projected MEM (*Basic 7-12 EXCLUDING SP. ED.*) of less than 400 (*program units will be computed using the formula which yields the most units*):

$$((200 - \text{MEM})/200) \times (2.0 \times \text{MEM}) = \text{UNITS} \quad \text{or} \quad ((400 - \text{MEM})/400) \times (1.6 \times \text{MEM}) = \text{UNITS}$$

SCHOOL NAME	CODE	GRADES	MEM	UNITS
				0.000
				0.000
				0.000
				0.000
				0.000
				0.000
				<u>0.000</u>
TOTAL SENIOR HIGH SCHOOL UNITS				0.000

RURAL ISOLATION

Based on district MEM (Basic 1-12, Special Education C and D, Non-Profit and Operational Fund Childhood FTE), a district is eligible for units if it has a MEM greater than 10,000 with a ratio of MEM to senior high schools less than 4,000:1.

$$(4,000 - (\text{MEM} / \text{Eligible Senior High Schools})) \times 0.5 = \text{UNITS}$$

Enter the number of approved senior high schools (*exclude alternative schools*):

N.A.

Enter the number of approved senior high schools not eligible for senior high size units:

0.000

NEW DISTRICT ADJUSTMENT

If district is eligible, enter **YES** in the appropriate box.

a. NEWLY CREATED SCHOOL DISTRICT

YES?

UNITS

$$(\text{MEM for current year}) \times .147 = \text{UNITS}$$

b. DISTRICT WHOSE MEMBERSHIP DECREASES AS A RESULT OF A NEWLY CREATED DISTRICT

$$(\text{MEM for prior year} - \text{MEM for current year}) \times .17 = \text{UNITS}$$

0.000

Charter's Five Year Budget Plan

FUND	FUNCTION	OBJECT	JOB CLASS	OBJECT DESCRIPTION	PROJ. AMT (YEAR 1)	FTE	PROJ. AMT (YEAR 2)	FTE	PROJ. AMT (YEAR 3)	FTE	PROJ. AMT (YEAR 4)	FTE	PROJ. AMT (YEAR 5)	FTE
11000	EXPENDITURES													
	Function-1000 - Instruction													
				Personnel Services - Compensation										
11000	1000	51100	1411	Salaries Expense: Teachers Grades 1-12	\$280,000.00	7.00	\$370,800.00	9.00	\$466,796.00	11.00	\$524,508.96	12.00	\$585,264.58	13.00
11000	1000	51100	1412	Salaries Expense: Teachers Special Education	\$20,000.00	0.50	\$20,600.00	0.50	\$21,218.00	0.50	\$31,827.00	0.75	\$32,781.81	0.75
11000	1000	51100	1413	Salaries Expense: Teachers Early Childhood Ed.	\$40,000.00	1.00	\$41,200.00	1.00	\$42,436.00	1.00	\$43,709.08	1.00	\$45,020.35	1.00
11000	1000	51100	1414	Salaries Expense: Teachers Preschool (Excludes Special Ed.)										
11000	1000	51100	1415	Salaries Expense: Teachers Vocational and Technical										
11000	1000	51100	1416	Salaries Expense: Teachers Other Instruction	\$60,000.00	2.00	\$62,000.00	2.00	\$93,000.00	3.00	\$124,000.00	3.50	\$127,720.00	3.50
11000	1000	51100	1611	Salaries Expense: Substitutes Sick Leave	\$4,000.00		\$5,000.00		\$5,800.00		\$6,000.00		\$6,000.00	
11000	1000	51100	1612	Salaries Expense: Substitutes Other Leave	\$1,000.00		\$1,200.00		\$1,800.00		\$2,000.00		\$2,000.00	
11000	1000	51100	1613	Salaries Expense: Separation Pay										
11000	1000	51100	1618	Salaries Expense: Athletics										
11000	1000	51100	1621	Salaries Expense: Summer School/After School										
11000	1000	51100	1624	Salaries Expense: Activities Salaries										
11000	1000	51100	1711	Salaries Expense: Instructional Assistants Grades 1-12										
11000	1000	51100	1712	Salaries Expense: Instructional Assistants Special Ed.										
11000	1000	51100	1713	Salaries Expense: Instructional Assistants ECE	\$20,000.00	1.00	\$20,600.00	1.00	\$21,218.00	1.00	\$21,854.54	1.00	\$22,510.18	1.00
11000	1000	51100	1714	Salaries Expense: Inst Asst. Preschool (Excludes Spec. Ed.)										
				Total: Personnel Services Compensation	\$425,000.00	11.50	\$521,400.00	13.50	\$652,268.00	16.50	\$753,899.58	18.25	\$821,296.92	19.25
				Personnel Services - Employee Benefits										
11000	1000	52111	0000	Educational Retirement	\$12,000.00		\$14,838.00		\$18,703.50		\$21,422.18		\$23,415.45	
11000	1000	52112	0000	ERA - Retiree Health										
11000	1000	52210	0000	FICA Payments	\$32,512.50		\$39,887.10		\$49,898.50		\$57,673.32		\$62,829.21	
11000	1000	52220	0000	Medicare Payments										
11000	1000	52311	0000	Health and Medical Premiums	\$52,800.00		\$62,400.00		\$76,800.00		\$84,000.00		\$88,800.00	
11000	1000	52312	0000	Life										
11000	1000	52313	0000	Dental										
11000	1000	52314	0000	Vision										
11000	1000	52315	0000	Disability										
11000	1000	52316	0000	Other Insurance - SUI, SDI	\$5,244.00		\$5,260.00		\$5,284.00		\$5,298.00		\$5,306.00	
11000	1000	52500	0000	Unemployment Compensation										
11000	1000	52710	0000	Workers Compensation Premium - for ALL staff	\$2,500.00		\$2,500.00		\$2,800.00		\$2,800.00		\$3,000.00	
11000	1000	52720	0000	Workers Compensation Employer's Fee	\$500.00		\$500.00		\$500.00		\$500.00		\$500.00	
11000	1000	52730	0000	Workers Compensation (Self Insured)										
11000	1000	52911	0000	Cafeteria Plan Fees										
11000	1000	52912	0000	Employee Assistance Programs										
11000	1000	52913	0000	Workers Compensation Employee Fees										
11000	1000	52914	0000	Deferred Sick Leave Reserve										
				Total: Personnel Services Employee Benefits	\$105,556.50		\$125,385.10		\$153,986.00		\$171,693.50		\$183,850.67	
				Purchased Professional and Technical Services										
11000	1000	53414	0000	Other Professional Services - Visiting Educators	\$2,500.00		\$2,500.00		\$5,000.00		\$5,000.00		\$5,000.00	
11000	1000	53711	0000	Other Charges										
				Total: Purchased Professional and Tech Services	\$2,500.00		\$2,500.00		\$5,000.00		\$5,000.00		\$5,000.00	
				Other Purchased Services										
11000	1000	55813	0000	Employee Travel - Non-Teachers										
11000	1000	55814	0000	Employee Training - Non-Teachers										
11000	1000	55817	0000	Student Travel										
11000	1000	55818	0000	Other Travel - Non-Employees										
11000	1000	55819	0000	Employee Travel - Teachers	\$3,450.00		\$5,000.00		\$5,000.00		\$5,000.00		\$5,000.00	
11000	1000	55820	0000	Employee Training - Teachers	\$7,500.00		\$8,000.00		\$8,500.00		\$9,000.00		\$9,500.00	
11000	1000	55914	0000	Contracts - Interagency										
11000	1000	55915	0000	Other Contract Services										
				Total: Other Purchased Services	\$10,950.00		\$13,000.00		\$13,500.00		\$14,000.00		\$14,500.00	
				Supplies										
11000	1000	56112	0000	Other Textbooks	\$2,500.00		\$2,500.00		\$2,500.00		\$2,800.00		\$2,800.00	
11000	1000	56113	0000	Software	\$500.00		\$500.00		\$500.00		\$500.00		\$500.00	
11000	1000	56118	0000	General Supplies and Materials	\$12,500.00		\$15,625.00		\$18,750.00		\$21,875.00		\$25,000.00	
				Total: Supplies	\$15,500.00		\$18,625.00		\$21,750.00		\$25,175.00		\$28,300.00	
				Property										
11000	1000	57331	0000	Fixed Assets (more than \$5,000)										
11000	1000	57332	0000	Supply Assets (\$5,000 or less)										
				Total: Property	\$0.00		\$0.00		\$0.00		\$0.00		\$0.00	
11000	1000			TOTAL: INSTRUCTION	\$559,506.50	11.50	\$680,910.10	13.50	\$846,504.00	16.50	\$969,768.08	18.25	\$1,052,947.59	19.25

Charter's Five Year Budget Plan

FUND	FUNCTION	OBJECT	JOB CLASS	OBJECT DESCRIPTION	PROJ. AMT (YEAR 1)	FTE	PROJ. AMT (YEAR 2)	FTE	PROJ. AMT (YEAR 3)	FTE	PROJ. AMT (YEAR 4)	FTE	PROJ. AMT (YEAR 5)	FTE
11000	EXPENDITURES													
	Function-2100 - Support Services - Students													
	Personnel Services - Compensation													
11000	2100	51100	1211	Salaries Expense: Coordinator/Subject Matter Specialist										
11000	2100	51100	1214	Salaries Expense: Guidance Counselors/Social Workers										
11000	2100	51100	1215	Salaries Expense: Registered Nurse										
11000	2100	51100	1216	Salaries Expense: Health Assistants										
11000	2100	51100	1217	Salaries Expense: Secretary, Clerical, Technical Assistants										
11000	2100	51100	1218	Salaries Expense: School/Student Support										
11000	2100	51100	1311	Salaries Expense: Diagnostician										
11000	2100	51100	1312	Salaries Expense: Speech Therapist										
11000	2100	51100	1313	Salaries Expense: Occupational Therapist										
11000	2100	51100	1314	Salaries Expense: Physical Therapist/Recreational Therapist										
11000	2100	51100	1315	Salaries Expense: Psychologist Counselors										
11000	2100	51100	1316	Salaries Expense: Audiologists										
11000	2100	51100	1317	Salaries Expense: Interpreters										
11000	2100	51100	1318	Salaries Expense: Specialists										
11000	2100	51100	1319	Salaries Expense: Special Ed. Assistants										
11000	2100	51100	1511	Salaries Expense: Data Processing										
				Total: Personnel Services - Compensation	\$0.00	0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	0.00
	Personnel Services - Employee Benefits													
11000	2100	52111	0000	Educational Retirement										
11000	2100	52112	0000	ERA - Retiree Health										
11000	2100	52210	0000	FICA Payments										
11000	2100	52220	0000	Medicare Payments										
11000	2100	52311	0000	Health and Medical Premiums										
11000	2100	52312	0000	Life										
11000	2100	52313	0000	Dental										
11000	2100	52314	0000	Vision										
11000	2100	52315	0000	Disability										
11000	2100	52316	0000	Other Insurance - SUI, SDI										
11000	2100	52500	0000	Unemployment Compensation										
11000	2100	52710	0000	Workers Compensation Premium										
11000	2100	52720	0000	Workers Compensation Employer's Fee										
11000	2100	52730	0000	Workers Compensation (Self Insured)										
11000	2100	52911	0000	Cafeteria Plan Fees										
11000	2100	52912	0000	Employee Assistance Programs										
11000	2100	52913	0000	Workers Compensation Employee Fees										
11000	2100	52914	0000	Deferred Sick Leave Reserve										
				Total: Personnel Services - Employee Benefits	\$0.00		\$0.00		\$0.00		\$0.00		\$0.00	
	Purchased Professional and Technical Services													
11000	2100	53211	0000	Diagnosticians - Contracted	\$3,000.00		\$5,000.00		\$5,000.00		\$5,000.00		\$5,000.00	
11000	2100	53212	0000	Speech Therapists - Contracted	\$10,000.00		\$10,000.00		\$12,500.00		\$12,500.00		\$15,000.00	
11000	2100	53213	0000	Occupational Therapists - Contracted	\$2,500.00		\$2,500.00		\$5,000.00		\$5,000.00		\$5,000.00	
11000	2100	53214	0000	Physical/Recreational Therapists - Contracted										
11000	2100	53215	0000	Psychologists/Counselors - Contracted										
11000	2100	53215	0000	Psychologists/Counselors - Contracted										
11000	2100	53216	0000	Audiologists - Contracted										
11000	2100	53217	0000	Interpreters - Contracted										
11000	2100	53218	0000	Specialists - Contracted	\$2,000.00		\$3,000.00		\$4,000.00		\$5,000.00		\$5,000.00	
11000	2100	53219	0000	Special Ed Assistants (Non-Instructional) - Contracted										
11000	2100	53414	0000	Other Professional Services										
				Total: Purchased Professional and Tech Services	\$17,500.00		\$20,500.00		\$26,500.00		\$27,500.00		\$30,000.00	
	Purchased Professional and Technical Services													
11000	2100	53414	0000	Other Professional Services										
11000	2100	53711	0000	Other Charges										
				Total: Support Services - Students	\$0.00		\$0.00		\$0.00		\$0.00		\$0.00	
	Other Purchased Services													
11000	2100	55200	0000	Property/Liability Insurance										
11000	2100	55813	0000	Employee Travel - Non-Teachers										
11000	2100	55814	0000	Employee Training - Non-Teachers										
11000	2100	55818	0000	Other Travel - Non-Employees										
11000	2100	55914	0000	Contracts - Interagency										
11000	2100	55915	0000	Other Contract Services										
				Total: Other Purchased Services	\$0.00		\$0.00		\$0.00		\$0.00		\$0.00	

Charter's Five Year Budget Plan

FUND	FUNCTION	OBJECT	JOB CLASS	OBJECT DESCRIPTION	PROJ. AMT (YEAR 1)	FTE	PROJ. AMT (YEAR 2)	FTE	PROJ. AMT (YEAR 3)	FTE	PROJ. AMT (YEAR 4)	FTE	PROJ. AMT (YEAR 5)	FTE
11000	EXPENDITURES													
		Supplies												
11000	2100	56113	0000	Software										
11000	2100	56118	0000	General Supplies and Materials										
				Total: Supplies	\$0.00		\$0.00		\$0.00		\$0.00		\$0.00	
		Property												
11000	2100	57331	0000	Fixed Assets (more than \$5,000)										
11000	2100	57332	0000	Supply Assets (\$5,000 or less)										
				Total: Property	\$0.00		\$0.00		\$0.00		\$0.00		\$0.00	
11000	2100			TOTAL: SUPPORT SERVICES - STUDENTS	\$17,500.00	0.00	\$20,500.00	0.00	\$26,500.00	0.00	\$27,500.00	0.00	\$30,000.00	0.00
	Function-2200 - Support Services - Instruction													
		Personnel Services - Compensation												
11000	2200	51100	1211	Salaries Expense: Coordinator/Subject Matter Specialist										
11000	2200	51100	1212	Salaries Expense: Library/Media Specialist										
11000	2200	51100	1213	Salaries Expense: Library/Media Assistants										
11000	2200	51100	1217	Salaries Expense: Secretary, Clerical, Technical Assistants										
11000	2200	51100	1511	Salaries Expense: Data Processing										
				Total: Support Services - Instruction	\$0.00	0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	0.00
		Personnel Services - Employee Benefits												
11000	2200	52111	0000	Educational Retirement										
11000	2200	52112	0000	ERA - Retiree Health										
11000	2200	52210	0000	FICA Payments										
11000	2200	52220	0000	Medicare Payments										
11000	2200	52311	0000	Health and Medical Premiums										
11000	2200	52312	0000	Life										
11000	2200	52313	0000	Dental										
11000	2200	52314	0000	Vision										
11000	2200	52315	0000	Disability										
11000	2200	52316	0000	Other Insurance										
11000	2200	52500	0000	Unemployment Compensation										
11000	2200	52710	0000	Workers Compensation Premium										
11000	2200	52720	0000	Workers Compensation Employer's Fee										
11000	2200	52730	0000	Workers Compensation (Self Insured)										
11000	2200	52911	0000	Cafeteria Plan Fees										
11000	2200	52912	0000	Employee Assistance Programs										
11000	2200	52913	0000	Workers Compensation Employee Fees										
11000	2200	52914	0000	Deferred Sick Leave Reserve										
				Total: Personnel Services - Employee Benefits	\$0.00		\$0.00		\$0.00		\$0.00		\$0.00	
		Purchased Professional and Technical Services												
11000	2200	53414	0000	Other Professional Services										
11000	2200	53711	0000	Other Charges										
				Total: Purchased Professional and Tech Services	\$0.00		\$0.00		\$0.00		\$0.00		\$0.00	
		Other Purchased Services												
11000	2200	55813	0000	Employee Travel - Non-Teachers										
11000	2200	55814	0000	Employee Training - Non-Teachers										
11000	2200	55818	0000	Other Travel - Non-Employees										
11000	2200	55914	0000	Contracts - Interagency										
11000	2200	55915	0000	Other Contract Services										
				Total: Other Purchased Services	\$0.00		\$0.00		\$0.00		\$0.00		\$0.00	
		Supplies												
11000	2200	56113	0000	Software										
11000	2200	56114	0000	Library And Audio-Visual	\$1,500.00		\$1,500.00		\$1,800.00		\$1,800.00		\$1,800.00	
11000	2200	56118	0000	General Supplies and Materials										
				Total: Supplies	\$1,500.00		\$1,500.00		\$1,800.00		\$1,800.00		\$1,800.00	
		Property												
11000	2200	57331	0000	Fixed Assets (more than \$5,000)										
11000	2200	57332	0000	Supply Assets (\$5,000 or less)										
				Total: Property	\$0.00		\$0.00		\$0.00		\$0.00		\$0.00	
11000	2200			TOTAL: SUPPORT SERVICES - INSTRUCTION	\$1,500.00	0.00	\$1,500.00	0.00	\$1,800.00	0.00	\$1,800.00	0.00	\$1,800.00	0.00

Charter's Five Year Budget Plan

					PROJ. AMT		PROJ. AMT		PROJ. AMT		PROJ. AMT		PROJ. AMT	
FUND	FUNCTION	OBJECT	JOB CLASS	OBJECT DESCRIPTION	(YEAR 1)	FTE	(YEAR 2)	FTE	(YEAR 3)	FTE	(YEAR 4)	FTE	(YEAR 5)	FTE
11000	EXPENDITURES													
	Function-2300 - General Administration													
		Personnel Services - Compensation												
11000	2300	51100	1113	Salaries Expense: Administrative Associates - Development/Outreach	\$17,500.00	0.50	\$18,025.00	0.50	\$27,037.50	.75	\$27,848.63	0.75	\$28,684.08	0.75
11000	2300	51100	1114	Salaries Expense: Administrative Assistants										
11000	2300	51100	1217	Salaries Expense: Secretary, Clerical, Technical Assistants										
11000	2300	51100	1511	Salaries Expense: Data Processing										
		Total: Personnel Services - Compensation			\$17,500.00	0.50	\$18,025.00	0.50	\$27,037.50	0.00	\$27,848.63	0.75	\$28,684.08	0.75
		Personnel Services - Employee Benefits												
11000	2300	52111	0000	Educational Retirement										
11000	2300	52112	0000	ERA - Retiree Health										
11000	2300	52210	0000	FICA Payments	\$1,338.75		\$1,378.91		\$2,068.37		\$2,130.42		\$2,194.33	
11000	2300	52220	0000	Medicare Payments										
11000	2300	52311	0000	Health and Medical Premiums										
11000	2300	52312	0000	Life										
11000	2300	52313	0000	Dental										
11000	2300	52314	0000	Vision										
11000	2300	52315	0000	Disability										
11000	2300	52316	0000	Other Insurance - SUI and SDI	\$358.00		\$368.50		\$548.75		\$564.97		\$581.68	
11000	2300	52500	0000	Unemployment Compensation										
11000	2300	52710	0000	Workers Compensation Premium										
11000	2300	52720	0000	Workers Compensation Employer's Fee										
11000	2300	52730	0000	Workers Compensation (Self Insured)										
11000	2300	52911	0000	Cafeteria Plan Fees										
11000	2300	52912	0000	Employee Assistance Programs										
11000	2300	52913	0000	Workers Compensation Employee Fees										
11000	2300	52914	0000	Deferred Sick Leave Reserve										
		Total: Personnel Services - Employee Benefits			\$1,696.75		\$1,747.41		\$2,617.12		\$2,695.39		\$2,776.01	
		Purchased Professional and Technical Services												
11000	2300	53411	0000	Auditing										
11000	2300	53412	0000	Bond/Board Elections										
11000	2300	53413	0000	Legal										
11000	2300	53414	0000	Other Professional Services										
11000	2300	53711	0000	Other Charges										
		Total: Purchased Professional and Tech Services			\$0.00		\$0.00		\$0.00		\$0.00		\$0.00	
		Other Purchased Services												
11000	2300	55400	0000	Advertising										
11000	2300	55811	0000	Board Travel										
11000	2300	55812	0000	Board Training										
11000	2300	55813	0000	Employee Travel - Non-Teachers										
11000	2300	55814	0000	Employee Training - Non-Teachers										
11000	2300	55818	0000	Other Travel - Non-Employees										
11000	2300	55914	0000	Contracts - Interagency										
11000	2300	55915	0000	Other Contract Services										
		Total: Other Purchased Services			\$0.00		\$0.00		\$0.00		\$0.00		\$0.00	
		Supplies												
11000	2300	56113	0000	Software										
11000	2300	56115	0000	Board Expenses										
11000	2300	56118	0000	General Supplies and Materials										
		Total: Supplies			\$0.00		\$0.00		\$0.00		\$0.00		\$0.00	
		Property												
11000	2300	57331	0000	Fixed Assets (more than \$5,000)										
11000	2300	57332	0000	Supply Assets (\$5,000 or less)										
		Total: Property			\$0.00		\$0.00		\$0.00		\$0.00		\$0.00	
11000	2300	TOTAL: GENERAL ADMINISTRATION			\$19,196.75	0.50	\$19,772.41	0.50	\$29,654.62	0.00	\$30,544.02	0.75	\$31,460.10	0.75
	Function-2400 - School Administration													
		Personnel Services - Compensation												
11000	2400	51100	1112	Salaries Expense: Principal	\$40,000.00	1.00	\$41,200.00	1.00	\$42,436.00	1.00	\$43,709.08	1.00	\$45,020.35	1.00
11000	2400	51100	1211	Salaries Expense: Coordinator/Subject Matter Specialist - Stipend										
11000	2400	51100	1217	Salaries Expense: Secretary, Clerical, Technical Assistants	\$15,000.00	0.60	\$15,450.00	0.60	\$23,250.00	0.75	\$23,947.50	0.75	\$31,930.00	1.00
11000	2400	51100	1511	Salaries Expense: Data Processing										
		Total: Personnel Services - Compensation			\$55,000.00	1.60	\$56,650.00	1.60	\$65,686.00	1.75	\$67,656.58	1.75	\$76,950.35	2.00

Charter's Five Year Budget Plan

FUND	FUNCTION	OBJECT	JOB CLASS	OBJECT DESCRIPTION	PROJ. AMT (YEAR 1)	FTE	PROJ. AMT (YEAR 2)	FTE	PROJ. AMT (YEAR 3)	FTE	PROJ. AMT (YEAR 4)	FTE	PROJ. AMT (YEAR 5)	FTE
11000	EXPENDITURES													
				Personnel Services - Employee Benefits										
11000	2400	52111	0000	Educational Retirement	\$1,200.00		\$1,236.00		\$1,273.08		\$1,311.27		\$2,308.51	
11000	2400	52112	0000	ERA - Retiree Health										
11000	2400	52210	0000	FICA Payments	\$4,207.50		\$4,333.73		\$5,024.98		\$5,175.73		\$5,886.70	
11000	2400	52220	0000	Medicare Payments										
11000	2400	52311	0000	Health and Medical Premiums	\$4,800.00		\$4,800.00		\$4,800.00		\$4,800.00		\$9,600.00	
11000	2400	52312	0000	Life										
11000	2400	52313	0000	Dental										
11000	2400	52314	0000	Vision										
11000	2400	52315	0000	Disability										
11000	2400	52316	0000	Other Insurance - SUI and SDI	\$760.80		\$769.80		\$927.00		\$940.95		\$1,102.60	
11000	2400	52500	0000	Unemployment Compensation										
11000	2400	52710	0000	Workers Compensation Premium										
11000	2400	52720	0000	Workers Compensation Employer's Fee										
11000	2400	52730	0000	Workers Compensation (Self Insured)										
11000	2400	52911	0000	Cafeteria Plan Fees										
11000	2400	52912	0000	Employee Assistance Programs										
11000	2400	52913	0000	Workers Compensation Employee Fees										
11000	2400	52914	0000	Deferred Sick Leave Reserve										
				Total: Personnel Services - Employee Benefits	\$10,968.30		\$11,139.53		\$12,025.06		\$12,227.95		\$18,897.81	
				Purchased Professional and Technical Services										
11000	2400	53414	0000	Other Professional Services - Curriculum Specialist Stipend	\$5,000.00		\$5,000.00		\$5,000.00		\$5,000.00		\$5,000.00	
11000	2400	53711	0000	Other Charges										
				Total: Purchased Professional and Technical Services	\$5,000.00		\$5,000.00		\$5,000.00		\$5,000.00		\$5,000.00	
				Other Purchased Services										
11000	2400	55813	0000	Employee Travel - Non-Teachers	\$300.00		\$500.00		\$500.00		\$500.00		\$500.00	
11000	2400	55814	0000	Employee Training - Non-Teachers	\$1,500.00		\$1,500.00		\$1,500.00		\$1,500.00		\$2,000.00	
11000	2400	55914	0000	Contracts - Interagency										
11000	2400	55915	0000	Other Contract Services										
				Total: Other Purchased Services	\$1,800.00		\$2,000.00		\$2,000.00		\$2,000.00		\$2,500.00	
				Supplies										
11000	2400	56113	0000	Software										
11000	2400	56118	0000	General Supplies and Materials										
				Total: Supplies	\$0.00		\$0.00		\$0.00		\$0.00		\$0.00	
				Property										
11000	2400	57331	0000	Fixed Assets (more than \$5,000)										
11000	2400	57332	0000	Supply Assets (\$5,000 or less)										
				Total: Property	\$0.00		\$0.00		\$0.00		\$0.00		\$0.00	
11000	2400			TOTAL: SCHOOL ADMINISTRATION	\$72,768.30	1.60	\$74,789.53	1.60	\$84,711.06	1.75	\$86,884.53	1.75	\$103,348.16	2.00
	Function-2500 - Central Services													
				Personnel Services - Compensation										
11000	2500	51100	1113	Salaries Expense: Administrative Associates - Development/Outreach										
11000	2500	51100	1114	Salaries Expense: Administrative Assistants										
11000	2500	51100	1115	Salaries Expense: Assoc. Supt.-Fin./Business Manager										
11000	2500	51100	1217	Salaries Expense: Secretary, Clerical, Technical Assistants										
11000	2500	51100	1220	Salaries Expense: Business Office Support										
11000	2500	51100	1511	Salaries Expense: Data Processing										
				Total: Personnel Services - Compensation	\$0.00	0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	0.00
				Personnel Services - Employee Benefits										
11000	2500	52111	0000	Educational Retirement										
11000	2500	52112	0000	ERA - Retiree Health										
11000	2500	52210	0000	FICA Payments										
11000	2500	52220	0000	Medicare Payments										
11000	2500	52311	0000	Health and Medical Premiums										
11000	2500	52312	0000	Life										
11000	2500	52313	0000	Dental										
11000	2500	52314	0000	Vision										
11000	2500	52315	0000	Disability										
11000	2500	52316	0000	Other Insurance										
11000	2500	52500	0000	Unemployment Compensation										
11000	2500	52710	0000	Workers Compensation Premium										
11000	2500	52720	0000	Workers Compensation Employer's Fee										
11000	2500	52730	0000	Workers Compensation (Self Insured)										
11000	2500	52911	0000	Cafeteria Plan Fees										
11000	2500	52912	0000	Employee Assistance Programs										
11000	2500	52913	0000	Workers Compensation Employee Fees										
11000	2500	52914	0000	Deferred Sick Leave Reserve										

Charter's Five Year Budget Plan

FUND	FUNCTION	OBJECT	JOB CLASS	OBJECT DESCRIPTION	PROJ. AMT (YEAR 1)	FTE	PROJ. AMT (YEAR 2)	FTE	PROJ. AMT (YEAR 3)	FTE	PROJ. AMT (YEAR 4)	FTE	PROJ. AMT (YEAR 5)	FTE
11000	EXPENDITURES													
Total: Personnel Services - Employee Benefits					\$0.00		\$0.00		\$0.00		\$0.00		\$0.00	

FUND	FUNCTION	OBJECT	JOB CLASS	OBJECT DESCRIPTION	PROJ. AMT (YEAR 1)	FTE	PROJ. AMT (YEAR 2)	FTE	PROJ. AMT (YEAR 3)	FTE	PROJ. AMT (YEAR 4)	FTE	PROJ. AMT (YEAR 5)	FTE
11000	EXPENDITURES													
		Purchased Professional and Technical Services												
11000	2500	53414	0000	Other Professional Services - Contracted Business Services/Consulting	\$50,000.00		\$50,000.00		\$50,000.00		\$52,000.00		\$52,000.00	
11000	2500	53711	0000	Other Charges										
				Total: Purchased Professional and Technical Services	\$50,000.00		\$50,000.00		\$50,000.00		\$52,000.00		\$52,000.00	
		Other Purchased Services												
11000	2500	55400	0000	Advertising	\$2,500.00		\$2,500.00		\$2,500.00		\$2,500.00		\$2,500.00	
11000	2500	55813	0000	Employee Travel - Non-Teachers	\$300.00		\$500.00		\$500.00		\$500.00		\$500.00	
11000	2500	55814	0000	Employee Training - Non-Teachers	\$1,500.00		\$2,000.00		\$2,000.00		\$2,000.00		\$2,000.00	
11000	2500	55914	0000	Contracts - Interagency										
11000	2500	55915	0000	Other Contract Services										
				Total: Other Purchased Services	\$4,300.00		\$5,000.00		\$5,000.00		\$5,000.00		\$5,000.00	
		Supplies												
11000	2500	56113	0000	Software										
11000	2500	56118	0000	General Supplies and Materials										
				Total: Supplies	\$0.00		\$0.00		\$0.00		\$0.00		\$0.00	
		Property												
11000	2500	57331	0000	Fixed Assets (more than \$5,000)										
11000	2500	57332	0000	Supply Assets (\$5,000 or less)										
				Total: Property	\$0.00		\$0.00		\$0.00		\$0.00		\$0.00	
11000	2500			TOTAL: CENTRAL SERVICES	\$54,300.00	0.00	\$55,000.00	0.00	\$55,000.00	0.00	\$57,000.00	0.00	\$57,000.00	0.00
	Function-2600 - Operation and Maintenance of Plant													
		Personnel Services - Compensation												
11000	2600	51100	1113	Salaries Expense: Administrative Associates										
11000	2600	51100	1114	Salaries Expense: Administrative Assistants										
11000	2600	51100	1217	Salaries Expense: Secretary, Clerical, Technical Assistants										
11000	2600	51100	1219	Salaries Expense: Duty Personnel										
11000	2600	51100	1614	Salaries Expense: Maintenance										
11000	2600	51100	1615	Salaries Expense: Custodial	\$10,000.00	0.50	\$10,300.00	0.50	\$10,609.00	0.50	\$15,913.50	0.75	\$16,390.91	0.75
11000	2600	51100	1623	Salaries Expense: Crosswalk Guards										
				Total: Personnel Services - Compensation	\$10,000.00	0.50	\$10,300.00	0.50	\$10,609.00	0.50	\$15,913.50	0.75	\$16,390.91	0.75
		Personnel Services - Employee Benefits												
11000	2600	52111	0000	Educational Retirement										
11000	2600	52112	0000	ERA - Retiree Health										
11000	2600	52210	0000	FICA Payments	\$765.00		\$787.95		\$811.59		\$1,217.38		\$1,253.90	
11000	2600	52220	0000	Medicare Payments										
11000	2600	52311	0000	Health and Medical Premiums										
11000	2600	52312	0000	Life										
11000	2600	52313	0000	Dental										
11000	2600	52314	0000	Vision										
11000	2600	52315	0000	Disability										
11000	2600	52316	0000	Other Insurance										
11000	2600	52500	0000	Unemployment Compensation										
11000	2600	52710	0000	Workers Compensation Premium										
11000	2600	52720	0000	Workers Compensation Employer's Fee										
11000	2600	52730	0000	Workers Compensation (Self Insured)										
11000	2600	52911	0000	Cafeteria Plan Fees										
11000	2600	52912	0000	Employee Assistance Programs										
11000	2600	52913	0000	Workers Compensation Employee Fees										
11000	2600	52914	0000	Deferred Sick Leave Reserve										
				Total: Personnel Services - Employee Benefits	\$765.00		\$787.95		\$811.59		\$1,217.38		\$1,253.90	
		Purchased Professional and Technical Services												
11000	2600	53711	0000	Other Charges										
				Total: Purchased Professional and Tech Services	\$0.00		\$0.00		\$0.00		\$0.00		\$0.00	
		Purchased Property Services												
11000	2600	54311	0000	Maintenance & Repair - Furniture/Fixtures/Equipment										
11000	2600	54312	0000	Maintenance & Repair - Buildings and Grounds										
11000	2600	54313	0000	Maintenance & Repair - Vehicles										
11000	2600	54411	0000	Electricity										
11000	2600	54412	0000	Natural Gas (Buildings)										
11000	2600	54413	0000	Propane/Butane (Buildings)										
11000	2600	54414	0000	Other Energy (Buildings)										
11000	2600	54415	0000	Water/Sewage										
11000	2600	54416	0000	Communication Services										
11000	2600	54610	0000	Rental - Land and Buildings										
11000	2600	54620	0000	Rental - Equipment and Vehicles										
11000	2600	54630	0000	Rental - Computers and Related Equipment										
				Total: Purchased Property Services	\$0.00		\$0.00		\$0.00		\$0.00		\$0.00	

Charter's Five Year Budget Plan

FUND	FUNCTION	OBJECT	JOB CLASS	OBJECT DESCRIPTION	PROJ. AMT (YEAR 1)	FTE	PROJ. AMT (YEAR 2)	FTE	PROJ. AMT (YEAR 3)	FTE	PROJ. AMT (YEAR 4)	FTE	PROJ. AMT (YEAR 5)	FTE
11000	EXPENDITURES													
				Other Purchased Services										
11000	2600	55200	0000	Property/Liability Insurance										
11000	2600	55813	0000	Employee Travel - Non-Teachers										
11000	2600	55814	0000	Employee Training - Non-Teachers										
11000	2600	55914	0000	Contracts - Interagency										
11000	2600	55915	0000	Other Contract Services										
				Total: Other Purchased Services	\$0.00		\$0.00		\$0.00		\$0.00		\$0.00	
				Supplies										
11000	2600	56113	0000	Software										
11000	2600	56118	0000	General Supplies and Materials	\$2,500.00		\$2,500.00		\$3,000.00		\$3,500.00		\$4,000.00	
11000	2600	56210	0000	Natural Gas (Vehicles)										
11000	2600	56211	0000	Gasoline										
11000	2600	56212	0000	Diesel Fuel										
11000	2600	56213	0000	Propane (Vehicles)										
11000	2600	56214	0000	Lubricants/Anti-Freeze										
11000	2600	56215	0000	Tires/Tubes										
11000	2600	56216	0000	Maintenance Supplies/Parts										
				Total: Supplies	\$2,500.00		\$2,500.00		\$3,000.00		\$3,500.00		\$4,000.00	
				Property										
11000	2600	57331	0000	Fixed Assets (more than \$5,000)										
11000	2600	57332	0000	Supply Assets (\$5,000 or less)										
				Total: Property	\$0.00		\$0.00		\$0.00		\$0.00		\$0.00	
11000	2600			TOTAL: OPERATION AND MAINTENANCE OF PLANT	\$13,265.00	0.50	\$13,587.95	0.50	\$14,420.59	0.50	\$20,630.88	0.75	\$21,644.81	0.75
	Function-2700 - Student Transportation													
				Personnel Services - Compensation										
11000	2700	51100	1113	Salaries Expense: Administrative Associates										
11000	2700	51100	1114	Salaries Expense: Administrative Assistants										
11000	2700	51100	1217	Salaries Expense: Secretary, Clerical, Technical Assistants										
11000	2700	51100	1319	Salaries Expense: Special Ed. Assistants										
				Total: Personnel Services - Compensation	\$0.00	0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	0.00
				Personnel Services - Employee Benefits										
11000	2700	52111	0000	Educational Retirement										
11000	2700	52112	0000	ERA - Retiree Health										
11000	2700	52210	0000	FICA Payments										
11000	2700	52220	0000	Medicare Payments										
11000	2700	52311	0000	Health and Medical Premiums										
11000	2700	52312	0000	Life										
11000	2700	52313	0000	Dental										
11000	2700	52314	0000	Vision										
11000	2700	52315	0000	Disability										
11000	2700	52316	0000	Other Insurance										
11000	2700	52500	0000	Unemployment Compensation										
11000	2700	52710	0000	Workers Compensation Premium										
11000	2700	52720	0000	Workers Compensation Employer's Fee										
11000	2700	52730	0000	Workers Compensation (Self Insured)										
11000	2700	52911	0000	Cafeteria Plan Fees										
11000	2700	52912	0000	Employee Assistance Programs										
11000	2700	52913	0000	Workers Compensation Employee Fees										
11000	2700	52914	0000	Deferred Sick Leave Reserve										
				Total: Personnel Services - Employee Benefits	\$0.00		\$0.00		\$0.00		\$0.00		\$0.00	
				Purchased Professional and Technical Services										
11000	2700	53711	0000	Other Charges										
				Total: Purchased Professional and Technical Services	\$0.00		\$0.00		\$0.00		\$0.00		\$0.00	
				Purchased Property Services										
11000	2700	55111	0000	Transportation Per-Capita Feeders										
11000	2700	55112	0000	Transportation Contractors										
				Total: Purchased Property Services	\$0.00		\$0.00		\$0.00		\$0.00		\$0.00	
11000	2700			TOTAL: STUDENT TRANSPORTATION	\$0.00	0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	0.00
11000	2000			TOTAL: SUPPORT SERVICES	\$178,530.05	2.60	\$185,149.89	2.60	\$212,086.27	2.25	\$224,359.43	3.25	\$245,253.07	3.50

Charter's Five Year Budget Plan

FUND	FUNCTION	OBJECT	JOB CLASS	OBJECT DESCRIPTION	PROJ. AMT (YEAR 1)	FTE	PROJ. AMT (YEAR 2)	FTE	PROJ. AMT (YEAR 3)	FTE	PROJ. AMT (YEAR 4)	FTE	PROJ. AMT (YEAR 5)	FTE
11000	EXPENDITURES													
	Function-3100 - Food Service Operations													
				Personnel Services - Compensation										
11000	3100	51100	1113	Salaries Expense: Administrative Associates										
11000	3100	51100	1114	Salaries Expense: Administrative Assistants										
11000	3100	51100	1217	Salaries Expense: Secretary, Clerical, Technical Assistants										
11000	3100	51100	1617	Salaries Expense: Food Service										
				Total: Personnel Services - Compensation	\$0.00	0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	0.00
				Personnel Services - Employee Benefits										
11000	3100	52111	0000	Educational Retirement										
11000	3100	52112	0000	ERA - Retiree Health										
11000	3100	52210	0000	FICA Payments										
11000	3100	52220	0000	Medicare Payments										
11000	3100	52311	0000	Health and Medical Premiums										
11000	3100	52312	0000	Life										
11000	3100	52313	0000	Dental										
11000	3100	52314	0000	Vision										
11000	3100	52315	0000	Disability										
11000	3100	52316	0000	Other Insurance										
11000	3100	52500	0000	Unemployment Compensation										
11000	3100	52710	0000	Workers Compensation Premium										
11000	3100	52720	0000	Workers Compensation Employer's Fee										
11000	3100	52730	0000	Workers Compensation (Self Insured)										
11000	3100	52911	0000	Cafeteria Plan Fees										
11000	3100	52912	0000	Employee Assistance Programs										
11000	3100	52913	0000	Workers Compensation Employee Fees										
11000	3100	52914	0000	Deferred Sick Leave Reserve										
				Total: Personnel Services - Employee Benefits	\$0.00		\$0.00		\$0.00		\$0.00		\$0.00	
	Function-3100 - Food Service Operations													
				Purchased Professional and Technical Services										
11000	3100	53411	0000	Auditing										
11000	3100	53413	0000	Legal										
11000	3100	53414	0000	Other Professional Services										
11000	3100	53711	0000	Other Charges										
				Total: Purchased Professional and Tech Services	\$0.00		\$0.00		\$0.00		\$0.00		\$0.00	
				Purchased Property Services										
11000	3100	54311	0000	Maintenance & Repair - Furniture/Fixtures/Equipment										
11000	3100	54312	0000	Maintenance & Repair - Buildings and Grounds										
11000	3100	54313	0000	Maintenance & Repair - Vehicles										
11000	3100	54411	0000	Electricity										
11000	3100	54412	0000	Natural Gas (Buildings)										
11000	3100	54413	0000	Propane/Butane (Buildings)										
11000	3100	54414	0000	Other Energy (Buildings)										
11000	3100	54415	0000	Water/Sewage										
11000	3100	54416	0000	Communication Services										
11000	3100	54610	0000	Rental - Land and Buildings										
11000	3100	54620	0000	Rental - Equipment and Vehicles										
11000	3100	54630	0000	Rental - Computers and Related Equipment										
				Total: Purchased Property Services	\$0.00		\$0.00		\$0.00		\$0.00		\$0.00	
				Other Purchased Services										
11000	3100	55813	0000	Employee Travel - Non-Teachers										
11000	3100	55814	0000	Employee Training - Non-Teachers										
11000	3100	55914	0000	Contracts - Interagency										
11000	3100	55915	0000	Other Contract Services										
				Total: Other Purchased Services	\$0.00		\$0.00		\$0.00		\$0.00		\$0.00	
				Supplies										
11000	3100	56113	0000	Software										
11000	3100	56116	0000	Food										
11000	3100	56117	0000	Non-Food										
11000	3100	56118	0000	General Supplies and Materials										
				Total: Supplies	\$0.00		\$0.00		\$0.00		\$0.00		\$0.00	
				Property										
11000	3100	57331	0000	Fixed Assets (more than \$5,000)										
11000	3100	57332	0000	Supply Assets (\$5,000 or less)										
				Total: Property	\$0.00		\$0.00		\$0.00		\$0.00		\$0.00	
11000	3100			TOTAL: FOOD SERVICES OPERATIONS	\$0.00	0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	0.00

Charter's Five Year Budget Plan

FUND	FUNCTION	OBJECT	JOB CLASS	OBJECT DESCRIPTION	PROJ. AMT (YEAR 1)	FTE	PROJ. AMT (YEAR 2)	FTE	PROJ. AMT (YEAR 3)	FTE	PROJ. AMT (YEAR 4)	FTE	PROJ. AMT (YEAR 5)	FTE
11000	EXPENDITURES													
	Function-3300 - Community Services Operations													
				Personnel Services - Compensation										
11000	3300	51100	1619	Salaries Expense: Adult Education										
11000	3300	51100	1620	Salaries Expense: Recreation										
11000	3300	51100	1621	Salaries Expense: Summer School/After School										
11000	3300	51100	1622	Salaries Expense: Bus Drivers										
11000	3300	51100	1625	Salaries Expense: Extended Services to Students										
				Total: Personnel Services - Compensation	\$0.00	0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	0.00
				Personnel Services - Employee Benefits										
11000	3300	52111	0000	Educational Retirement										
11000	3300	52112	0000	ERA - Retiree Health										
11000	3300	52210	0000	FICA Payments										
11000	3300	52220	0000	Medicare Payments										
11000	3300	52311	0000	Health and Medical Premiums										
11000	3300	52312	0000	Life										
11000	3300	52313	0000	Dental										
11000	3300	52314	0000	Vision										
11000	3300	52315	0000	Disability										
11000	3300	52316	0000	Other Insurance										
11000	3300	52500	0000	Unemployment Compensation										
11000	3300	52710	0000	Workers Compensation Premium										
11000	3300	52720	0000	Workers Compensation Employer's Fee										
11000	3300	52730	0000	Workers Compensation (Self Insured)										
11000	3300	52911	0000	Cafeteria Plan Fees										
11000	3300	52912	0000	Employee Assistance Programs										
11000	3300	52913	0000	Workers Compensation Employee Fees										
11000	3300	52914	0000	Deferred Sick Leave Reserve										
				Total: Personnel Services - Employee Benefits	\$0.00		\$0.00		\$0.00		\$0.00		\$0.00	
				Other Purchased Services										
11000	3300	55200	0000	Property/Liability Insurance										
11000	3300	55813	0000	Employee Travel - Non-Teachers										
11000	3300	55814	0000	Employee Training - Non-Teachers										
11000	3300	55817	0000	Student Travel										
11000	3300	55818	0000	Other Travel - Non-Employees										
11000	3300	55914	0000	Contracts - Interagency										
11000	3300	55915	0000	Other Contract Services										
				Total: Other Purchased Services	\$0.00		\$0.00		\$0.00		\$0.00		\$0.00	
				Supplies										
11000	3300	56118	0000	General Supplies and Materials										
				Total: Supplies	\$0.00		\$0.00		\$0.00		\$0.00		\$0.00	
11000	3300			TOTAL: COMMUNITY SERVICES OPERATIONS	\$0.00	0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	0.00
11000	3000			TOTAL: OPERATION OF NON-INSTRUCTIONAL SERVICES	\$0.00	0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	0.00
11000				TOTAL: OPERATIONAL FUND	\$738,036.55	14.10	\$866,059.99	16.10	\$1,058,590.27	18.75	\$1,194,127.51	21.50	\$1,298,200.66	22.75

Whole Child Rubric for Grades 1 - 8

1st Grade Student Report

Student's Name: _____ School Year: _____

Class Teacher: _____

Skill Areas	Symbol	Symbol Key: E = Exceeds Standards M = Meets Standards P = Progressing Towards Standards B = Below Standards
Social Skills		Comments:
Interacts Well with Peers		
Cooperates with Teacher/s		
Controls Impulsivity		
Work Habits		
Listens Attentively		
Follows Directions		
Participation		
Works Independently		
Uses Time Productively		
Is Neat and Organized		
Cares for Classroom and Materials		
Artistic Work		
Music		
Painting/Drawing		
Modeling		

Student's Name _____ Grade 2

Skill Areas	Symbol Key: E = Exceeds Standards M = Meets Standards P = Progressing Towards Standards B = Below Standards
Language Arts	Comments:
Recognizes Letters	
Matches Sounds to Letters	
Writes Own Words	
Writes Own Sentences	
Comprehension	
Reading	
Speech	
Handwriting	
Form Drawing	
Mathematics	
Knows and Writes Numbers 1-100	
Counts by 2,3,5,10	
Adds/ Subtracts Accurately	
Social Studies	
Science	

Student's Name _____ Grade 2

Skill Areas		Symbol Key: E = Exceeds Standards M = Meets Standards P = Progressing Towards Standards B = Below Standards
		Comments:
Handwork		Teacher –
Participation		
Achievement		
Spanish		Teacher -
Participation		
Achievement		

2nd Grade Student Report

Student's Name: _____ School Year: _____

Class Teacher: _____

Skill Areas	Symbol	Symbol Key: E = Exceeds Standards M = Meets Standards P = Progressing Towards Standards B = Below Standards
Social Skills		Comments:
Interacts Well with Peers		
Cooperates with Teacher/s		
Controls Impulsivity		
Work Habits		
Listens Attentively		
Follows Directions		
Participation		
Works Independently		
Uses Time Productively		
Is Neat and Organized		
Cares for Classroom and Materials		
Artistic Work		
Music		
Painting/Drawing		
Modeling		

Student's Name _____ Grade 2

Skill Areas	Symbol Key: E = Exceeds Standards M = Meets Standards P = Progressing Towards Standards B = Below Standards
Language Arts	Comments:
Writes Own Sentences	
Written Expression	
Comprehension	
Reading	
Speech	
Handwriting	
Form Drawing	
Mathematics	
Knows and Writes Numbers 1 - 1000	
Knows Basic Facts	
Computes Accurately	
Solves Word Problems	
Understands Concepts	
Science	
Nature Studies	

Student's Name _____ Grade 2

Skill Areas	Symbol Key: E = Exceeds Standards M = Meets Standards P = Progressing Towards Standards B = Below Standards
	Comments:
Handwork	Teacher --
Participation	
Achievement	
Eurythmy	Teacher -
Participation	
Achievement	

3rd Grade Student Report

Student's Name: _____ School Year: _____

Class Teacher: _____

Skill Areas	Symbol	Symbol Key: E = Exceeds Standards M = Meets Standards P = Progressing Towards Standards B = Below Standards
Social Skills		Comments:
Interacts Well with Peers		
Cooperates with Teacher/s		
Controls Impulsivity		
Work Habits		
Listens Attentively		
Follows Directions		
Participation		
Works Independently		
Uses Time Productively		
Is Neat and Organized		
Cares for Classroom and Materials		
Artistic Work		
Music		
Painting/Drawing		
Modeling		
Effort		

Student's Name _____ Grade 3

Skill Areas	Symbol Key: E = Exceeds Standards M = Meets Standards P = Progressing Towards Standards B = Below Standards
Language Arts	Comments:
Reading	
Comprehension	
Speech	
Expresses Ideas Through Writing	
Grammar/Mechanics	
Spelling	
Handwriting	
Form Drawing	
Effort	
Mathematics	
Knows Numbers to 10,000	
Knows Basic Facts	
Computes Accurately	
Solves Word Problems	
Understands Concepts	
Effort	
Science	
Social Studies/History	
Homework	
Projects	

Student's Name _____ Grade 3

Skill Areas	Symbol	Symbol Key: E = Exceeds Standards M = Meets Standards P = Progressing Towards Standards B = Below Standards
		Comments:
Handwork		Teacher –
Participation		
Achievement		
Spanish		
Participation		
Achievement		
Games		
Participation		
Achievement		
Eurythmy		
Participation		
Achievement		

4th Grade Student Report

Student's Name: _____ **School Year:** _____

Class Teacher: _____

Skill Areas	Symbol	Symbol Key: E = Exceeds Standards M = Meets Standards P = Progressing Towards Standards B = Below Standards
Social Skills		Comments:
Interacts Well with Peers		
Cooperates with Teacher/s		
Controls Impulsivity		
Work Habits		
Listens Attentively		
Follows Directions		
Participation		
Works Independently		
Uses Time Productively		
Is Neat and Organized		
Artistic Work		
Music		
Painting/Drawing		
Modeling		
Effort		

Student's Name _____ Grade 4

Skill Areas	Symbol Key: E = Exceeds Standards M = Meets Standards P = Progressing Towards Standards B = Below Standards
Language Arts	Comments:
Reading	
Comprehension	
Speech	
Expresses Ideas Through Writing	
Grammar/Mechanics	
Spelling	
Handwriting	
Form Drawing	
Effort	
Mathematics	
Knows Basic Facts	
Computes Accurately	
Solves Word Problems	
Understands Concepts	
Effort	
Science	
Social Studies/History	
Homework	
Projects	

Student's Name _____ Grade 4

Skill Areas	Symbol Key: E = Exceeds Standards M = Meets Standards P = Progressing Towards Standards B = Below Standards
	Comments:
Handwork	Teacher --
Participation	
Achievement	
Strings	Teacher-
Participation	
Achievement	
Eurythmy	Teacher-
Participation	
Achievement	
Games	Teacher-
Participation	
Achievement	
Cello	Teacher-
Participation	
Achievement	

Student's Name _____ Grade 4

5th Grade Student Report

Student's Name: _____ School Year: _____

Class Teacher: _____

Skill Areas	Symbol	Symbol Key: E = Exceeds Standards M = Meets Standards P = Progressing Towards Standards B = Below Standards
Social Skills		Comments:
Interacts Well with Peers		
Controls Impulsivity		
Cooperates with Teacher/s		
Cares for Classroom and Materials		
Accepts Responsibility for Actions		
Work Habits		
Listens Attentively		
Follows Directions		
Participation		
Works Independently		
Uses Time Productively		
Is Neat and Organized		
Artistic Work		
Music		
Painting/Drawing		
Modeling		
Form Drawing		
Effort		

Student Name: _____ Grade 5

Skill Areas		Symbol Key: E = Exceeds Standards M = Meets Standards P = Progressing Towards Standards B = Below Standards
Language Arts		
Reads Fluently and with Expression		
Comprehension		
Speech		
Written Expression		
Grammar/Mechanics		
Spelling		
Handwriting		
Form Drawing		
Effort		
Mathematics		
Computes Accurately		
Solves Word Problems		
Understands Concepts		
Effort		
Skill Areas		Symbol Key: E = Exceeds Standards M = Meets Standards P = Progressing Towards Standards B = Below Standards

Student Name: _____ Grade 5

Ancient History	
Achievement	
Effort	
Geometry	
Achievement	
Effort	
Unites States Geography	
Achievement	
Effort	
Greek Mythology	
Achievement	
Effort	
Greek History	
Achievement	
Effort	
Botany	
Achievement	
Effort	
Project	
Book Reports	
Homework	

Student Name: _____ Grade 5

Skill Areas		Symbol Key: E = Exceeds Standards M = Meets Standards P = Progressing Towards Standards B = Below Standards
		Comments:
Spanish		Teacher –
Achievement		
Participation		
Games		Teacher –
Achievement		
Participation		
Handwork		Teacher –
Achievement		
Participation		
Music		Teacher –
Achievement		
Participation		

6th Grade Student Report

Student's Name: _____ School Year: _____

Class Teacher: _____

Skill Areas	Symbol	Symbol Key: A = Advanced P = Proficient B = Basic BB = Below Basic C = Credit FB = Far Below Basic NC = No Credit
Personal Development		Comments:
Interacts Positively with Peers		
Controls Impulsivity		
Accepts responsibility for actions		
Cooperates with Teacher		
Work Habits		
Listens Attentively		
Shows Initiative		
Works Independently / Stays on Task		
Is Neat and Organized		
Completes Homework on Time		
Mathematics		
Estimation, Percents, and Factoring		
Operations with Fractions and Decimals		
Algebra and Functions		
Measurement and Geometry		
Statistics, Data Analysis and Probability		

Student's Name _____ Grade 6

Skill Areas		Symbol Key: A = Advanced P = Proficient B = Basic BB = Below Basic C = Credit FB = Far Below Basic NC = No Credit
Language Arts		Comments:
Book Reports		
Written Expression		
Grammar / Mechanics		
Comprehends Text		
Reading Fluency		
Technology		
Participation / Effort		
Achievement		
Artistic Work		
Speech		
Singing		
Drawing / Painting		
Handwriting		
Electives		

Student's Name _____

Grade 6

Skill Areas	Symbol Key: A = Advanced P = Proficient B = Basic BB = Below Basic C = Credit FB = Far Below Basic NC = No Credit
Main Lesson Blocks	Comments:
I.	
Participation / Effort	
Achievement	
II.	
Participation / Effort	
Achievement	
III.	
Participation / Effort	
Achievement	
IV.	
Participation / Effort	
Achievement	

Student's Name _____ Grade 6

Skill Areas	Symbol Key: A = Advanced P = Proficient B = Basic BB = Below Basic C = Credit FB = Far Below Basic NC = No Credit				
Main Lesson Blocks cont'd	Comments:				
V.					
Participation / Effort					
Achievement					
VI.					
Participation / Effort					
Achievement					
VII.					
Participation / Effort					
Achievement					
VIII.					
Participation / Effort					
Achievement					

Student's Name _____ Grade 6

Skill Areas	Symbol Key: A = Advanced P = Proficient B = Basic BB = Below Basic C = Credit FB = Far Below Basic NC = No Credit
Main Lesson Blocks cont'd	Comments:
IX.	
Participation / Effort	
Achievement	
X.	
Participation / Effort	
Achievement	
XI.	
Participation / Effort	
Achievement	
XII.	
Participation / Effort	
Achievement	

Student's Name _____ Grade 6

Skill Areas		Symbol Key: A = Advanced P = Proficient B = Basic BB = Below Basic C = Credit FB = Far Below Basic NC = No Credit
		Comments
Spanish		Teacher –
Participation		
Achievement		
Handwork		Teacher –
Participation		
Achievement		
Math		Teacher –
Participation		
Achievement		
Games		Teacher –
Participation		
Achievement		
Music		Teacher –
Participation		
Achievement		

7th Grade Student Report

Student's Name: _____ School Year: _____

Class Teacher: _____

Skill Areas	Symbol	Symbol Key: A = Advanced P = Proficient B = Basic BB = Below Basic C = Credit FB = Far Below Basic NC = No Credit
Personal Development		Comments:
Interacts Positively with Peers		
Controls Impulsivity		
Accepts responsibility for actions		
Cooperates with Teacher		
Work Habits		
Listens Attentively		
Shows Initiative		
Works Independently / Stays on Task		
Is Neat and Organized		
Completes Homework on Time		
Mathematics		
Estimation/ Percents and Factoring		
Operations with Fractions and Decimals		
Algebra and Functions		
Measurement and Geometry		
Statistics, Data Analysis, and Probability		

Student's Name _____ Grade 7

Skill Areas	Symbol Key: A = Advanced P = Proficient B = Basic BB = Below Basic C = Credit FB = Far Below Basic NC = No Credit
Language Arts	Comments:
Book Reports	
Written Expression	
Grammar / Mechanics	
Comprehends Text	
Reading Fluency	
Technology	
Participation / Effort	
Achievement	
Artistic Work	
Speech	
Singing	
Drawing / Painting	
Handwriting	
Electives	

Student's Name _____ Grade 7

Skill Areas	Symbol Key: A = Advanced P = Proficient B = Basic BB = Below Basic C = Credit FB = Far Below Basic NC = No Credit
Main Lesson Blocks	Comments:
I.	
Participation / Effort	
Achievement	
II.	
Participation / Effort	
Achievement	
III.	
Participation / Effort	
Achievement	
IV.	
Participation / Effort	
Achievement	

Student's Name _____ Grade 7

Skill Areas	Symbol Key: A = Advanced P = Proficient B = Basic BB = Below Basic C = Credit FB = Far Below Basic NC = No Credit
Main Lesson Blocks cont'd	Comments:
V.	
Participation / Effort	
Achievement	
VI.	
Participation / Effort	
Achievement	
VII.	
Participation / Effort	
Achievement	
VIII.	
Participation / Effort	
Achievement	

Student's Name _____ Grade 7

Skill Areas	Symbol Key: A = Advanced P = Proficient B = Basic BB = Below Basic C = Credit FB = Far Below Basic NC = No Credit
Main Lesson Blocks cont'd	Comments:
IX.	
Participation / Effort	
Achievement	
X.	
Participation / Effort	
Achievement	
XI.	
Participation / Effort	
Achievement	
XII.	
Participation / Effort	
Achievement	

Student's Name _____ Grade 7

Skill Areas		Symbol Key: A = Advanced P = Proficient B = Basic BB = Below Basic C = Credit FB = Far Below Basic NC = No Credit
		Comments
Spanish		Teacher –
Participation		
Achievement		
Handwork		Teacher –
Participation		
Achievement		
Math		Teacher –
Participation		
Achievement		
Games		Teacher –
Participation		
Achievement		
Music		Teacher –
Participation		
Achievement		

8th Grade Student Report

Student's Name: _____ School Year: _____

Class Teacher: _____

Skill Areas	Symbol	Symbol Key: A = Advanced P = Proficient B = Basic BB = Below Basic C = Credit FB = Far Below Basic NC = No Credit
Personal Development		Comments:
Interacts Positively with Peers		
Controls Impulsivity		
Accepts responsibility for actions		
Cooperates with Teacher		
Work Habits		
Listens Attentively		
Shows Initiative		
Works Independently / Stays on Task		
Is Neat and Organized		
Completes Homework on Time		
Mathematics		
Estimation, Percents and Factoring		
Operations with Fractions and Decimals		
Algebra and Functions		
Measurement and Geometry		
Statistics, Data Analysis and Probability		

Student's Name _____ Grade 8

Skill Areas	SPRING	
Language Arts		Comments:
Book Reports		
Written Expression		
Grammar / Mechanics		
Comprehends Text		
Reading Fluency		
Technology		
Participation / Effort		
Achievement		
Artistic Work		
Speech		
Singing		
Drawing / Painting		
Handwriting		
Electives		

Student's Name _____

Grade 8

Skill Areas	SPRING	
Main Lesson Blocks		Comments:
I.		
Participation/Effort		
Achievement		
II.		
Participation / Effort		
Achievement		
III.		
Participation / Effort		
Achievement		
IV.		
Participation / Effort		
Achievement		

Student's Name _____ Grade 8

Skill Areas	SPRING	Comments:
Main Lesson Blocks Cont'd		
V.		
Participation / Effort		
Achievement		
VI.		
Participation / Effort		
Achievement		
VII.		
Participation / Effort		
Achievement		
VIII.		
Participation / Effort		
Achievement		

Student's Name _____ Grade 8

Skill Areas	SPRING	Comments:
IX.		
Participation / Effort		
Achievement		
X.		
Participation / Effort		
Achievement		
XI.		
Participation / Effort		
Achievement		
XII.		
Participation / Effort		
Achievement		

Student's Name _____ Grade 8

Skill Areas	Symbol Key: A = Advanced P = Proficient B = Basic BB = Below Basic C = Credit FB = Far Below Basic NC = No Credit
	Comments
Spanish	Teacher –
Participation	
Achievement	
Handwork	Teacher –
Participation	
Achievement	
Math	Teacher -
Participation	
Achievement	
Games	Teacher –
Participation	
Achievement	
Music	Teacher –
Participation	
Achievement	



Taos Mountain Charter School Charter Application

Submitted to the State of New Mexico
Public Education Department

June 21, 2012

Allison Bradley and Emily Cohen, Founders

Mountain Sage Community School

5th Grade Student Report

Student's Name: _____ School Year: _____

Class Teacher: _____

Skill Areas	Symbol	Symbol Key: E = Exceeds Standards M = Meets Standards P = Progressing Towards Standards B = Below Standards
Social Skills		Comments:
Interacts Well with Peers		
Controls Impulsivity		
Cooperates with Teacher/s		
Cares for Classroom and Materials		
Accepts Responsibility for Actions		
Work Habits		
Listens Attentively		
Follows Directions		
Participation		
Works Independently		
Uses Time Productively		
Is Neat and Organized		
Artistic Work		
Music		
Painting/Drawing		
Modeling		
Form Drawing		
Effort		

Student Name: _____ Grade 5

Skill Areas		Symbol Key: E = Exceeds Standards M = Meets Standards P = Progressing Towards Standards B = Below Standards
Language Arts		
Reads Fluently and with Expression		
Comprehension		
Speech		
Written Expression		
Grammar/Mechanics		
Spelling		
Handwriting		
Form Drawing		
Effort		
Mathematics		
Computes Accurately		
Solves Word Problems		
Understands Concepts		
Effort		
Skill Areas		Symbol Key: E = Exceeds Standards M = Meets Standards P = Progressing Towards Standards B = Below Standards

Waldorf Mathematic Standards & Rubric, Grades 1 – 5

Waldorf Mathematics Standards, Grade 1-5

The following contains the standards for mathematics, grades 1 - 5. A great deal of study, research and exploration of the curricula of other Waldorf-Methods schools and national math standards have been merged with existing program goals and objectives to produce this document. The resulting compilation for grades 1 – 5 reflects both academic excellence and the aesthetic enlivening sought for in Waldorf-Methods schools.

MATH STANDARDS

The curriculum standards are formatted to display both the specific skills and their corresponding assessment scores on the same page. In this manner, teachers are able to quickly diagnose problem areas and design lessons to address specific needs. Six mathematical domains or standards hold the skills for each grade level.

- Number Sense
- Computation and Procedures
- Patterns and Algebra
- Data Analysis, Statistics and Probability
- Geometry
- Measurement

Each of these standards is in turn formatted in three columns. The far left column names the specific skills for the grade level. The center numerical rubric is the quantitative score of the student in the named skill. The rubric to the far right identifies the type of assessment utilized in determining the student's score.

Each grade level is preceded by a short narrative summarizing the nature of the students' learning and the curriculum approach of that grade level. Problem solving and

mathematical reasoning are not named as specific strands because they do not represent a content domain—they cut across all six strands and are needed to succeed in any of these six domains. This format is constructed, not to reduce the importance of problem solving and reasoning, but rather to encourage teachers to promote and establish this essential component in all areas of mathematical study. Extra attention to problem solving practice has been addressed by specific objectives in the Computation and Procedures strand of each grade.

ASSESSMENT

It has been observed through the 80-year history of Waldorf education and current research in Math Pedagogy that an inundation of unquestioned, cognitive information presented in fragmented skill drills leads to a one-sided or negative relationship with mathematics. Attempts have been made, therefore, to instill an appreciation to the realm of mathematics through the discovery of and interaction with interesting mathematical phenomena from the everyday world surrounding us. This includes, but is not limited to: rhythmical patterns in nature, musical and artistic correlations, and everyday practical experiences. These forms of curriculum implementation do not always easily lend themselves to traditional test forms for assessment. In addition, students in the early grades (particularly grade one) may not be proficient enough at reading to comprehend the test directions. Therefore, for these reasons, two additional means of assessment have been added. Below is an explanation of the forms of assessment.

Forms of Assessment

OB Observation. Visual and auditory observation of the standard named by the teacher or aide. Rating is an objective view of the student's success/ability.

LB Lesson Book entries. These are problems, exercises or constructions that the student performs in his or her lesson books in class with no outside help. Rating results from the teacher corrections.

AT Assessment Test. Any quiz, exam or standardized test given to measure the student's ability of any grade level skill.

In order for this to have an objective "baseline-of-performance" for every student, a standard grade-level test, assessing each skill, will be administered. This document includes the assessment test for grades 1, 3 and 5. These are representative of the tests to follow. (Note that the test for grade 1 is administered by the teacher and based on her observations. As the tests move through the grades, they become more individually read and written by the student.

However, it is **STRONGLY** felt that one test does **NOT** accurately represent a student's true ability or performance skill. A better assessment is derived from a compilation of the rubric scores gathered from various assessments (OB, LB, and AT) administered throughout the year. Multiple assessments require time and care taken by the teacher for record keeping.

Quantitative Rubric Scores

4	85 - 100% of the criteria presented of the named skill performed correctly. Mastery level.
3	60 - 84% of the criteria presented of the named skill performed correctly. Partial Mastery level. (Falls short of full understanding.) Student can reach mastery with additional work.
2	25 - 59% of the criteria presented of the named skill performed correctly. Fragmented Comprehension level. (Significant gaps in understanding.) Student may be able to reach mastery with help and additional work.
1	Less than 24% of the criteria presented of the named skill performed correctly. Limited Comprehension level. (Little or no understanding of concepts involved.) Student would need considerable instruction to achieve mastery.

GRADE ONE

In first grade, math is taught through movement, drama, music, art, and storytelling. These multisensory approaches enliven the subject. The qualitative aspects of whole numbers one through twelve are introduced using simple arithmetic stories and visual imaginations, as are the quantitative relations of numbers up to 100 using visual representations (patterns, pictures, simple geometric forms, and models). The idea that a whole can be divided into many parts is stressed. Manipulatives, handmade or gathered from nature, give the children an opportunity to explore these concepts. The four arithmetic operations are presented through imaginative and concrete experiences. The natures, uses, and qualities of the four processes (addition, subtraction, multiplication, division) are stressed via personifications, stories, and pictures. Their interrelatedness is important, especially the ability to move from one operation to another. Teaching often starts with archetypal number patterns from nature. Rhythmic movement exercises are used to strengthen the memory forces and activate the children's wills.

GRADE ONE

STANDARDS AND SKILLS

RUBRIC

ASSESSMENT

A. NUMBER SENSE

1. Rote counts to 100
2. Demonstrates 1:1 correspondence to 30 and labels with a number
3. Reads and writes 2-digit whole numbers
4. Breaks down a 2-digit number into ones and tens
5. Orders numbers to 30
6. Compares numbers to show greater than, less than, equal to 30
7. Skip counts number families 2, 3, 5, 10 to the 12th multiple
8. Can recite the 2, 5 and 10 times tables to the 12th multiple
9. Can regroup objects to show different representations of the same sum to 12

1	2	3	4		OB	LB	AT
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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B. COMPUTATION AND PROCEDURES

1. Knows addition and subtraction math facts to 12
2. Can represent on paper a sum or product to 12 in algorithmic form in a variety of ways (e.g., $4+4$, $6+2$, $7+1$) both horizontally and vertically
3. Can show relationship between all 4 processes by acting out number stories with real objects or by writing an algorithm that illustrates the story
4. Knows the different "jobs" of addition, subtraction, multiplication and division
5. Can solve mentally or in writing problems using all 4 processes (up to 12)

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C. PATTERNS AND ALGEBRA

1. Can continue and extend a pattern rhythmically, symbolically, in shape or color, or numerically

□ □ □ □ □ □ □ □

D. DATA ANALYSIS, STATISTICS, AND PROBABILITY

1. With a group, can collect data and form a display and be able to indicate greater than, less than, or equal

E. GEOMETRY

1. Can kinesthetically form a circle, a square, an oval, and a rectangle with class
2. Knows right from left
3. Can arrange objects in space according to position and direction
(e.g., near, far, below, above, up, down, left, right)
4. Can order objects by shape, volume, and size
5. Can give and follow directions about location

F. MEASUREMENT

1. Uses non-standard units to measure
2. Uses non-standard units to compare and order objects
3. Estimates quantity




GRADE TWO

In second grade students largely continue and deepen the work begun in first grade. Where first grade was the foundation, second grade is the platform upon which the higher structures will be built.

The imaginative, personified quality which still lives strongly in the 7/8- year-old is used to fully develop inspiring pictures, with strong visual/narrative elements, of the operations involved in the four processes. The students are taught to differentiate between the processes and know when to use each one as well as to be able to work simple problems of each type in their head and on paper. (In written work, a strict orderliness should be remembered.)

The concepts and mechanics of carrying and borrowing are introduced with the use of manipulatives, imaginative pictures, and grouping and regrouping activities. The neat columnar writing of problems is stressed. Review and practice of previous work is performed. The ability to write dictated and read written numbers 1-100 is firmly established before the students move on to place value. Counting by the various multiples is secured before moving on to written multiplication and division. In second grade, rhythmic counting is transformed into the times tables (2s, 3s, 4s, 5s, 10s). Rhythmic and patterning work increase in sophistication, emphasizing the aesthetic and dynamic quality of the number line through arranging number families in various ways. Students are encouraged to consciously see order and beauty in number patterns. Visualizations of the counting patterns are introduced—string boards, group geometric forms in space, etc. Opening exercises can be built around number work—from group forms to simple computation games—and can include moving more geometric forms. Word problems will continue as students write the simple algorithm that applies. Students solve written, oral story, and mental math problems using math concepts.

GRADE TWO

STANDARDS AND SKILLS

RUBRIC ASSESSMENT

A. NUMBER SENSE

1. Rote counts to 1000
2. Demonstrates understanding of numbers to the hundredth place
3. Demonstrates 1:1 correspondence to 100 and labels with a number
4. Reads and writes 3-digit whole numbers
5. Breaks down a 3-digit number into ones, tens and hundreds
6. Orders numbers to 900
7. Compares numbers to show greater than, less than, equal to 900
8. Skip counts number families 6, 9, 11 forwards and backwards to the twelfth multiple
9. Can recite the 2, 3, 4, 5, and 10 times tables to the twelfth multiple
10. Can regroup objects to show different representations of sums to 18, products to 48, and corresponding differences and quotients
11. Can demonstrate, using manipulatives, the concept of regrouping as used in carrying and borrowing

[illegible]

B. COMPUTATION AND PROCEDURES

1. Knows addition and subtraction math facts to 18
2. Can represent on paper a sum to 18 and a product to 24 or their opposite operations in algorithmic form in a variety of ways (e.g., $4+4$, $6+2$, $7+1$) both horizontally and vertically
3. Can show relationship between all 4 processes by acting out number stories with real objects or by writing an algorithm that illustrates the story
4. Knows the different “jobs” of addition, subtraction, multiplication and division
5. Can solve mentally, up to a 2-digit $+$, $-$ algorithm or on paper, 3-digit one
6. Can check addition by using subtraction and vice versa
7. Can solve mentally or on paper very simple \times or \div fact if in 2, 3, 4, 5, 10 tables
8. Can draw a model as a problem-solving tool
9. Uses number sense to justify the reasonableness of solutions to story problems

[illegible]

C. PATTERNS AND ALGEBRA

1. Can continue and extend a more complex pattern rhythmically, symbolically, in shape or color, or numerically
2. Can describe and construct patterns that show relationships among basic arithmetic facts to 18
3. Can identify missing object or number in a given pattern
4. Can create and solve problems using words, symbols, drawings, algorithms, or objects

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D. DATA ANALYSIS, STATISTICS, AND PROBABILITY

1. Collects and sorts a set of objects with two or three attributes
2. With a group, collects data and forms a display. Able to indicate greater than, less than, or equal
3. Analyzes data displays by making comparisons, inferences, and predictions

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☐ ☐ ☐ ☐ ☐ ☐

GRADE TWO

STANDARDS AND SKILLS

E. GEOMETRY

- 1. Knows right from left
- 2. Can order objects by shape, volume, and size
- 3. Can find patterns in geometric figures
- 4. Recognizes shapes in different orientations and in relationship to each other (symmetry and congruence) through form drawing

F. MEASUREMENT

- 1. Uses non-standard units to measure length and width
- 2. Uses non-standard units to compare and order objects by length and width
- 3. Uses units of measurement in simple problem-solving situations
- 4. Estimates quantity

RUBRIC				ASSESSMENT		
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1	2	3	4	OB	LB	AT
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GRADE THREE

In third grade, the students begin to develop a basic sense for practical math and an appreciation for the work which numbers and the processes can do. This first practical picture of numbers can be introduced through the work with analog clocks and calendars as well as with counting money and making change.

All forms of counting (all number families) are firmly established. (Concerns should be raised regarding children who are still experiencing difficulty in this area.) Likewise, basic additive/subtractive number facts are memorized as well as the times tables (2, 3, 4, 5, 6, 8, 9, 11). Also, by year's end, place value is established and computations using multiple place value are developed. Long addition, subtraction, and multiplication will be mastered. Subtracting from zeroes can be introduced. Students are introduced to various units of measurement, beginning with how the standards were derived from the human form. Length, liquid weight, and money are taught using concrete experiences of measurement and measuring tools. Some students may find division difficult and for them, instruction proceeds methodically. Work begins with even quotients and moves on to remainders. Personifications are still useful. (Avoid two-digit divisors until the mechanics of division are secure and there is some sense of estimation.) Attention is paid to memorizing the steps and their repetitive nature, as well as keeping work neatly aligned. Checking (proving) one process by using the reverse process continues. Continued emphasis is placed on the importance of informal guessing and estimating. Students are encouraged to problem solve using various strategies.

GRADE THREE

STANDARDS AND SKILLS

RUBRIC

ASSESSMENT

A. NUMBER SENSE

1. Can read, write and order numbers to 10,000
2. Knows place value concepts. Can break down a 4-digit number into ones, tens, hundreds and thousands
3. Compares numbers to show greater than, less than, equal to 10,000
4. Can round to tens and hundreds
5. Can recite 2, 3, 4, 5, 6, 8, 9, 10 and 11 times tables, to the 12th multiple, forwards and backwards
6. Can regroup objects to show different representations of sums and products to 144 and corresponding differences and quotients

[illegible]

B. COMPUTATION AND PROCEDURES

1. Can access math facts (+ and - to 18; \times and \div to 60) as a tool for problem solving ☐
2. Uses paper and pencil to solve:
 - 3-digit addition and subtraction problems with and without regrouping ☐
 - 3- and 4-digit multiplication problems with a 1-digit multiplier ☐
 - 2-digit multiplication problems with a 2-digit multiplier ☐
 - Simple long division with a remainder (i.e., 4 into $38 = 9R2$) ☐
3. Can check one process by using the reverse process ☐
4. Can mentally solve 2-digit addition and subtraction problems and problems involving multiplication and division facts through the first 6 tables ☐
5. Can use a variety of problem-solving strategies: guess and check; solve a simpler problem; make a model or drawing; act it out ☐

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C. PATTERNS AND ALGEBRA

1. Interprets and extends number patterns
2. Describes and constructs patterns that show relationships among basic multiplication facts to 9×9
3. Finds a missing number in an equation through 100 involving any of the 4 processes
4. Can create and solve problems using words, symbols, drawings, algorithms, or objects

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D. DATA ANALYSIS, STATISTICS, AND PROBABILITY

1. Can collect data and construct displays or simple graphs. Able to indicate greater than, less than, or equal
2. Can analyze data displays by making comparisons, inferences, and predictions

GRADE THREE

STANDARDS AND SKILLS

RUBRIC

ASSESSMENT

E. GEOMETRY

1 2 3 4

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1. Develops concepts of shape, size, symmetry, congruence, and similarity with two and three-dimensional shapes, using form drawing where appropriate
2. Determines perimeter and area of a rectangle, pictorially and arithmetically

The figure shows eight small squares arranged in two rows of four. Each square has a different pattern of dots on its sides:

- Row 1:
 - Square 1: Dots on the top and bottom sides.
 - Square 2: Dots on the top and right sides.
 - Square 3: Dots on the top and left sides.
 - Square 4: Dots on the top side only.
- Row 2:
 - Square 5: Dots on the bottom and left sides.
 - Square 6: Dots on the bottom and right sides.
 - Square 7: Dots on the bottom side only.
 - Square 8: Dots on the right side only.

F. MEASUREMENT

1. Uses non-standard units to estimate and order objects and measure lengths
2. Uses standard units (U.S.) to estimate, measure and compare objects
3. Can convert liquid measurement (cups, pints and gallons) with manipulatives
4. Can define units of weight measure
5. Selects and uses appropriate units of measurement for problem-solving
6. Reads and writes time to the nearest minute
7. Counts minutes by 1s, 5s and 10s
8. Knows terms before and after the hour
9. Can read a calendar
10. Solves problems requiring the use of a calendar
11. Reads and writes money notation to \$10,000
12. Uses money in real life situations up to \$10.00 to describe equivalence and make change

[illegible][illegible]

GRADE FOUR

As a fourth grade student advances in abstract reasoning ability, the experience of the fracturing of the whole into lawfully reconstructable parts can be explored. Fractions are introduced for the first time. However, before fractions are introduced, the 9/10-year-old must have a good facility for working with whole numbers using all four processes in long form. Students will continue to refine their understanding of multiplication, division, and number relationship, and link these to the real world. Number facts must be in place. The memorization of the tables to 12 will be completed this year, and all third grade skills are reviewed and established. Fractions are then introduced and brought to life through story problems, manipulatives, illustrations, and group projects. They are taught carefully and methodically, first breaking a whole into parts, moving from analysis to synthesis, and then introducing the concept of numerator and denominator, and methods for expanding and contracting fractions. Problem-solving techniques/strategies are continued as are simple measurement and geometry.

GRADE FOUR

STANDARDS AND SKILLS

RUBRIC

ASSESSMENT

A. NUMBER SENSE

WHOLE NUMBERS

1. Reads, writes and orders numbers to 100,000
2. Has secure understanding of place value
3. Rounds a whole number to tens, hundreds, or thousands place
4. Can illustrate practical application or advantage for rounding
5. Writes numbers from least to greatest through 10,000
6. Can use notational symbols $<$ $>$
7. Can recite times tables through 12, to the 12th multiple, forwards and backwards
8. Can identify a prime number
9. Recognizes factors and multiples of 1-12 through 144

[illegible]

FRACTIONS

10. Can represent fractions through the use of numerals, manipulatives and drawings
11. Can build one whole using fraction pieces to twelfths
12. Understands parts of a fraction — numerator and denominator
13. Can read fractions
14. Can compare fractions and use “greater than” and “less than”
15. Knows the value equivalencies of simple fractions
16. Can identify a common denominator
17. Can identify a mixed number
18. Can identify an improper fraction

[illegible]

B. COMPUTATION AND PROCEDURES

1. Can access all math facts as a tool for problem solving
2. Uses a variety of problem-solving strategies:
 - Guess and check
 - Solve a simpler model
 - Work backwards
 - Make a table or graph
 - Make a model or drawing
 - Act it out
3. Can check one process by using the reverse process
4. Can select and use the appropriate method to solve a problem (mental math, estimation, paper and pencil) and choose the operation needed
5. Uses paper and pencil to solve:

[illegible]

WHOLE NUMBERS

- Addition and subtraction of 4-digit numbers with regrouping
- Subtraction from zeroes
- 3-digit multiplication problems with a 3-digit multiplier
- Long division problems with 1-digit divisors with remainders
- Shows clear alignment of long multiplication and division problems on a page

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GRADE FOUR

STANDARDS AND SKILLS

RUBRIC

ASSESSMENT

FRACTIONS

- Addition and subtraction of fractions with common denominators
 - Establishes a simple common denominator
6. Can mentally solve problems involving all math facts
 7. Uses mental estimation

[illegible]

C. PATTERNS AND ALGEBRA

1. Interprets, extends, and creates number patterns
2. Describes and constructs patterns that show relationships among all math facts
3. Explains how a change in one quantity can produce change in another
4. Finds a missing number in an equation involving any of the 4 processes

[illegible]

D. DATA ANALYSIS, STATISTICS, AND PROBABILITY

1. Can collect data and construct displays (including graphs, tables, charts) to represent it
2. Can analyze data displays by making comparisons, inferences, and predictions

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E. GEOMETRY

1. Develops concepts of shape, size, symmetry, congruence, and similarity with two and three-dimensional shapes, using form drawing where appropriate
2. Determines the area and perimeter of right angled polygons using physical models, pictures or arithmetic

F. MEASUREMENT

1. Measures objects to nearest $\frac{1}{2}$ inch
2. Uses a ruler to convert units of measurement: inches to feet, feet to yards, centimeters to meters
3. Measures lengths in a problem-solving situation
4. Selects and uses appropriate units of measurement for problem-solving
5. Converts time measurements: seconds to minutes to hours to days
6. Calculates with time, adding and subtracting
7. Uses money in real life situations up to \$100 to compute change
8. Describes the fractional equivalencies of a dollar

[illegible]

GRADE FIVE

Fifth grade is the great period of review and consolidation. The curriculum includes all the skills gained so far. The student needs to have all times tables in place and be comfortable doing mental math using simple facts. They must be proficient in all operations with whole numbers and, by the end of the year, with fractions. Similarly, the students in need of ongoing remediation must have a firm sense that they can handle the challenges of work presented to them.

The general theme in fifth grade is fractions. The goal is that a student is able to move among whole numbers, common fractions, and decimal fractions, percents, ratios, and proportions, and to understand their relationship. All calculations involving both common and decimal fractions should be able to be done freely and easily. Calculations with inverse operations and reciprocals, brain twisters, humorous stories, and tough problems to crack, all arouse an appetite for discovery and train active forces of thinking.

In addition to reviewing all phases of mathematics introduced heretofore, extensive mental math, using sets and distribution will be worked with. A high degree of mastery with all types of computation is the goal. The communicative and associative properties can be brought as well as estimation as a tool.

The study of geometry is based on observation and imagination. The relationships of various elements of geometric form are rendered freely, without the use of instruments. Pictures of ancient Egypt/Chaldean geometry, and then Greek, are brought, as well as the relationship of area and perimeter (i.e., the square being the most efficient area/perimeter). The four-, six-, and eightfold divisions of the circle are made imaginatively, though tools may be introduced via the ancient compass (string and stick) on sand. The basic language of geometry—line, point, segment, angle, intersection, parallel, circle, polygon, etc.—is introduced. Radius, diameter, and circumference are defined. The Pythagorean theorem is introduced with the example of the

triangles out of paper and prove by observation. The biography of Pythagoras and other Greek geometers may be told.

GRADE FIVE

STANDARDS and SKILLS

RUBRIC

ASSESSMENT

A. NUMBER SENSE

WHOLE NUMBERS

1. Reads, writes and orders numbers through the billions
2. Can round or estimate any whole number to a specific place
3. Can illustrate practical application or advantage for rounding
4. Can use notational symbols $<$ $>$
5. Can recite times tables through 12, to the 12th multiple, forwards and backwards
6. Recognizes and knows factors and multiples of 1-12 through 144
7. Knows prime and square numbers through 50

FRACTIONS

8. Understands tenths and hundredths place of fractions
9. Can place common fractions in sequential order
10. Knows the value equivalencies of fractions
11. Can reduce and expand fractions using manipulatives and numerals
12. Can establish common denominators
13. Can change mixed numbers to improper fractions
14. Can change improper fractions to mixed numbers

DECIMALS

15. Can identify decimal place value to tenths, hundredths, thousandths
16. Can order decimals
17. Can change fractions to decimals and back
18. Can change decimals to fractions and back

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B. COMPUTATION AND PROCEDURES

1. Can access all math facts previously memorized
2. Can use a variety of problem-solving strategies:
 - Guess and check
 - Solve a simpler model
 - Work backwards
 - Make a table or graph
 - Make a model or drawing
3. Can check one process by using the reverse process
4. Can select and use the appropriate method to solve a problem (mental math, estimation, paper and pencil) and choose the operation needed
5. Uses paper and pencil to solve:

WHOLE NUMBERS

- Addition and subtraction of 4-digit numbers with regrouping
- Subtraction from zeroes
- 3-digit multiplication problems with 3-digit multiplier
- Long division problems with two-digit divisors with remainders
- Show clear alignment of long division problems on a page

FRACTIONS

- Addition and subtraction of simple fractions and mixed numbers
- Regrouping with fractions and mixed numbers
- Multiplication and division of simple fractions and mixed numbers

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GRADE FIVE

STANDARDS AND SKILLS

RUBRIC

ASSESSMENT

DECIMALS

- Problems involving all four processes with decimal fractions
6. Can mentally solve problems involving learned math facts and squares
 7. Uses mental estimation

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C. PATTERNS AND ALGEBRA

1. Interprets, extends, and creates number patterns
2. Describes and constructs a math pattern using previously learned math facts
3. Explains how a change in one quantity can produce change in another
4. Can identify the rule when given pairs of numbers with a common function
5. Can find a missing number in an algorithm involving any of the four processes

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D. DATA ANALYSIS, STATISTICS, AND PROBABILITY

1. Can collect data and construct displays (including graphs, tables, charts and diagrams) to represent it
2. Can analyze data displays by making comparisons, inferences, and predictions
3. Can define and calculate averages
4. Uses sampling to make probability decisions and to predict possible outcome

E. GEOMETRY

1. Draws geometric shapes freehand
2. Imaginatively divides a circle ($1/4$ s, $1/6$ s, $1/8$ s)
3. Recognizes different orientations of shapes in relationship to each other (symmetry and congruence)
4. Calculates perimeter of any polygon using whole numbers and "like" fractions
5. Calculates the area of any rectangle or triangle using standard and nonstandard measurement
6. Can apply the relationship of area/perimeter

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F. MEASUREMENT

1. Uses ruler and yardstick to measure classroom objects to the nearest $\frac{1}{4}$ inch
2. Comprehends (and problem solves) simple standard length measurements, including conversions (inches, feet, yards, miles)
3. Comprehends (and problem solves) simple standard weight measurements, including conversions (ounces, pounds, tons)
4. Comprehends (and problem solves) simple standard capacity measurements, including conversions (ounces, cups, pints, quarts, gallons)
5. Comprehends (and problem solves) simple standard units of time, including conversions (seconds, minutes, hours, days, months, years)
6. Comprehends definitions of basic metric length, mass, and capacity terms (mm, cm, m, km; mg, g, kg; l, ml)
7. Proficiently adds and subtracts time
8. Uses money in real life situations to compute change and describe equivalencies

[illegible]

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Waldorf Language Arts Standards & Rubric, Grades 1 – 5

Language Arts Standards, Grades 1-5

GRADE ONE READING

The Waldorf-inspired approach to reading recapitulates the course of reading in human history. The abstract symbols that we know as letters were derived from pictographs of ancient peoples representing scenes from real life. First graders similarly begin their reading process by discovering letters from forms in pictures drawn from stories told by their teacher (e.g.: an “S” may be derived from a curling hissing snake). From this point, however, the Waldorf-inspired approach differs greatly from the traditional methods of reading instruction in which reading goes from detail to generalization, letter to word, word to sentence, etc. The Waldorf-inspired method reverses this. Rather than proceed from the detail to the general, step by step, Waldorf-inspired reading is a process of drawing out detail from the general concept. A rich array of verses, fairy tales and folk stories from around the world are told in a vivid and enlivened way. Many of these verses and stories are memorized and dramatized by the students who use them as the content for their written books. These books become their first readers.

Students in Waldorf-inspired methodology will be exposed to less decoding and word attack instruction and may even test lower in initial reading evaluations than students in more traditional approaches. However what is encouraged from the beginning is the child’s inherent interest in life and ability to find meaning in their written language. Understanding and comprehension are a natural result. From the story, to the picture, to the sentence, to the word, children develop a love for language, putting all aspects together as a whole. The skill of learning

to read will emerge out of the student's inner experience of pictorial representation and image making. This process is accompanied by phonetic work in songs, poems and games which help establish a joyful and living experience of language.

The Waldorf-inspired curriculum's use of high quality literature and verse establishes a rich oral vocabulary and a story comprehension beyond that which could be provided by watered-down word family and simple vocabulary texts.

CURRICULUM STANDARDS

1. Listens to and experiences a wide range of literature from rich, powerful and diverse archetypal fairy and folk tales, verses and songs from around the world (e.g.: Germany, Russia, Japan, Norway, India, Ireland and Africa).

2. Comprehends and inwardly interprets the content of the story.

3. Develops proficiency in beginning reading skills and strategies appropriate to the pace of Waldorf-inspired methodology.

DEMONSTRATIONS OF STANDARDS

- Show enthusiasm and attentive behavior while listening to the stories.

- Retell the story.
- Talk to others about the story, participate in discussions.
- Create projects such as drawings, paintings, and models related to the story.
- Dramatize the story through acting and puppetry.
- Use pictures to make predictions.
- Select favorite stories.

- Show knowledge of how print is organized and read.
- Read from left to right and top to bottom.
- Identify the front and back of a book.
- Match some spoken words with print.
- Identify upper case letter names, shapes and sounds.
- Identify some high frequency words.
- Demonstrate knowledge of phonemic awareness
- Identify beginning, middle and ending sounds of words.
- Clap syllables in words and sentences.
- Orally recognize rhyming words.
- Recognize words that start and end the same.
- Substitute words in a rhyming pattern.
- Blend sounds into words.
- Apply knowledge of letter-sound correspondences.
- Recognize some word families.
- Read unknown words using meaning cues (pictures, knowledge of the story, etc.).
- Show knowledge of decoding strategies (sound out words, compare similar words, break words into smaller words).

WRITING

Like the current language experience approach to reading in mainstream education, Waldorf-inspired students learn to read through their own writing. Therefore a strong emphasis is placed on the writing process. Unique to the Waldorf-inspired curriculum is form-drawing. Children begin by walking and gesturing the two basic forms, the straight line and the curve. These are carefully brought to the actual process of writing. The students then proceed to practice a diverse array of patterns, utilizing the line and curve which enhances their ability to write letters and measure spatial relationships used in writing.

After several form drawing lessons, the students will make their own books featuring simple sentences and colorful illustrations, from the verses and stories told to them by their teacher.

CURRICULUM STANDARDS

1. Participates in form drawing instruction.
2. Begins to assimilate the necessary skills for writing.
3. Begins to organize thoughts and information for writing.
4. Uses writing to communicate.
5. Begins to use the appropriate conventions of written language.

DEMONONSTRATIONS OF STANDARDS

- Walk and gesture straight lines and curves.
- Draw straight lines and curves and patterns that arise from combining these.
- Form letters out of practice with form drawing.
- Copy written words from verses and story segments.
- Begin to organize ideas for simple sentences.
- Begin to include details when brainstorming for writing.
- Read and explain own drawings and writings.
- Copy sentences from stories or verses.
- Dictate own story or contribute to group story.
- Write using a left to right, top to bottom progression.
- Write own name.
- Use letters to write and copy.
- Understand the meaning of a sentence.

SPEAKING/LISTENING

Waldorf-inspired instruction relies heavily on oral presentation. The oral tradition is used for its ability to develop rich vocabulary and deepened inner comprehension as well as its ability to expand the listening and perceiving capacities of the student. Both the content of the speech and the articulation are conscientiously brought into the daily lessons.

CURRICULUM STANDARDS

1. Uses daily speech to develop awareness and skills.

2. Uses listening to develop awareness and skills, through the daily listening to quality folk literature.

DEMONSTRATIONS OF STANDARDS

- Recognize rhythms and patterns of language in verses.
- Develop correct pronunciation.
- Learn to speak clearly and audibly.
- Build a rich resource of words.
- Use an increasingly broad vocabulary.
- Build comprehension through retelling of stories.
- Participate in creative dramatics and choral speaking.
- Learn to respectfully take turns when speaking.
- Express ideas orally in complete sentences.
- Begin to develop higher thinking skills through the retelling of stories (e.g.: sequencing, inferring and deducting).

- Show increased vocabulary and conceptual comprehension.
- Enhance pictorial thinking.
- Develop an enthusiasm for the oral tradition.
- Follow simple directions.
- Recite short poems, rhymes, songs and stories with repeated patterns.

GRADE TWO

READING

Reading instruction continues with the oral presentation of stories and verses from which the children make their own readers. A stronger emphasis is given in this second year to word attack and decoding strategies. The oral tradition continues to allow the student to utilize a higher level vocabulary and deeper conceptual comprehension in their work than simplified lower grade texts and readers allow. Animal fables and legendary tales of virtuous and courageous deeds from cultures around the world are studied.

CURRICULUM STANDARDS

1. Listens to and experiences a wide range of literature from the above mentioned sources.
2. Comprehends and inwardly interprets the content of the story. Starts to read simple student or teacher made books
3. Develops proficiency in beginning reading skills and strategies appropriate to the pace of Waldorf-inspired methodology.

DEMONONSTRATIONS OF STANDARDS

- Show enthusiasm and attentive behavior while listening to the stories.
- Respond to what has been heard or read to develop understanding.
- Retell stories and events using beginning, middle and end.
- Describe and identify the setting, characters or events.
- Recognize topic or main idea.
- Relate previous experiences to what is heard.
- Make predictions about the content.
- Restate ideas from the text.
- Read aloud familiar materials of the quality and complexity illustrated in grade appropriate materials.
- Use knowledge of phonemic awareness and phonics to blend sounds for more complex words.
- Change beginning, middle and ending sounds of words to make new words.
- Use decoding strategies, i.e.: sounding out words, comparing similar words, breaking words into smaller words.
- Integrate knowledge of phonics, meaning clues and language structure when reading.
- Use conventions of print (e.g.: capitals and periods) to facilitate oral reading.
- Have rhythm breathing and intonation that sounds like natural speech.
- Use strategies such as rereading, cross checking

and self-correcting to facilitate reading.

WRITING

Writing in the second grade continues to be centered around the children's handmade books and their form drawing. Children start to write their own sentences for these books as well as copying what the teacher has written. Simple punctuation and lower case/upper case distinctions are introduced. Cursive is usually brought in the final term of the year. Form drawing patterns become more challenging and continue to improve the spatial relationships and legibility required in the writing process.

CURRICULUM STANDARDS

1. Participates in form drawing instruction.
2. Continues to assimilate the necessary skills for writing.
3. Begins to organize thoughts and information for writing and continues to use writing for communication.
4. Begins to use, with some assistance, appropriate conventions of written language.

DEMONONSTRATIONS OF STANDARDS

- Draw complicated patterns of straight and curves lines
- Begin to draw and understand symmetrical patterns.
- Form upper and lower case print and cursive letters.
- Write words both on their own as well as those copied from the board or dictation.
- Organize ideas into sentences and simple paragraphs.
- Write simple paragraphs from told stories or from life experiences. These paragraphs include appropriate details and stay within the assigned topic.
- Self correct spelling of familiar high-frequency words.
- Correct simple punctuation and capitalization
- Use a simple, informative sentence out of the appreciation for the word and what is being learned.
- Capitalize the first word in a sentence and the pronoun "I."
- Use correct punctuation at the end of a simple statement and the end of a simple question.
- Be attentive to proper margins, indentations and the appearance of the page.
- Use conventional spelling for high frequency words and those words with regular spelling patterns.
- Be able to spell common sight words, basic reading vocabulary words and word families.
- Write from dictations of simple sentences

SPEAKING/LISTENING

The students' attentive listening span continues to improve as the stories, verses and games become more complicated. Clear articulation is individually encouraged through choral recitation of poetry verses, and dramatizations from the language blocks are still the main vehicle for student practice. During the retelling and discussion of the lesson content, respectful listening to others' points of view is emphasized.

CURRICULUM STANDARDS

1. Uses daily speech to develop awareness and skills.

2. Uses daily listening to develop awareness and skills.

DEMONONSTRATIONS OF STANDARDS

- Speak with clear pronunciation and enunciation.
 - Use increasingly descriptive oral vocabulary.
 - Begin to ask questions for understanding and respond to the questions of others.
 - Begin to participate in group discussions.
 - Participate in choral reading, recitation of rhymes, poems, songs and stories.
 - Participate in dramatics.
 - Retell stories in logical order.
 - Create oral stories to share with others.
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- Listen responsively and respectfully.
 - Follow simple two- to three-step directions.

GRADE THREE

READING

The students continue to read from their own books, which they make from content given orally from the teacher. However, the narrative and compositional writing requirements for their books are increased. More published materials, both fictional and expository, are utilized.

Legends, native tales and stories about the origins of living on the earth; farming, gardening, house building, animal husbandry, etc., are studied.

CURRICULUM STANDARDS

1. Listens to and reads from a diverse collection of texts and stories.
2. Reads, comprehends and inwardly interprets a wide range of materials appropriate to the grade level.
3. Is proficient in basic reading skills and strategies and continues to develop vocabulary and fluency in reading.

DEMONSTRATIONS OF STANDARDS

- Read fiction, including self-selected and teacher selected traditional and contemporary literature from a variety of cultures.
- Read and respond to narrative materials to develop understanding.
- Make, confirm or reverse predictions.
- Extract significant information about settings, characters and events.
- Identify the problem or solution.
- Recognize topic, main idea and supporting details.
- Relate what is read to prior knowledge and experience.
- Ask and answer questions.
- Restate and summarize information.
- Read aloud accurately, familiar materials of the quality and complexity illustrated in grade appropriate materials.
- Use a range of cueing systems, e.g.: phonics, meaning, content, to determine pronunciation and meanings.
- Use all decoding strategies mentioned in grade two including looking for word parts/affixes.
- Use a rhythm, pace and intonation that sounds like natural speech.
- Use conventions of print, including commas, to facilitate oral reading.
- Use strategies such as rereading, monitoring, checking, predicting and confirming and self correcting to facilitate reading.
- Continue to develop vocabulary.
- Determine the meaning of unknown words using context and dictionaries.

WRITING

Students continue in their form drawing instruction and in the making of their own books. Narrative and compositional writing requirements are increased. Students are introduced to sentence structure, simple paragraphing, all punctuation markings, beginning grammar, and use of reference and research material.

CURRICULUM STANDARDS

1. Increases proficiency in form drawing.
2. Begins to organize thoughts and information for writing.
3. Uses writing to communicate for a variety of purposes.
4. Uses appropriate conventions of written language which include grammar, spelling, punctuation, language usage, capitalization, legibility, sentence structure and paragraphing.

DEMONSTRATIONS OF STANDARDS

- Continue drawing complex patterns of straight and curved lines.
- Draw mirror forms in four areas of 2-D space.
- Organize ideas for writing.
- Include appropriate facts and details.
- Stay with the assigned topic.
- Begin to edit and correct spelling.
- Begin to edit for appropriate capitalization and punctuation.
- Begin to revise work to further develop the story.
- Write to tell a story.
- Include setting, characters and events.
- Begin to use dialogue.
- Include beginning, middle and end.
- Maintain focus.
- Write to inform reader.
- Reflect literal understanding of the topic.
- Organize content.
- Include appropriate facts and details.
- Use descriptive words.
- Use efficiency of expression.
- Spell correctly high frequency words on third grade level spelling lists.
- Spell using continued phonic work and encoding skills.
- Use complete sentences, both simple and compound.
- Use paragraphs to organize information and ideas.
- Capitalize all proper nouns and words at the beginning of a sentence, use correct punctuation at the end of a sentence.
- Use commas correctly in the greetings and closures in a letter and with dates and words in a series.
- Identify nouns, verbs, adjectives and adverbs and use them correctly in a sentence.

SPEAKING/LISTENING

Students will further develop and expand their speaking skills through choral and individual speaking of the memorization of poetry, verse and selections from the lesson content mentioned in the literature section.

Dramatizations and class discussions continue with the emphasis on respectful listening.

CURRICULUM STANDARDS

1. Uses daily speech to develop awareness and skills.

2. Uses daily listening to develop awareness and skills.

DEMONONSTRATIONS OF STANDARDS

- Speak clearly and audibly.
 - Use descriptive and oral vocabulary.
 - Use appropriate grammar and word choice when speaking.
 - Ask appropriate questions to gain information and maintain or clarify understanding.
 - Respond to the questions of others.
 - Summarize information shared orally by others.
 - Clarify and explain words and ideas orally.
 - Contribute to group discussions.
 - Use increasingly complex sentence structure in oral communications.
-
- Listen responsively and respectfully.
 - Paraphrase and summarize what has been heard.
 - Follow oral directions with three or four steps.
 - Understand others' perspectives and points of view.

GRADE FOUR READING

Students continue to expand and develop their comprehension and word attack skills through the writing of narratives and compositions for their self-made books. In addition, regular library use, recreational reading, book reports and reference research become a part of the curriculum.

Mythologies and legends of the Norse and Teutonic Peoples of pre-Christian Europe and Celtic legends, and stories from California history are also studied.

CURRICULUM STANDARDS

1. Listens to and reads a wide range of literature from the suggest fourth grade curriculum and other materials of the quality suggested in the reading list.
2. Reads, comprehends and evaluates quality materials appropriate to the grade level.
3. Is proficient in reading skills and strategies and continues to develop vocabulary and fluency in reading.

DEMONONSTRATIONS OF STANDARDS

- Listen attentively to stories told in class.
- Read both fiction from a variety of cultures and non-fiction which have been self and teacher selected.
- Respond to fiction using evaluative processes.
- Demonstrate an understanding of the text.
- Make, confirm and revise predictions.
- Relate what is read to prior knowledge.
- Extract appropriate, significant information about events, characters and settings.
- Select a favorite author.
- Put ideas in own words.
- State main idea in material read or heard and the significant details in his/her own words.
- Read aloud accurately familiar materials of the quality and complexity illustrated in grade level appropriate text.
- Self correct when subsequent reading indicates an earlier miscue.
- Use a range of cueing systems, e.g., letter-sound correspondences (phonics), meaning, grammar, and overall context to determine pronunciation and meanings.
- Use a rhythm, pace and intonation that sounds like natural speech.
- Continue to develop vocabulary.
- Determine the meaning on unknown words, using context, glossaries and dictionaries.

WRITING

Students continue to develop and expand their writing skills through the making of their own expository and creative books. Form drawing continues. New lessons on styles of writing, letter writing, sentence types and parts of speech are introduced. Spelling skills are increased through continued work on: phonetic encoding and syllabifying, proofreading, dictionary use and formal vocabulary work.

CURRICULUM STANDARDS

1. Participates in form drawing instruction.
2. Organizes thoughts and information for writing, develops drafts, edits and revises work.
3. Writes effectively for a variety of purposes.

DEMONSTRATIONS OF STANDARDS

- Draw complicated forms of curved and straight lines that integrate all reversibles and symmetries.
- Draw more complicated forms of metamorphosis.
- Generate and organize ideas for writing.
- Include appropriate facts and details.
- Revise work by combining sentences, adding details to support the content, and adding or changing work to make the meaning clear to the reader.
- Proofread writing for misspelled words using dictionaries when necessary.
- Write to inform the reader.
- Maintain a focus throughout a piece of writing
- Provide appropriate facts and details to accommodate the information need of the reader.
- Organize the writing so that the reader can easily follow what is read.
- Write to tell a story both narrative and biographical.
- Outline the main ideas and organize the writing. Has a sense of narrative development.
- Use dialogue appropriately.
- Use well chosen detail to develop character, setting and/or plot.
- Provide an engaging beginning that establishes the situation, moves through sequence of events and concludes in a logical way.
- Write to describe and express ideas.
- Explore new ideas and/or observations.
- Orient reader and use detail to elaborate on ideas.
- Exhibit clear thinking.

CURRICULUM STANDARDS

4. Uses appropriate conventions of written language which include grammar, spelling, punctuation, language usage, capitalization, legibility, sentence structure and paragraphing.

DEMONONSTRATIONS OF STANDARDS

- Use complete sentences.
- Use a variety of sentence structures with appropriate capitalization and punctuation.
- Use paragraphs to organize information and ideas.
- Understand declarative, interrogative, exclamatory and imperative sentences.
- Understand the characteristics of nouns, verbs, adjectives and adverbs.
- Use conventional spelling by:
 - > Referring to resources when needed.
 - > Working with phonetic encoding and syllabifying.
 - > Working with grade level spelling words.
 - > Using an expanded vocabulary.
 - > Speaking/Listening

SPEAKING/LISTENING

Students will continue to develop and expand their diction, pronunciation and enunciation through individual and choral speaking and dramatization. Alternative verse and poetry will be used to strengthen a sense of majesty of language. Respectful listening to others' perspectives during instructional lessons is encouraged.

CURRICULUM STANDARDS

1. Listens, understands and speaks effectively in both formal and informal situations, using appropriate conventions of language to communicate these skills.

DEMONSTRATIONS OF STANDARDS

- Ask appropriate questions and respond to the questions of others.
- Use appropriate grammar, word choice, and pacing during oral presentations.
- Paraphrase and summarize to increase understanding.
- Listen responsively and respectfully to others' points of view.
- Use clear and specific language to communicate ideas.
- Use language and gestures expressively.
- Participate in choral and individual recitations as well as dramatizations.

GRADE FIVE

READING

In addition to the continued making of their own texts and books, students further develop and expand their reading skills through: recreational reading, the study of novels and biographies, increased reference and library requirements and formal content area vocabulary instruction.

Stories from ancient India and Persia (e.g.: The Ramayana, Buddha and Zarathustra); ancient Babylonian, Chaldean and Egyptian myths (e.g.: Isis and Osiris and Gilgamesh); ancient Greek myths (e.g.: Prometheus, Odyssey and Alexander the Great); stories of the plant world—Botany.

CURRICULUM STANDARDS

1. Listens to and reads a wide range of literature from the fifth grade curriculum and other materials of the quality suggested in the reading list.
2. Reads, comprehends, interprets and evaluates quality materials appropriate to the grade level.
3. Proficient in reading skills and strategies and continues to develop vocabulary and fluency in reading.

DEMONSTRATIONS OF STANDARDS

- Listen attentively to the stories told in class.
- Read both fiction from a variety of cultures and non-fiction which have been self and teacher selected.
- Demonstrate a thorough understanding of the text.
- Make, confirm and revise predictions.
- Identify recurring themes.
- Extract appropriate and significant information about events, characters and settings.
- Identify characteristics of genres.
- State main ideas and significant details
- Read aloud accurately familiar materials of the quality and complexity illustrated in grade level appropriate text.
- Self correct when subsequent reading indicates an earlier miscue.
- Use a range of cueing systems, e.g., letter-sound correspondences (phonics), meaning, grammar, and overall context to determine pronunciation and meanings.
- Use a rhythm, pace and intonation that sounds like natural speech.
- Continue to develop vocabulary.
- Determine the meaning of unknown words, using context, glossaries and dictionaries.

WRITING

Students continue to develop and expand their writing skills through the making of their own expository texts and creative writing assignments. Form drawing continues. Grammatical study is increased to include all parts of speech, active and passive voices and simple and compound sentences. Increased emphasis is placed on learning to outline main ideas and sequence supporting details. Narrative writing from history continues. New lessons are given on learning to write research reports and business letters.

CURRICULUM STANDARDS

1. Participates in form drawing instruction.
2. Organizes thoughts and information for writing, develops drafts, edits and revises work.
3. Writes effectively for a variety of purposes and audiences.

DEMONONSTRATIONS OF STANDARDS

- Draw complex forms of interweaving curved and straight lines that “braid together.”
- Generate and organize ideas for writing.
- Include appropriate facts and details.
- Revise work by combining sentences, adding details to support the content, and adding or changing work to make the meaning clear to the reader.
- Proofread his or her own writing or the writing of others, using dictionaries.
- Provide appropriate facts and details from ore than one source to develop the subject.
- Provide an engaging beginning that establishes the situation, moves through the sequence of events and concludes in a logical way.
- Orient the reader and use relevant and well-chosen detail to elaborate on ideas.

SPEAKING/LISTENING

Aural memory, diction, pronunciation, enunciation and expression continue to develop through individual choral speaking from selections and verses of the history lessons. Dramatizations continue and at least one formal performance to the public is given. Respect, patience and thoughtfulness in listening to others is encouraged in group discussions and in daily interaction.

CURRICULUM STANDARDS

1. Listens, understands, evaluates and speaks effectively in both formal and informal situations, using the appropriate conventions of language to communicate ideas.

DEMONONSTRATIONS OF STANDARDS

- Ask appropriate questions and respond to the questions of others.
- Use appropriate grammar, word choice, and pacing during oral presentations.
- Paraphrase and summarize to increase understanding.
- Listen responsively and respectfully to others' points of view.
- Use clear and specific language to communicate ideas to the intended audience.
- Use language and gestures expressively.
- Participate in choral and individual recitation as well as dramatization.

**Elements of a Traditional Waldorf School
Second Grade Assessment**

Instructions

How to use the list and the manual:

This list is made up of a number of points that can be observed in the classroom (C), and some parts that need to be done individually (I), or, if this is not possible, you need to find time for it yourself (after having practiced sufficiently!). For this you will need to have a separate room where you can work undisturbed with the child.

If the class is very large, you may decide to observe first of all the children that stand out for one reason or another, then the oldest pupils, and lastly the youngest.

In each section of the manual is listed what materials are needed, how one should give instructions to the child and the different things one should observe. You may of course elaborate. After all, we are looking for a qualitative evaluation or analysis of a number of developmental conditions from which, in the end, a picture of the child may arise.

In principle the children should be able to carry out all the instructions halfway through second grade.

The most difficult and also the most important task is the interpretation of all the data.

What we offer you here can of course be extended and improved with your help.

(In the manual we always use "he" whether it is a boy or a girl).

GROSS MOTOR MOVEMENTS (C) in connection with 1

A) Throwing A Ball

Material: a large soft ball 15 cm diameter and a tennis ball.

Procedure: Stand opposite the child at a distance. The child should not look into the light. Throw the ball to him and let him throw it back. Repeat with one hand. Increase the distance.

Observation: does the ball "stick" to his fingers? Does he throw past you or not far enough, overhand or underhand? Does he follow the ball with his eyes? With one hand, what does the other hand do? With which hand does he throw? Does he retract his arms quickly?

B) Catching

Observations: Is he frightened of the ball? Can he see it coming? How does he hold his hands when catching? Can he throw or catch better? Put this in context with his relationship to his fellow men.

C) Directing And Aiming:

Material: Tennis ball, basket, blackboard, chalk, paintbrush.

Procedure: Put a circle on the blackboard (3cm diam.) with a point in it (shoulder height of the child). The child stands at the back of the classroom with his arm outstretched, paintbrush in his preferred hand, bristles facing him. Now he runs to the blackboard and without slowing down he has to try to put the point of the brush in the point in the circle with his arm remaining outstretched. On the board draw 7 points of a 7-pointed star, far enough apart that the child needs to use full arm length to draw the lines. He has to draw the lines leaving out 1, 2, or 3 points every time. Let him throw the tennis ball into the basket 10 times.

Observation: Is he accurate in his aim or does he miss often? Does he throw far enough?

D) Balance:

Material: A line on the floor 4 to 5 meters long, either of chalk or colored tape or ribbon.

Procedure: The child walks forward and backward across the bridge. No wet feet! Stand on one leg like a stork, also with eyes closed.

Observation: Does he walk freely or is he scared? When walking backwards, does he "stick"? Does he walk backwards recklessly, look behind, wobble, or hesitate? Does he stick to the line, take big steps or shuffle?

E) Walking:

Procedure: Do this on the playground or in a long corridor.

Question: How many steps do you think you need to take to get to the end?

Observation: Does he move arms and legs cross-laterally, or ipsilaterally (ipsilateral = right leg and right arm, left leg, left arm).

F) Running And Accelerating:

Procedure: Let the child run, first normally, then accelerating and going as fast as possible without stopping, to the end.

Observation: Do his arms and legs flap? Does he nearly fall over, or stumble? Can he accelerate by himself naturally?

G) Highjump:

Material: A long rope or pole.

Procedure: With one of the children hold the rope loosely, or hold the pole yourself. Let the children jump over it one by one.

Observation: How does he jump up and land? What kind of forward run does he have: fast, slow, short, long, much too high, or not high enough? Can he gauge the distance, listen to the sound of the step or jump? How high does he get?

H) Longjump:

Material: A pole or rope on the ground.

Procedure: Make the child push off at the line and jump as far as possible.

Observation: What kind of forward run does he have? How does he land? Is he scared? Does he overestimate? Can he push off exactly before the line?

I) Skipping Or Jumping Rope:

Material: A large and a small skipping rope.

Procedure: Let the children jump rope individually and also in a group while some turn the rope (end of second grade).

Observation: Does he jump on time or too slow? How does he cope with turning the rope and jumping at the same time? Watch the rhythm. Does he land heavily or lightly? Does he jump more in an upward or downward direction?

J) Hopscotch:

Observation: Which leg does he choose? Can he also do it on the other leg?

K) Frog Leap:

Procedure: The child jumps on his haunches from one place to another, individually or in a group. Repeat upright with legs together.

Observation: Does he bend his knees well? Can he balance when jumping upright? Do both legs go together, or one behind the other?

Individual

At this point you do something as a preparation for point 10 in connection with memory.

Material: A drawing of a rather absurd situation, e.g., a house with a flag and a chimney, flag and smoke going in opposite directions; and some sort of object, e.g., an oddly shaped bottle.

Procedure: Say: "I am going to show you a drawing. Look look at it really carefully for a moment. See what it is and remember well, because I am going to ask you something about it in a little while." The child also has to remember an unusual word, e.g., "paperhanging past," and a sentence made up of four words, e.g., "fat blackbirds find worms." Now give the child something to hold in his hand behind his back (he must not see it) and say: "Now feel what this is and remember it; you will have to draw it as well."

WITH TWO FEET (C)

How do they feel (warm, cold, clammy, cool)? You can check this when you practice writing with the feet in the classroom. What kind of feet (flat mobile toes, stiff toes, etc.)?

Picking Up Three Things With The Foot.

Material: A pencil, an eraser, and a marble.

Procedure: Let the child pick up the various objects with his preferred foot.

Observation: Do his hands and mouth move as well?

Writing With The Foot:

Material: A soft pencil or piece of very soft chalk, paper.

Procedure: A "helper" holds the paper while the child sits on a low chair or stool and writes, holding the pencil between his big toe and the next one.

Observation: Do his hands move as well?

HANDS

1) This can be observed easily when shaking hands with the child when he comes into the classroom in the morning. Are they warm, sweaty, clammy, or cold?

2) Say: "Squeeze my hand," and watch what the other hand does.

DOMINANCE (I) with 3.

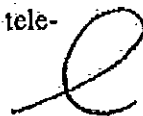
Material: A piece of paper or cardboard on which a large loop is drawn, a worksheet to be filled in (one for each child), a watch, a rolled up piece of paper for a telescope, wooden blocks, and a low chair or stool.

Procedure: Put the cardboard against the wall. The child sits on the floor in front of it, having removed his shoes. Now give the instructions in the order that they are given on the worksheet. Show the child that you can follow the loop with your hand by drawing it in the air from left to right. Then tell the child to do the same, a) with both feet together, b) with one foot, c) with one foot and one hand, d) with one foot, hand, and eye, e) with one foot and one eye, f) with one hand, g) with one hand and one eye, and h) with one eye.

Carefully note on your worksheet whether the right or left was used, and of directions. Then say: "Pick up the telescope, look through it, and tell me what you see."

Observation: To which eye is the telescope held? Does he close the other eye? The eye that looks through the telescope is the dominant eye.

Procedure: Say: "Pick up the watch; can you hear it tick," "Stand up and put your arms out sideways. Now look at one hand," "Clap your hands 10 times" (which hand



does the work?), "Kick the wooden block with your foot through the arch," and "Step onto the stool"(which foot?). You can also observe this when the child climbs stairs.

EYE-HAND COORDINATION (I) with 4.

Procedure: Draw a circle in the air with your finger at some distance from your face (diam. 35cm) and show the child that you can follow your fingers with your eyes without moving your head. Now let the child do it himself. Then his two index fingers next to each other have to take "steps," going sideways away from each other. His eyes again have to follow without moving his head.

Observation: What are the eyes doing? Does he keep his head still?

RHYTHM AND EYE-FOOT COORDINATION (I) with 5.

Procedure: Tap a rhythm on the table (visible) and have the child copy it. Tap another rhythm under the table (audible) and have the child copy it. Tap a rhythm on the child's back (tactile) and have the child copy it. Then say, "Clap the rhythm of a song you know. You may sing it while clapping. Now do it without singing (inner sonorization)." Then have him walk the rhythm of the same song, then walk and clap at the same time, then alternately turn walk and clap, preferably in a long corridor. Then have him follow the pitch of the song by raising and lowering his hands.

BODY GEOGRAPHY (C) with 6.

Procedure: Give the instructions without demonstrating. If necessary the child can stand on a stool in front of you. Say:

- a. "Touch your right ear with your right hand."
- b. "Touch your left knee with your left hand."
- c. "Touch your left foot with your right hand."
- d. "Touch your right ankle with your left hand."
- e. "Touch your right cheek with your right hand and your left knee with your left hand."
- f. "Touch your left eyebrow with your right hand and your right elbow with your left hand."

It is best to do from d. individually, as it is difficult to observe when done with the class as a whole.

SPATIAL ORIENTATION AND ORIENTATION IN TIME (C) with 7.

Procedure: Give the instructions without demonstrating. Say:

- a. "Stand in the middle of this room."
- b. "Take two steps forward."
- c. "Point with your right hand diagonally to the right behind you."

Note: Explain this in age-appropriate words.

d. "Walk a circle, going to the left, and walk in such a way that I can't see your back."
(He also has to do this with his eyes shut).

e. "Point out the third book from the right on the second highest shelf."

f. "What day is it today? Yesterday? Tomorrow? The day before yesterday? How old are you? What time of year is it?"

Observation: a-e: Is the child able to do it? How does he do it? Is he sure, unsure, not in the center, too many or too few, or left hand instead of right hand? f: Write down the answers.

FINE MOTOR MOVEMENTS (C) with 8.

Material: For e: needle and thread. For c. and d: pencil and paper

Procedure: Say a finger game rhyme and show the finger game belonging to it.

a. "Now you try it by yourself while I say the verse."

b. "Now do it with your eyes shut"

Observation: a: Can he do it? It is important that the child hears the pauses. b: Can he manage as well as with a. or does he get confused?

Procedure: c. "Write your name in the top right hand corner of the paper."

d. "Under your name write the numbers 1 to 10."

e. "Thread the needle."

Observation: c: How does the child hold the pencil? b: Does he know his numbers? Are there reversals or wrongly formed numbers (8 written as two o's one above the other)? e: Can he do it? Does he work with his whole hand or fist or does he use the tips of his fingers?

SEQUENCING (I) with 9.

Material: a. through e: a basket, beads (wooden) of different shapes sizes and colors.

Procedure: Lay out four beads in a row in front of the child and say:

a. "Can you copy this exactly " (i.e., can you make a chain like this for me? Repeat four times.)

b. "Pick up the round red one, the yellow triangular one, the blue square one and the green cylindrical one. Make a chain - 4-5 times.

c. Let the child feel three different beads behind his back (no looking!) and say: "Now lay them out in front of me in exactly the same way. Which one did you feel first? Which one next?" etc.

Each of the above sequences (a,b,c) should be laid out 4-5 times.

You can also tell a story about a child who is picking flowers for Grandma's birthday: "A red one, a yellow one, a white one, a blue one, and another red one." The child has to pick up the beads in the correct order and then in the reverse order.

Observation: How does the child manage it?

Material: Paper and pencil.

Procedure: d. Have the child draw three trees on the paper. The first tree must be the biggest and the middle tree the smallest.

e. Have him count out loud from 10 to 20.

f. Have him count backwards from 20 to 1.

g. Show him a card on which is written "TREE." Then show him a text and ask him if he can show the given word in the text. (In order to do this, the child does not have to be able to read.)

h. Does the child know the letters of the alphabet? How does he read?

MEMORY (I) with 10.

Procedure: At the beginning of the individual evaluation the child was shown a drawing. Now ask him: "What did you notice in the drawing? What was odd in the drawing? From what direction did the wind come? What was the first thing you had to do this morning?"

Observation: Write down the answers.

Procedure: At the beginning of the individual evaluation the child was asked to remember a word and a sentence. Now ask him: "What was the word I asked you to remember? What does it mean? What was the sentence you had to remember?"

Observation: Write down the answers.

Material: Paper and pencil.

Procedure: At the beginning of the individual evaluation the child had to feel the shape of an object behind his back. Now ask him: "Can you draw for me the shape of what you felt behind your back?"

Observation: Can he draw the object reasonably accurately?

****** The following takes a lot of time. Choose the areas where you suspect a problem.

HEARING OF DIFFERENCES, or auditory discrimination (I) with 11.

Procedure: Say: "I am going to say some words that have a B or a P in them. When you hear a word with a B, do this: (put your hands together), and when you hear a word with a P, do this: (clap). So: put hands together on B and clap on P." Select some easy words and some more difficult words, for example, pack, book, bulb, pussy, beak, bubble, park, plash, skip, tubby, leap, and curb.

Procedure: Say: "I am going to say some words that have a D or a T in them. When you hear a word with a D, point to me, and when you hear a word with a T, tap the table." Give examples with these sounds at the beginning, end, and middle of words, such as take, door, do, tapping, dedicate, witness, meant, rat, and rid.

Procedure: Draw on the floor in chalk a four leaf clover or a flower with four petals. In each petal write a diphthong such as ae, ou, or ea. Ask the child to stand in the center of the flower and say: "I am going to say a word. Listen carefully and jump onto the right petal."

Procedure: Draw a horizontal lemniscate on the floor. The child has to stand at the crossing and has to jump to the left or to the right to show that he can distinguish between two similar diphthongs.

Procedure: Draw two concentric circles on the floor. In the inner circle write a short vowel sound such as "eh". In the outer circle a long vowel sound like "ay". The child stands in the center. Now say: "The words that I am going to say have an "eh" or an "ay" in them. When you hear an "eh," jump into the center circle and when you hear an "ay," jump into the outer circle." Choose different examples with different vowels.

CROSSING (C) with 12

Procedure:

a. Have the child walk and draw a lemniscate. Also check when doing sums.

Observation: Note when the child avoids the crossing.

b. Let the child draw the following figure:



c. Show the child three different lemniscates, drawn side by side on the paper, including the following:



On a separate piece of paper draw the illustrated one. Ask the child where in the row he sees that figure. Make him draw it and tell him to remember it well (for question 16).

MOVING TOGETHER (I) with 13.

Procedure: Make the child draw a lemniscate in the air with his right hand. Repeat with the left hand. Make the child draw a vertical line in the air. Repeat with the left hand.

Observation: Does the unused hand move as well, or try to?

Procedure: Ask him to do both together, the vertical line with the left and the lemniscate with the right. Keep going for a while.

Observation: Do the hands begin to make symmetrical movements? Does one hand take over the movements of the other hand, or is he able to keep on making the different movements?

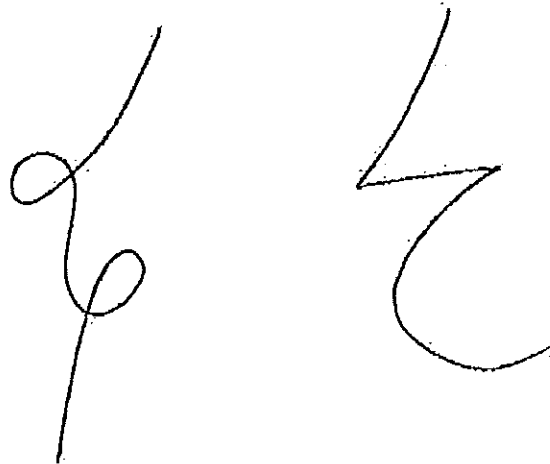
Let the child draw both of these forms simultaneously on a large piece of paper, making the movements as big as the arm will reach.

FLOWER/ROD EXERCISE (see The Extra Lesson by Audrey McAllen)

SYMMETRY (C) with 14.

Procedure: Over a period of time get the children to draw simple symmetry exercises on the blackboard, one child at a time. When working with the class as a whole, they can easily copy one another.

Example:



SUMS (I) with 15.

Procedure: Ask the child to work out the following sums (mental arithmetic).

$$3 + 4 =$$

$$5 + 6 =$$

$$9 - 5 =$$

$$12 - 4 =$$

$$12 = 4x$$

$$14 = 2x$$

$$8 \div 2 =$$

$$6 \div 3 =$$

Observation: Does he count on his fingers? Does he get to the answer promptly?

ASKING FOR A FORM THAT HAD TO BE REMEMBERED (I) with 16.

Procedure: Ask the child to draw the form again that he had to remember (12c).

Worksheet

Date
Name
Age
Favorite color

1. Gross Motor Movements

- a. Throwing a ball
- b. Catching a ball
- c. Directing and aiming
- d. Balance
- e. Walking forwards
backwards
- f. Running and accelerating
- g. Highjump
- h. Longjump
- i. Jumping rope

Show a drawing, give a word and a sentence to be remembered, give a shape to feel behind the back.

2. Feet

Warm, clammy, cool, cold. Picking up a pencil

Hands move as well, yes/no

Hands: Warm, clammy, cool, cold.

3. Dominance

Hand _____ Foot _____ Eye _____ Ear _____

Follow the shape: With both feet together: _____ (direction)

with one foot: _____ foot?

with _____ foot and _____ hand,

with _____ foot and _____ eye,

with _____ hand,

with _____ hand and _____ eye,

with _____ eye.

Pick up the telescope: With _____ hand to _____ eye.

Pick up the watch: With _____ hand to _____ ear.

Arms to the side: Looking to the right/left hand: _____

Clap your hands 10 times (with _____ foot).

Kick the wooden block: _____ foot

Step onto the stool: _____ foot.

4. Eye-Hand Coordination.

When drawing a shape in the air, following it with the eyes

5. Rhythm and eye-foot coordination.

Tap rhythms (copy): via sight: _____

via hearing: _____

via feeling: _____

Clap the rhythm of a song: _____

Walk the rhythm of a song: _____

Walk: clap and step in turn: _____

Follow the pitch of the song: _____

Sing a song (sense of taste, sense of self movement): _____

Hearing, Self movement, Balance: _____

6. Body geography

a. Touch your right ear with your right hand: _____

b. Touch your left knee with your left hand: _____

c. Touch your left foot with your right hand: _____

d. Touch your right ankle with your left hand: _____

e. Touch your right cheek with your right hand, and your left knee with your left hand: _____

f. Touch your left eyebrow with your right hand, and your right elbow with your left hand: _____

7. Spatial Orientation and orientation in time

a. Stand in the middle of this room: _____

b. Take two steps forward: _____

c. Point with your right hand (at an angle) to the right behind you: _____

d. Walk a circle, going to the left, and walk in such a way that I can't see your back: _____

e. Point out the third book from the right on the second highest shelf: _____

f. Time: What day is it today: _____

tomorrow: _____

yesterday: _____

8. Fine motor movements

a. Finger game: Eyes open: _____

b. Finger game: Eyes closed: _____

c. Write your name in the top right hand corner of the paper: _____

d. Under your name write the numbers 1 to 10: _____

e. Thread a needle: _____

9. Sequencing, working with four different beads

a. via sight: _____ sequence _____ color _____ shape _____

b. via hearing: _____ sequence _____ color _____ shape _____

c. via feeling: _____ sequence _____ color _____ shape _____

d. connection hearing/sight: _____

e. counting forwards: _____

f. counting backwards: _____

g. recognizing one given word in a text: _____

h. can the child read already: _____

10. Memory

a. via sight: ask about the drawing? _____

what does not fit? _____

where does the wind come from? _____

what was the first thing you were asked to do? _____

b. via hearing: what was the word I asked you to remember? _____

what does it mean? _____

what was the sentence that you had to remember? _____

c. via touch: draw the shape that you felt? _____

11. Hearing of differences

a. put hands together on B, clap on P: _____

b. put hands together on D, clap on T: _____

c. jump into the correct petal on the diphthong: _____

12. Crossing

a. walking the lemniscate: _____

b. drawing the lemniscate: _____

c. Draw: three different lemniscates on paper: _____

13. Moving together

8 on the right, 1 on the left: in the air: _____

on paper: _____

14. Symmetry

a.



b.



15. Sums

$5 + 6 = \underline{\hspace{2cm}}$

$4 + 3 + 6 = \underline{\hspace{2cm}}$

$9 + 5 = \underline{\hspace{2cm}}$

$12 - 4 = \underline{\hspace{2cm}}$

$12 = 4x; x = \underline{\hspace{2cm}}$

$8 \div 2 = \underline{\hspace{2cm}}$

16 Asking for form that had to be remembered

see 1 12c.

17.

Does the child reverse his letters/numbers? _____

Does the child wet his bed? _____

Other remarks: _____

Name _____

Age _____

Grade _____

Dominance _____

Eye: _____ Foot: _____ Hand: _____ both feet: _____

one foot: _____ foot-hand: _____ foot-eye: _____ both hands: _____

one hand: _____ hand-eye: _____ one eye: _____

**Compassionate Communication
& Waldorf Schools**

By John Cunningham

COMPASSIONATE COMMUNICATION



AND
WALDORF
SCHOOLS

By
John Cunningham

"Compassion is the radicalism of our age."

His Holiness the Dalai Lama

INTRODUCING COMPASSIONATE COMMUNICATION

Common Ground

The purpose of this booklet is to introduce the practice of Compassionate Communication. I hope to show some of the ways that this practice can promote understanding and compassion within our Waldorf School communities.

Waldorf education has been a central part of my life for over twenty-five years as a parent, class teacher and AWSNA volunteer. I'm devoted to seeing this education thrive for the sake of our children and have met many other people over the years who share this commitment.

Each of us brings our unique talents, abilities, goals and aspirations into our communities and we hope to find ways to contribute and participate. Moment by moment we are doing the best we can to the best of our ability and we are drawn together by our common commitment and vision for the children. In that we are all alike.

Unfortunately, sometimes our diverse backgrounds lead us to differ on how to move forward in creating or sustaining our schools; or through miscommunication and misunderstanding, our well-intended initiatives go awry.

Spectator Language

In those situations, much of our habitual languaging lets us down. Rather than improving the situation, it in fact contributes to further misunderstanding. The languaging I am referring to "traps us in a world of ideas about rightness and wrongness—a world of judgments. When we speak this language, we judge others and their behavior while preoccupying ourselves with who's good, bad, normal, abnormal, responsible, irresponsible, etc." (Rosenberg) Blame, criticism, labels, diagnoses and comparisons are various and common ways we judge one another.

These ways of communicating are referred to as life-alienating, analytical or demand-based. Each term highlights a particular quality. For me, I find it helpful to refer to this way of communicating

as Spectator Language. The experience of a spectator is one of otherness, isolation and duality. From our spectator consciousness, we form judgments of others. Tragically, this spectator language is creating a desperate shortage of understanding in the world.

In our schools, this language interferes with our intentions around working together, embracing differences and honoring the individual gifts of each. Too often, it takes its toll.

Does this language serve us? Does it serve our school communities? Do we have any other choice?

Participatory Language

Three years ago I began learning a new model of communication most commonly known as Nonviolent Communication, or Compassionate Communication, the term I am using here. Compassionate Communication acknowledges Spectator language and gives us the freedom and choice to respond in a different way, a way that fosters connection. This alternative is called Participatory Language. It can help us unite in our shared commitments, honoring each person's voice, despite our unique backgrounds.

Participatory Language focuses on getting clarity on four key elements of communication: *observation, feelings, needs and requests*. We are asked to carefully observe specific behaviors or situations that are affecting us, sense what feelings are arising, identify the needs at the root of those feelings, and make clear requests to address those needs. Rather than analyzing what the problem is, implying who's fault it is, or devising strategies to get others to change their behavior or thinking, we focus on what is being observed, felt, and needed. We seek to *connect rather than correct*.

Imagine having the ability to respond to blame, judgment, or criticism by 'seeing' them as the tragic expressions of unmet needs. Imagine being able to stay connected and in process with others even when emotions flare up. Imagine this becoming possible simply through shifting your language and focus of attention. Each of us can do this. Furthermore, as we develop this capacity, we come to see ourselves and others in a new light, a wrong-free light, and it becomes possible to warm our interactions with greater compassion. Developing this capacity, which we call empathy, is the practice of Compassionate Communication.

Empathy

What is empathy? We know it is of recent origin, entering the English language in 1912. Baruch Urieli, co-author of Learning to Experience the Etheric: Empathy, the After-Image and a New Social Ethic, describes empathy as the "interest in and compassion for our fellow human beings. It enables us to extend our own inner being into that of the other person and directly experience something of his essential nature." He remarks that it was during the 1950s that the American psychologist Carl Rogers first used the term to cognize this new faculty emerging in the younger generation.

Dr. Marshall Rosenberg, who worked briefly with Rogers as a graduate student, went on to devote his life to developing the languaging and practice of empathy that forms the basis of Compassionate Communication. Dr. Rosenberg's book, Nonviolent Communication: A Language of Compassion, has now been translated into over ten languages.

The world is in an empathy crisis. Everywhere I travel I meet individuals who are longing to be understood, to receive some empathy for what it's like to be alive. Teachers need empathy for the enormous tasks they take up for our children. Parents need empathy for the challenges they face parenting in the modern world. Administrators and board members need empathy for the overwhelming needs they see in the schools and the limits of time, resources and support they might be experiencing. Children need empathy for all that comes up for them in the course of growing up. It is my hope that this booklet enlivens the activity of empathy and compassionate communication within our Waldorf schools.



"This quality of inner interest, which demands a kind of 'turning' toward another, is to be found in its most archetypal form in Parzival's words, 'Uncle, what is it that ails thee?' Whenever one human being is willing to take an active interest in the existence and destiny of another, to turn toward him, a glimmer of Parzival's question breaks through and enables the person asking the question to extend part of his own being beyond its usual boundaries." Baruch Urieli, Learning to Experience the Etheric World

PARTICIPATORY LANGUAGE & CONSCIOUSNESS: **FOSTERING UNDERSTANDING & PARTNERSHIP**

"The awakening through the soul of the other begins when attention is directed not only to the contents of another's words but to the soul gesture and soul movement which precedes the speaking."

Johannes Tautz, *The Meditative Life of the Teacher*



OBSERVATIONS

- Differentiate from **evaluations**.
- The stimulus, not the cause of my reaction.
- Factual, observable phenomena.
- What a video camera might record.
- Establishes a common ground.
- Remain open to clarification

FEELINGS

- Differentiate from **thoughts**.
- Thoughts interpret; feelings inform.
- Feelings are messages that point to our needs.
- We are responsible for our feelings.
- "I feel that..." & "I feel like...", or "I feel you/she/they..." are thoughts, not feelings.

NEEDS

- Differentiate from **strategies**.
- Needs are universal; strategies personal & specific.
- Needs are the root of our feelings.
- Needs are our shared, universal human nature.
- Identification of needs leads to understanding.
- Needs express the process of our becoming.

REQUESTS

- Differentiate from **demands**.
- Demands have conditions; requests don't.
- Use positive language when making requests.
- Make requests concrete & presently doable.
- Clarifies what's been heard, what feelings are present, or what action might meet the needs.

SPECTATOR LANGUAGE & CONSCIOUSNESS:

BEING RIGHT, AT ODDS & ALONE



"This language is from the head. It is a way of mentally classifying people into varying shades of good and bad, right and wrong. Ultimately, it provokes defensiveness, resistance, and counterattack. It is a language of demands."

Marshall Rosenberg, Nonviolent Communication

JUDGING

- Good/Bad & Right/Wrong
- Binary (i.e., Professional/Unprofessional)

BLAMING

- Thinking in terms of Wrongness
- Fault-Finding

LABELING

- Classifying & Categorizing
- Static Attributes & Stereotypes

OBEYING

- Denying Choice
- Denying Responsibility

ASSUMING

- Interpretations, Analyses & Diagnoses
- Jumping to Conclusions

SHOULD

- Inner/Outer "Shoulds"
- Deserve, as in Punishment & Reward

COMPARING

- Measuring, Testing, Grading & Tracking
- Competing for Winners & Losers

BEING RIGHT

- Convincing & Persuading
- Debating & Arguing



"To live in love of action, and to let live in understanding of the other's will, is the fundamental maxim of free human beings. They know no other "should" than the one with which their willing is intuitively in harmony."

Rudolf Steiner, Intuitive Thinking as a Spiritual Path

HOW WE LISTEN: FOUR CHOICES

We can choose how we listen to, and makes sense of, what comes to us. If we reflect a bit, we see that our choices have quite different results. Given our default languaging, we are likely to react out of habit. Through Compassionate Communication, we see that we have a choice.

For example, suppose someone says to us, "Do you have any idea how thoughtless you've been?" What are our choices?

When I hear this comment, I can choose to respond by...

Taking it personally. I internalize the judgment, blame myself for being thoughtless, tell myself I should be more thoughtful and begin a free fall toward shame, guilt and depression. I choose, "I'm at fault & to blame."

Concluding I'm under attack. I interpret what's been said as a critical judgment and react defensively. "That's not true. What about what you did!" I choose that the other person must be wrong & therefore to blame.

Or I have another option. I can choose to respond by...

Sensing my own feelings and needs. I can take a breath and connect to whatever might be stimulated in me when I hear what the other person is saying to me. I ask myself, "What am I feeling...frustrated, confused, scared? What am I needing...consideration, understanding respect?" I choose to empathize with myself. This is self-empathy.

Sensing the feelings and needs of the other. I seek to sense what the person is feeling...frustrated? What the person is needing...consideration?" I might guess to see if I understand them as they would like. If my guess "lands", the person will feel understood. If not, they will say it again. It's not about me guessing correctly. I can try again. I am choosing to empathize. This is empathy.

***Choosing consciously leads to greater
compassion, freedom, and connection
in all of our relationships.***



DIFFERENTIATIONS THAT CLARIFY OUR CHOICES



PARTICIPATORY

INTENT TO CONNECT—Goal is to create mutual understanding, enabling all needs to be met.

LIFE-SERVING—Tends to reconnect us to what is alive in the moment in ourselves, in others & in the world.

HEART—Thinking, speaking & listening from the heart. Sustaining connection.

BECOMING—Life is a process of eternal becoming.

CHOICE—Self-initiated activity in line with my own feelings, needs & values.

INTRINSIC MOTIVES—
Creating our own meaning & purpose while honoring the choices of others.

POWER WITH OTHERS—
Creating relationships where everyone's needs matter & are considered. Lasting solutions address everyone's needs.

VALUE JUDGMENTS—Based upon values & needs.

"GIRAFFE"—Has the largest heart of any land animal; its long neck suggests courage, vulnerability & a broad view, & saliva dissolves thorns!



SPECTATOR

INTENT TO CORRECT—Goal is to analyze situations, find what's wrong and correct it.

LIFE-ALIENATING—Tends to alienate us from what is alive in the moment in ourselves, in others & in the world.

HEAD—Thinking, speaking & listening from the head. Making judgments.

BEING—Life is analyzed into its intellectually grasped elements.

DEFY OR COMPLY—Reacting to external pressure. Conditioned to authority.

EXTRINSIC MOTIVES—
Conditioned to act either to gain approval or reward, or to avoid consequences.

POWER OVER OTHERS—
Creating relationships where one person exerts power over another through fear, guilt or shame. Solutions imposed.

MORALISTIC JUDGMENTS—
What's good/bad, right/wrong.

"JACKAL"—Packs organized based on the "top dog" enforcing hierarchical social structure; pack or gang mentality.

CORE FAMILIES OF FEELINGS



JOY & CONTENTMENT

Adventurous	Curious	Giddy	Loving	Satisfied
Affectionate	Delighted	Glad	Moved	Stimulated
Alive	Determined	Grateful	Overjoyed	Surprised
Amazed	Eager	Happy	Peaceful	Thankful
Amused	Ecstatic	Hopeful	Pleased	Thrilled
Astonished	Encouraged	Inspired	Proud	Touched
Calm	Excited	Intrigued	Refreshed	Tranquil
Confident	Fascinated	Invigorated	Relaxed	Trusting
Content	Friendly	Joyful	Relieved	Upbeat

FEAR & ANXIETY

Afraid
 Alarmed
 Anxious
 Apprehensive
 Bewildered
 Cautious
 Concerned
 Confused
 Disconcerted
 Disturbed
 Dubious
 Embarrassed
 Impatient
 Jittery
 Nervous
 Overwhelmed
 Panicky
 Perplexed
 Puzzled
 Reluctant
 Restless
 Scared
 Shocked
 Stressed
 Terrified
 Worried

ANGER & FRUSTRATION

Aggravated
 Agitated
 Angry
 Annoyed
 Appalled
 Cranky
 Disgusted
 Exasperated
 Frustrated
 Furious
 Impatient
 Indignant
 Infuriated
 Irritated
 Resentful
 Upset

SADNESS & GRIEF

Bored
 Depressed
 Disappointed
 Discouraged
 Disheartened
 Dismayed
 Despairing
 Exhausted
 Helpless
 Hopeless
 Hurt
 Lonely
 Melancholic
 Sad
 Tired
 Troubled

FAUX FEELINGS

*Interpretations
 masquerading as feelings*

Abandoned	Ignored	Neglected
Abused	Intimidated	Put Upon
Attacked	Invisible	Rejected
Betrayed	Let Down	Rushed
Bullied	Manipulated	Unappreciated

NEEDS & VALUES: RHYTHMS IN BECOMING



SUBSISTENCE

Clean Air & Water
Food
Rest
Shelter
Sustenance

PROTECTION/SECURITY

Fairness
Honesty
Justice
Keeping Agreements
Nurturance
Openness
Order
Safety
Space

PARTICIPATION

Accomplishment
Belonging
Capacity
Community
Competence
Connection
Dependability
Encouragement
Harmony
Interdependence
Opportunities to Help Others
Power With
Recognition
Respect
Support
To Enrich Life
To Serve Life
To Share Life's Joys & Sorrows

CREATION

Creativity
Expression
Inspiration

AFFECTION

Companionship
Friends
Intimacy
Kindness
To Matter to Someone

IDENTITY/MEANING

Acknowledgement
Appreciation
Challenges
Clarity
Dignity
Integrity
Learning New Skills
Privacy
Self-Development
Self-Mastery
Solitude
To Be Someone
To Make Sense of One's World

LEISURE

Celebration
Comfort & Ease
Play & Fun
Recreation

FREEDOM

Autonomy
Choices
To Speak One's Mind

UNDERSTANDING

Empathy

TRANSCENDENCE

Beauty to Behold
Goodness
Love
Peace
Rhythm
Spiritual Communion



EXPRESSING HONESTY

When I observe (see, hear, imagine or recall) ...? OBSERVATIONS

What am I observing that is stimulating these feelings that are coming up? What is (or isn't) contributing to my present well-being? I want to express this without mixing in my evaluations or thoughts about what is happening.

I'm feeling ...?

FEELINGS

What am I feeling? Am I clear that I am sharing a feeling rather than a thought or a mental image?

Because I'm needing/I value...?

NEEDS

What am I needing? What values might be in question? What's at the root of my feelings? What is the universal human need underlying my feelings?

Would you be willing...?

REQUESTS

What do I want to request from the other person that might meet or satisfy my need? Is my request positively framed and presently doable?



RECEIVING WITH EMPATHY

When you observe (see, hear, imagine or recall)...? OBSERVATIONS

Here we are listening for & clarifying what might be stimulating the other person's reactions.

Are you feeling ...?

FEELINGS

Here we are sensing what they might be feeling, checking to see if we are understanding clearly.

Because you're needing/you value...?

NEEDS

Here we are sensing what their needs might be. What might be alive for them in this moment or this situation?

I'm wondering if ...?

REQUESTS

Here we are guessing what they might be requesting that would meet or satisfy their needs.

TWO EXAMPLES OF EXPRESSING & EMPATHIZING

1. **PARENT SAYS TO TEACHER:** "The class is out of control & my daughter's miserable."

PARENT REPHRASES:

- **When I see** how unhappy my daughter is when she comes home and tells me about some things that happen to her at school, (observations)
- **I'm feeling** heartbroken and alarmed, (feelings),
- **Because I need** clarity about what's going on for my daughter. I need to know that she is safe & supported at school. (needs for clarity & doing what's best for one's children)
- **Would you be willing** to share with me what you see happening and the steps you're taking to foster harmony among the children? (request)

TEACHER REPLIES IN FRUSTRATION: "Parents expect teachers to work miracles. Parents are so busy they're barely involved."

PARENT EMPATHIZES:

- **When I bring** my concerns about Emily's unhappiness in school and some of the behavior she has described (observations),
- **Are you feeling** overwhelmed and frustrated? (feelings)
- **And needing** some understanding around the challenges you face as well as support for your efforts? (needs for understanding & support)
- **I'm wondering if** I've understood you the way you'd like and whether there's something more you'd like to share? (request)



2. **TEACHER SAYS TO PARENT:** "It seems like Jason is spending way too much time watching screens and he can't focus at all in class."

TEACHER REPHRASES:

- **When I see** how Jason struggles to stay focused on his school work and he tells me he spends a lot of time at home watching TV or on the computer, and I reflect on what I've read about sensory-integration and child development. (observations)
- **I feel** concerned and helpless, (feelings)
- **Because I need** support for my efforts to protect this process of human development that happens in childhood. (need for support)
- **Would you be willing** to tell me what you're hearing me say? (a request)

PARENT BLAMES HERSELF: "I'll never be a good enough Waldorf parent. I just can't do it all."

TEACHER EMPATHIZES:

- **When I share** my concerns about Jason and his difficulty staying focused in class and how it might be related to his screen time, (observations)
- **Are you feeling** overwhelmed and discouraged? (feelings)
- **Because you're needing** some acknowledgment for your efforts, and some understanding for how difficult it might be to make some of these changes at home? (needs for acknowledgment & understanding)
- **I'm wondering if** you'd like to schedule some time for us to talk about how we might work together to support Jason? (request)

AN INVITATION TO COMPASSIONATE CONNECTION

"What I want in my life is compassion, a flow between myself and others based on a mutual giving from the heart."

Marshall Rosenberg, *Nonviolent Communication*

We use the four steps—observations, feelings, needs and requests—in order to be understood, in order to understand others as they want to be understood, and to create the quality of connection that enables everyone to get their needs met through natural giving.

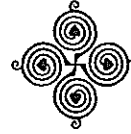
At first, the step-wise structure of the Participatory Language model is off-putting. I want to suggest a couple of ways to think of the model in the beginning, and add a gentle reminder. If it looks formulaic, think of it as a boat that you'll sail to the other shore, or a pair of shoes you'll wear until you can go inside, leaving them at the door. If it sounds stiff and clunky, you might remind yourself you're learning a new language which, of course at first, you'll speak with a very thick accent. Think of it as enabling you to first visit and then reside in this new, compassionate land. I assure you that a clear mastery of these elements will inevitably foster a compassionate, more participatory consciousness.



You saw in the examples on the previous pages that there are two reciprocal activities involved in a conversation—expressing what lives in us and seeking to “read” what lives in the other. At any moment we can choose to listen for feelings and needs. Self-empathy provides the basis for both expressing and receiving. Every conversation becomes a weaving back and forth. From a self-ful inner emptiness, we give our presence unto the other, seeking to connect to their becoming. As we integrate this into our lives, our schools will increasingly meet the needs for understanding, community and deep connection that we all long for. I hope this booklet has opened a door for you. I invite you to enter into the dance.



FOR FURTHER REFLECTION



"During the 1950s the American psychologist Carl Rogers noticed the presence of a new faculty in the younger generation for which he used a word originally coined in 1912: *empathy*. In fact, what he was describing is a process which has become part of the experience of an ever-increasing number of those born after the end of the Second World War. Empathy arises out of sympathy, love, interest in and compassion for our fellow human being; it enables us to extend our own inner being into that of the other person and directly experience something of his essential nature."

Baruch Luke Urieli, *Learning to Experience the Etheric World*

"When man faces man the one attempts to put the other to sleep and the other continuously wants to maintain his uprightness. But this is, to speak in the Goethean sense, the archetypal phenomenon of social science..." [This sleeping-into] "we may call the social principle, the social impulse of the new era: we have to live over into the other; we have to dissolve with our soul into the other."

Rudolf Steiner (11.10.1919)

"A person who wants to understand another has to be willing to be put to sleep by him for a moment. He is social insofar as he gives up his own consciousness & is filled by the nature of the other. Directly, however, his asocial drive rises up once again, throwing out the other to assert its self-consciousness. The other becomes the opposite, the object once again. Steiner calls this oscillation between the social and asocial moment—the *social archetypal phenomenon*."

Dieter Brüll, *Anthroposophical Social Impulse*

"Through training we can become aware of the subtle clues which are hidden in the form of a sense object and which reveal the way in which it came into being. The form then begins to reveal its motion of becoming, its gesture. Our vision shifts out of space and into time, the stage of the ongoing work. With a time vision we can experience all sense objects as verbs instead of as nouns. Each object becomes itself in time."

Dennis Klocek, *Seeking Spirit Vision*

"Individuality is always in the process of coming to be. The closer we can get to this sense of individuality, the more possible it becomes to also experience the world as always in the process of coming to be. To be able to stay in this creative realm in which we and the world are activity, whatever content is gained as a result of experience must be constantly relinquished as a tool to be used, for otherwise we are relying on what we already know, and are not usually conscious that we are confronting the ever-new. The challenge of encountering the world through individuality is to meet the world through what we are coming to be, not through what we already know. This challenge is particularly acute in the domain of relationships."

Robert Sardello, *Love and the Soul*

"He rose to his feet again and asked, "Uncle, what is it that ails thee?"

Wolfram von Eschenbach, *Parzival*

Serving all that...



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I really enjoy providing
Compassionate Communication
trainings for Waldorf communities
and other organizations.



I'm also working on a website
for people involved or interested in

Compassionate Communication, Anthroposophy & Waldorf Education,

I invite your participation when the website is ready
in early 2003. At that time, a PDF file of this booklet
will be available for download. Until then, I invite you to copy and
freely distribute this booklet.



Warmly,



John Cunningham



P.S. My deepest gratitude to Linda Wemhoff, without
whom this booklet wouldn't be. Her encouragement,
enthusiasm and commitment to clear simplicity met
my needs for collaboration & support.

Please visit her website at: www.RecipeForPeace.com.



The Center for Nonviolent Communication

For further information,
visit the website at www.cnvc.org



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LEARNING FROM RUDOLF STEINER:

THE RELEVANCE OF WALDORF EDUCATION

FOR

URBAN PUBLIC SCHOOL REFORM

Ida Oberman, PhD

September 2007

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EXECUTIVE SUMMARY

The author of this paper investigates the relevance of Waldorf education for public urban school reform. Based on analysis of survey data from over 500 graduates of private U.S. Waldorf schools, review of documents from the Gates Foundation, and staff-interview and student-achievement data from four public Waldorf-methods schools, she develops the following three-part argument:

1. New three R's and Waldorf:

Waldorf graduate survey data suggest that alumni identify something that might be summarized as "rigor," "relevance" and "relationship" as key outcomes of Waldorf education.

2. New three R's and urban public school youth:

The goals have shifted over the past ten years for funders and policy makers alike to encompass more than high test scores. Now, what was "special" for "special children" begins to gain attention as valuable for all. Bill Gates, Jr., and the Gates Foundation are leaders in articulating this shift. Founder and foundation argue for the new three R's for all. Importantly, for the purposes of this analysis, they backed up their talk with dollars. In 2007 they approved funding for the first public Waldorf methods high school, in the Sacramento Unified School District.

3. Three key findings on urban public schools with Waldorf methods:

- a. In their final year, the students in the study's four California case study public Waldorf-methods elementary schools match the top ten of peer sites on the 2006 California test scores and well outperform the average of their peers statewide.*
- b. According to teacher, administrator and mentor reports, they achieve these high test scores by focusing on those new three R's— rather than on rote learning and test prep—in a distinct fashion laid out by the Waldorf model.*
- c. A key focus is on artistic learning, not just for students but, more importantly perhaps, for the adults.*

The author concludes by outlining key areas for further research.

INTRODUCTION

Back in 1996, when asked how she looked at the Waldorf educational model, Michelle Fine, then distinguished speaker of the American Education Research Association's annual conference and education researcher, offered an answer that was clear and succinct: it is a "special philosophy for special children." She then proceeded to give a riveting talk on imagination and social action. The moment was telling. If one reads the words of Waldorf education's founding father, Rudolf Steiner (1861–1925), imagination and social action are at once the vehicle and the goal of Waldorf education. At its inception, Waldorf was not to be a special, "boutique" reform. Nor was it to cater to "special" children. Steiner called for a "Volks" pedagogy, a schooling of the people for the people bridging separate castes that had been hardened by emerging industrialization. Yet leading educators such as Fine regarded it in 1996 as special for the special.

At the time the notion of public, let alone urban public, Waldorf methods schools was largely unheard of. Times have changed. Just over a decade later, at the 2007 American Education Research Association's annual conference, an invited panel addressed the question of Waldorf education's relevance to the public sector. The room was full and questions from the audience were many. A shift had happened in the research community. The shift affected the perception of and the level of interest in Waldorf.

In that decade, interest had begun to mount both inside and outside the walls of the academy,. Reformers, parents and some policy makers are pushing for strategies that they feel are better able to help the system at large and individual students better meet the challenges of today. Increasingly diverse student populations and the new bars, under No Child Left Behind (NCLB), are perceived by these parties to task us to make sure schools are not just places where students learn to do homework assignments but venues where students and adults can feel they are being shaped in a way that is meaningful to them as individuals and members of a community. Today, particularly in urban schools, youth face a growing number of challenges as they cross to mature adulthood. Arts education is seen increasingly as a key resource to provide support, particularly to urban youth, in this crossing.¹ With this rising tide, Waldorf is gaining recognition as one kind of schooling that offers greater sensitivity to education as an art. In the words of acclaimed Stanford researcher Elliot Eisner,² "Waldorf schools, unlike most American public schools," afford children "a balanced educational diet" focused on academic achievement and "the development of imagination."

As interest is growing, so is the number of public urban Waldorf methods schools. Since the founding of the first public Waldorf School, Urban Waldorf in Milwaukee's inner city in 1991, in a small but growing number of venues public Waldorf methods schools are popping up like poppies from the ground. By 2000, California saw approximately ten public Waldorf methods schools and Arizona two. As of 2007, there are roughly forty in the country.³ The number of Waldorf teacher training programs equipping graduates to teach in public schools is growing apace with two in California alone: Rudolf Steiner College's Public School Institute (<http://www.steinercollege.edu/psi.html>) and the Bay Area Center for Waldorf Teacher Training (<http://www.bacwtt.org/index.htm>). Importantly, public urban Waldorf-methods⁴ schools are beginning to capture the attention of national foundations. The Gates Foundation has in 2007 offered funds to the Sacramento Unified School District to start the first public Waldorf methods high school in the

¹ Fiske, E. B. (Ed.), 1999, *Champions of Change: The Impacts of the Arts on Learning*, Washington, DC: Arts Education Partnership; James, N., 2005, "Act up!" *Theatre as Education and Its Impact on Young People's Learning*, Centre for Labor Market Studies Working Paper (no. 46); Uptis, R. & Smithrim, K., 2003, *Learning through the Arts: National Assessment 1999–2002. Final Report to the Royal Conservatory of Music*. Kingston, Ontario: Arts Matters, Faculty of Education.

² Eisner, E., 1994, *Cognition and Curriculum Reconsider*, New York: Teachers College Press.

³ See Appendix 1, Figure 11 for chart tracking rate of growth of public Waldorf-methods, or Waldorf inspired, schools in the U.S. See Appendix 2, Tables 2 and 3 for working index of public Waldorf-inspired schools.

⁴ With the term "Waldorf methods school" we refer to schools that *by their own report* are committed to the educational principles of Waldorf education. It is important to note that the definition is *by self-report*. There is currently a debate underway on whether such schools should call themselves 'Waldorf inspired' rather than 'Waldorf methods' schools.

country. As of August 2007, a building has been secured and the Waldorf Methods/Social Justice High School is slated to open in 2008.⁵

With the increase in interest and the growing number of schools, the need for robust research becomes all the more urgent. One particularly important question at this juncture is: *What grounds do we have for thinking that Waldorf might be of relevance in the broader context of education, and particularly in the context of education reform for the traditionally underserved in our urban schools?* That question is the focus of this paper.

To get to the bottom of the question, we will:

- In Part 1: Listen to the voices of Waldorf graduates from the past half century. To that end we will review a set of survey data.
- In Part 2: Consider the program priorities of the Gates Foundation along with its 2007 decision to fund the first public Waldorf methods high school in Sacramento Unified.
- In Part 3: Review achievement test data from four elementary public urban Waldorf methods schools in California, along with educators' reflections on how they explain their schools' achievement trends.
- In Conclusion: Reflect on lessons and areas for further research.

Conceptual framework For its conceptual frame, this article draws on a body of research synthesized in the 2003 report from the National Research Council and the Institute of Medicine of the National Academies, titled *Relationships, Rigor, and Relevance: The Three R's of Engaging Students in Urban High Schools* (hereafter called the National Academies report). In the words of the December 2003 press release on this programmatic study,

High schools that successfully engage students in learning have many things in common. They set high academic standards and provide rigorous, meaningful instruction and support so that all students can meet them. Their structure makes it possible to give students individual attention. The teachers take an interest in students' lives, drawing on their real-world experiences and current understanding to build new knowledge. Teachers also show students the connections between success in school and long-term career plans.⁶

The choice of this frame is strategic for the purposes of our discussion. Also the Gates Foundation, the world's largest education funder, and funder for the first public Waldorf-methods high school, adopted the same frame. When in 2005 the Gates Foundation adopted this framework to define its funding priorities, it refined the new three R's as follows:

⁵ Personal communication with Cheryl Eining, principal of John Morse Elementary School, Sacramento Unified, August 30, 2007.

⁶ For press release, executive summary and full report, see News: The National Academies, *Relationships, Rigor, and Relevance: The Three R's of Engaging Students in Urban High Schools*, December 2, 2003 <www8.nationalacademies.org>.

Rigor: All students need the chance to succeed at challenging classes, such as algebra, writing and chemistry

Relevance: Courses and projects must spark student interest and relate clearly to their lives in today's rapidly changing world

Relationships: All students need adult mentors who know them, look out for them, and push them to achieve.⁷

Core argument We will use this lens as point of entry to assess the relevance of Waldorf to public school reform. Based on our analysis, the Waldorf model focuses on engagement through rigor, relevance and relationship. Further, we argue, it enriches the discussion on these three conceptual categories. Specifically, the student performance and interview data suggest that the Waldorf model offers aspects that were not emphasized in the National Academies and Gates discourse but, we suggest, expose a richer meaning of rigor, relevance and relationship to which Waldorf practices actually make a distinctive contribution to public school reform.

Methodology The study blends quantitative and qualitative methodologies. The quantitative analysis considers student achievement data from 2000 until 2006. The quantitative and qualitative analysis draws on the recently released Survey of Waldorf Graduates, spanning 1943–2005,⁸ and interview data from four public urban Waldorf method sites.

PART 1: SPECIAL EDUCATION FOR SPECIAL STUDENTS?

A LOOK AT THE SURVEY OF WALDORF GRADUATES 1943–2005

Background Waldorf education is based upon the educational philosophy of Rudolf Steiner. It focuses on an imaginative approach to learning and aims to develop holistic thinking that includes creative as well as analytic thought. Arts are a central part of curriculum, instruction and school design. In the words Henry Barnes, founding teacher of the first Waldorf school in America—on New York City's Upper East Side—Waldorf education aims to develop “head, heart and hand.”⁹ The ultimate goal is to provide young people the basis with which to develop into free, moral and balanced individuals.

Indeed, this all sounds relatively boutique. But even before beginning to make inroads into the U.S. public urban school reform arena, Waldorf has moved beyond a narrow niche market to reach more broadly around the globe. It is already one of the largest independent educational systems in the world. Waldorf

⁷ See Gates Foundation Website

http://www.gatesfoundation.org/UnitedStates/Education/RelatedInfo/3Rs_Solution.htm.

⁸ *Survey of Waldorf Graduates, Phase II*, Mitchell & Gerwin, Research Institute for Waldorf Education, 2007. Note: For purposes of the discussion offered below, see in particular the chapter, “Statistical Analysis,” pp. 67–94 <http://www.waldorfresearchinstitute.org/pdf/WEPhaseII0307.pdf>.

⁹ Personal interview, October 21, 2006.

education is practiced in more than 950 established independent, private Waldorf schools located in about sixty-three countries.¹⁰ However, the focus of this study is to probe beyond numbers of private Waldorf schools. What is Waldorf education yielding? Do the suggested outcomes of Waldorf point to qualities that might be marked “special” in ways that can be relevant beyond private, boutique schools to public urban schools and their children?

For the longest time the effects of a Waldorf education were only anecdotal. Now is an exciting time to address the question of outcomes for Waldorf graduates, because in March 2007 a first-of-its-kind quantitative study was published by the New Hampshire-based Institute for Waldorf Research under the title *Survey of Waldorf Graduates, Phase 2*. Unprecedented, the report offers analysis of surveys completed by just over 500 alumni, spanning graduation years 1943–2005 and counting graduates from twenty-seven private Waldorf schools. The question asked of that data is: What do graduates report as the key results of their education? Respondents were asked to reflect on both positive and negative consequences.¹¹ Three patterns emerged from the data, one related to *rigor*, one to *relevance*, and one to *relationship*.

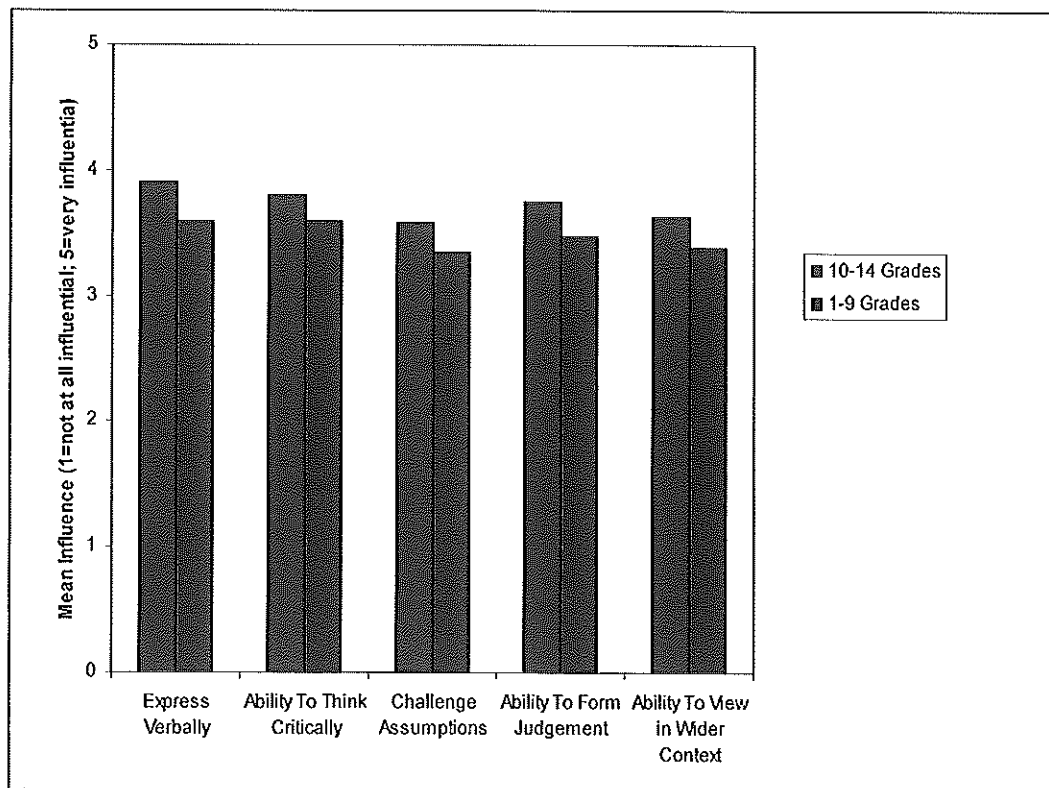
¹⁰ See Appendix 1, Figures 5 and 6 for growth rates of private Waldorf schools globally and in the U.S.

¹¹ A note on limitations of the survey: The sample size is small (N = 526) and due to lack of resources rather than volition, the researchers worked without a control group. As well, the participants were drawn from the records of Waldorf schools. These schools, not atypical of any school, were uneven in their ability to remain in contact with their graduates, so the body of respondents represents a pool of the willing—those willing to stay in touch with their alma mater and to take the survey. All that said, the data set nevertheless offers a first invaluable look at this group’s reflections on what their education did and did not yield.

Waldorf graduate survey data

A. Rigor

Figure 1. Rigor: Graduates with more years of Waldorf reported greater influence on their ability to do independent analysis



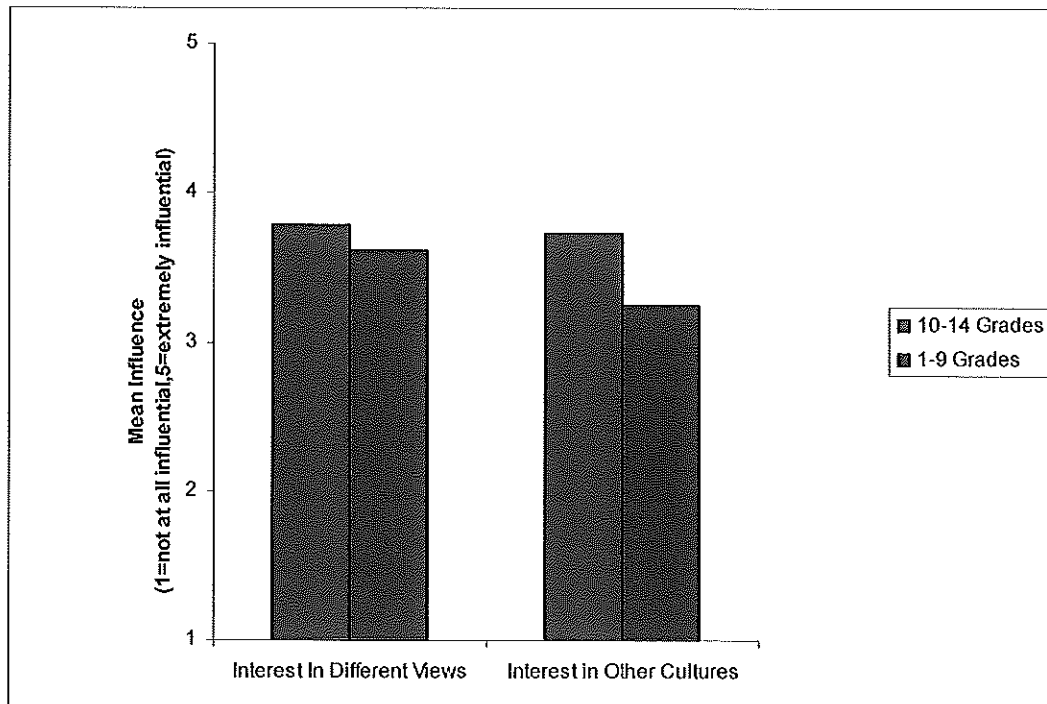
Source: Survey of Waldorf Graduates, Phase II.

Figure 1 shows that Waldorf graduates with ten to fourteen years in a Waldorf school (left column) ranked the level of Waldorf influence on their own development higher in the areas of ability to think critically, form judgments, challenge assumptions and view a wider context.

B. Relevance

Figure 2. Relevance:

Graduates with more years of Waldorf reported greater influence on their ability to serve as global citizens



Source: Survey of Waldorf Graduates, Phase II.

Figure 2 shows that Waldorf graduates surveyed with ten to fourteen years in a Waldorf school (left column) ranked the level of Waldorf influence on their own interest in different views and interest in other cultures higher than did Waldorf graduates with one to nine years at a Waldorf school (right column).

C. Relationship

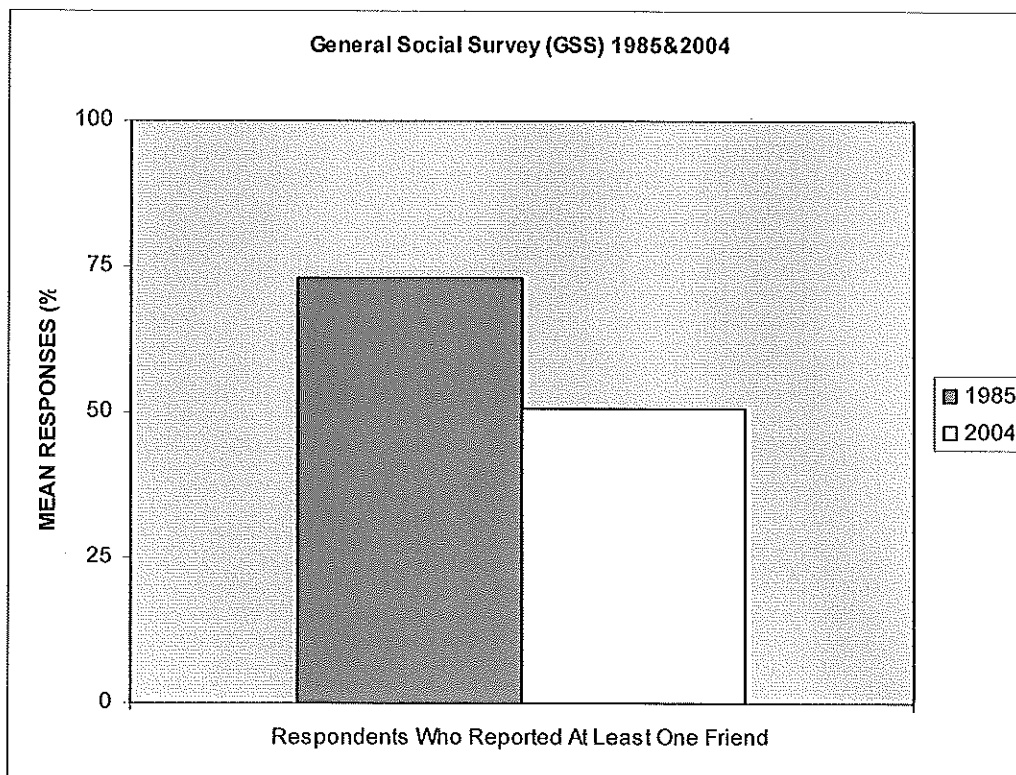
Finally, we turn to relationships. This last aspect is of special note because recent research has signaled growing isolation among Americans nationally. To illustrate this national trend, before we turn to the Waldorf graduate survey data, we offer below two sets of national survey data. These two data points provide a useful foil for the data on Waldorf graduates on time spent with friends and watching TV.

- **National trend: FEWER relationships, MORE bowling alone**

We need only think of the stark challenges to American community that Harvard professor and bestselling author Robert Putnam outlined in 1994 in *Bowling Alone*.¹² He conducted his analysis on the basis of the General Social Survey (GSS) data administered from 1972 to 1994 and identified, in his words, "the strange disappearance of civic America."¹³ Based on GSS survey data from the following decade, 1994–2004, in an elegant piece of analysis Duke University researcher Miller McPherson and colleagues discovered an alarming trend: Americans were becoming more isolated still since 1994.

Figure 3. Relationship:

Growing decline in number of people with whom we have a relationship 1985–2004¹⁴



¹² *Bowling Alone: The Collapse and Revival of American Community* by Robert D. Putnam (New York: Simon & Schuster, 2000).

¹³ Putnam, R. D., "The Strange Disappearance of Civic America," *The American Prospect* no. 24 (Winter 1996) <<http://cpn.org/prospect/24/24putn.html>>.

¹⁴ McPherson et al., *Social Isolation in America, Changes in Discussion Networks over Two Decades*, June 2006 <<http://www.asanet.org/galleries/default-file/June06ASRFeature.pdf>>.

Source: McPherson et al., *Social Isolation in America*.

Figure 3 shows that in 1985 (left column) almost 25 percent more respondents reported they had at least one friend when compared to respondents in 2004 (right column). The report authors indicate that in 2004, a quarter of Americans say they have no one with whom they can discuss personal troubles, more than double the number who were similarly isolated in 1985, and that, overall, the number of people Americans have in their closest circle of confidants has dropped from around three to about two.¹⁵

- **National trend: MORE TV watching**

Researchers Aguiar and Hurst's 2006 report on trends in leisure time use joins others in confirming that the rate of TV watching has grown steadily during the past five decades.¹⁶ Further, according to the ACNielsen company's 2001 report, the average American watches more than four hours of TV each day (or twenty-eight a week, or two months nonstop TV-watching per year). A person who lives for sixty-five years will have spent "nine years glued to the tube."

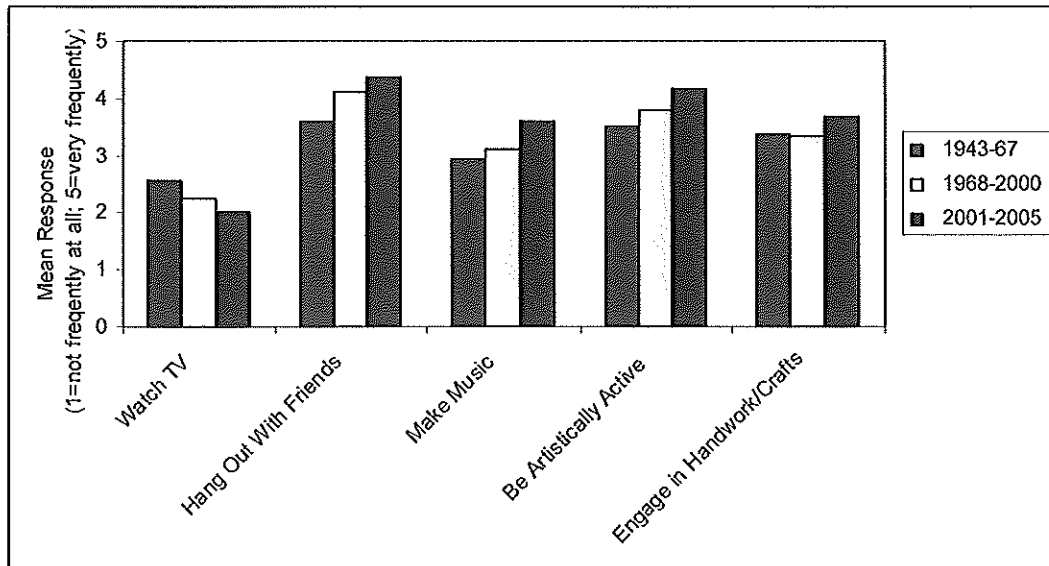
- **Trend among Waldorf graduates: MORE time with relationships, LESS with TV watching**

Against this background, the findings concerning Waldorf graduates come into particularly sharp relief.

¹⁵ See Shanker, Vedantam, *Washington Post*, June 23, 2006, p. A03.

¹⁶ Aguiar & Hurst, *Measuring Trends in Leisure, The Allocation of Time over Five Decades (January 2006)*. For download go to <<http://www.bos.frb.org/economic/wp/wp2006/wp0602.pdf>>. For an engaging brief on this report, see Steve Boyd, *Out of Time But Watching More TV*, April 2006 http://www.stoweboyd.com/message/2006/04/free_time_we_ar.html.

Figure 4. Relationship: Waldorf graduates over the cohort years report less TV watching and more hanging out with friends and artistic activity
(combining categories of artistically active and handwork/crafts).



Source: Survey of Waldorf Graduates, Phase II.

The data suggest an impact on what might be categorized as rigor, relevance and relationship reported by Waldorf graduates.

How does that help us with our question about the relevance of Waldorf in the urban public school setting? We turn now to the words of Gates Foundation co-founder Bill Gates, Jr., and the program priorities of the Gates Foundation.

PART 2. FOR SPECIAL KIDS ONLY? IN 2007, GATES FUNDS FIRST PUBLIC, URBAN WALDORF METHODS HIGH SCHOOL

Rigor, Relevance and Relationship: The New Three R's, Funders' Perspective

are these qualities? How special should they be? Let us listen for a moment to Microsoft founder and chairman Bill Gates, Jr., when he addressed his alma mater, the elite private Lakeside School in Seattle in September 2005.

How "special"

Bill Gates' Vision

Gates applauded Lakeside because he could "directly trace the founding of Microsoft back to [his] earliest days here."¹⁷ He recounted the rigor of Lakeside's instruction, "making sure all students are given challenging curriculum that prepares them for college and work." He commended further the relevance, "making sure kids have courses and projects that clearly relate to their lives and their goals." Finally he saluted the relationships, "making sure kids have a number of adults who know them, look out for them, and push them to achieve." At this moment in his address, Gates directed the gaze of his audience pointedly beyond the grassy lawns of this academy when he concluded: "We have invested nearly a billion dollars to re-design high schools around the country to help create an environment where students achieve at a higher level and never fall through the cracks." In asking, "What does this have to do with Lakeside?" he answered his own question: "Our foundation's work in high schools is based on principles that happen to be deeply ingrained in Lakeside's culture. We call them the new three R's, the basic building blocks of better high schools."¹⁸

Gates Foundation Investment in Urban Public Waldorf High School Experiment

In step with the vision of its founder, the Gates Foundation is investing in research and evaluation to find the ingredients that will ready all students for college, career and citizenship.¹⁹ One of those investments has gone to launch the first public Waldorf methods high school, in Sacramento. The Gates Foundation is poised to put Waldorf to the test. At the time of this writing, the Sacramento School Board and district have approved funds and facility and a principal for the Waldorf Methods/Social Justice High School, a Gates-funded, small public Waldorf method high school in the Sacramento Unified School District. It is the first public Waldorf-methods high school in the United States.

PART 3: HOW ARE THEY MEASURING UP? CASE STUDY FINDINGS FROM FOUR PUBLIC WALDORF METHODS SCHOOLS

We turn finally from the self-report from private Waldorf graduates and the noted interest of leading funders to the public Waldorf methods schools themselves. Are they measuring up? In this section, we consider student annual test scores and educators' reports. The guiding questions are two:

1. How are their students doing on state tests, and
2. What are their educators saying to explain their achievement trends?

What we did

We sampled urban public Waldorf-methods schools, choosing the sample according to geography and district size. We also sorted by those who were meeting or outperforming the top ten schools in the state with comparable demographics on the state's annual test, the California Standards Test

¹⁷ Bill Gates, Jr., September 23, 2005, <http://www.lakesideschool.org/give/campaign/BGatesKeynoteAddress.pdf>.

¹⁸ Bill Gates, Jr., September 23, 2005, <http://www.lakesideschool.org/give/campaign/BGatesKeynoteAddress.pdf>.

¹⁹ Eric Robelen, "Gates Learns to Think Big," *Education Week*, October 11, 2006.

(CST). The final sample consisted of four schools. Next, we reviewed school and district documents. Finally, we interviewed teachers and administrators. In each case we asked,

- To what do you attribute your success?
- What were the key ingredients if you were to boil them down to three?
- What is the biggest challenge moving forward?

Table 1. Case Study Sample: Four Urban Waldorf Methods Public Schools, 2006

School	District	Location Characteristics	Student Body Characteristics					
John F. Morse Elementary	Sacramento Unified	Large City	19%	16%	59%	11%	38%	4%
Woodland Star Charter	Sonoma Valley Unified	Urban Fringe/Midsized City	12%	6%	76%	6%	16%	2%
Stone Bridge Elementary	Napa Valley Unified	Urban Fringe/Large City	5%	5%	87%	3%	8%	1%
Novato Charter	Novato Unified	Urban Fringe/Large City	5%	3%	84%	8% ²⁰	-	3%
			Latino	African American	Caucasian	Other	Free & Reduced Price Lunch	English Learners

What we learned We found a similar student performance pattern in all four schools. Each of the four sites performed well below their peers in second grade. By the last year of school, however, they matched or exceeded the top ten of peer-comparable sites. This pattern holds when looking at either English Language Arts or Mathematics on the CST. When asked *how* the sites explained the high performance levels in the upper grades, the responses aligned with the National Academies and Gates Foundation terms.

The three conceptual elements aligned with the responses of public Waldorf methods principals, mentors and teachers:

- ***Rigor***
- ***Relevance***
- ***Relationship***

Based on interview data, we found, though, that the Waldorf model offers aspects that were not in the foreground in the National Academies and Gates discourse but, we suggest, expose a richer meaning of rigor, relevance and relationship to which Waldorf practices actually make a distinctive contribution.

The academy and Gates define rigor as curricula that prepare students for college and work. In our interviews, teachers stress the preparation of lower grades for higher grades year by year. Similarly, the Academy and Gates define relevance as connecting formal education meaningfully with people's lives and goals. However, the sort of relevance mentioned by our Waldorf teacher interviews goes

²⁰ The data reported here on % eligible for free & reduced price lunch at Stone Bridge are drawn from school site data. The California Department of Education (from which Just for the Kids drew their data) posted 0 % eligible.

Ida Oberman idaoberman@alamedanet.net September 12 2007

in a different direction: the relevance of one academic subject for another, such as art to math, math to history, history to art. Finally, the Academy and Gates define relationship as students having adult mentors who know them, look out for them and push them to achieve. Waldorf teacher interviewees speak of a relationship that extends well beyond one, two or even four years to eight and to a relationship with a student and a whole class over this extended period of time. Finally, when asked about the key *ingredients* for implementing these new three R's, one theme ran through all the answers:

- **A Focus on artistic activities for**
 - **Student learning and**
 - **Adult learning.**

Data Source, How to Read the Data & Important Caveat

Data source: Where not otherwise noted, the source for all data in Part 3, Cases 1–4 is Just for the Kids California-<http://www.jftk-ca.org>

On how to read the data: The far left column shows the school, followed by state, region and county. The bottom row (blue) is percent of students scoring below basic; the middle row (green) is percent of students scoring basic; and the top row (beige) is percent of students scoring proficient and above proficient.

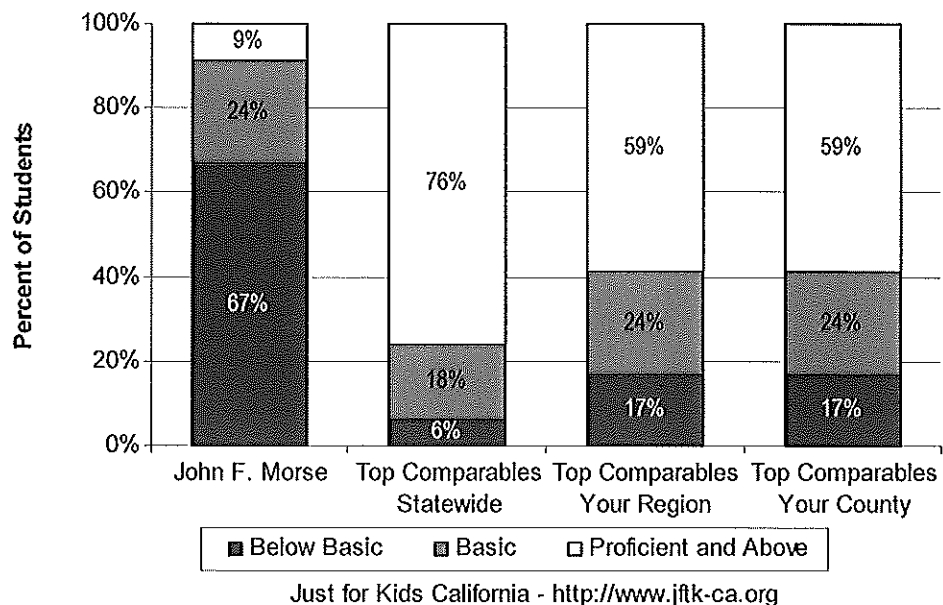
Important caveat: Comparisons are NOT to the state average but with the top ten peer-alike sites.

Case 1: RIGOR AND THE ARTS — Figure 5, a-d

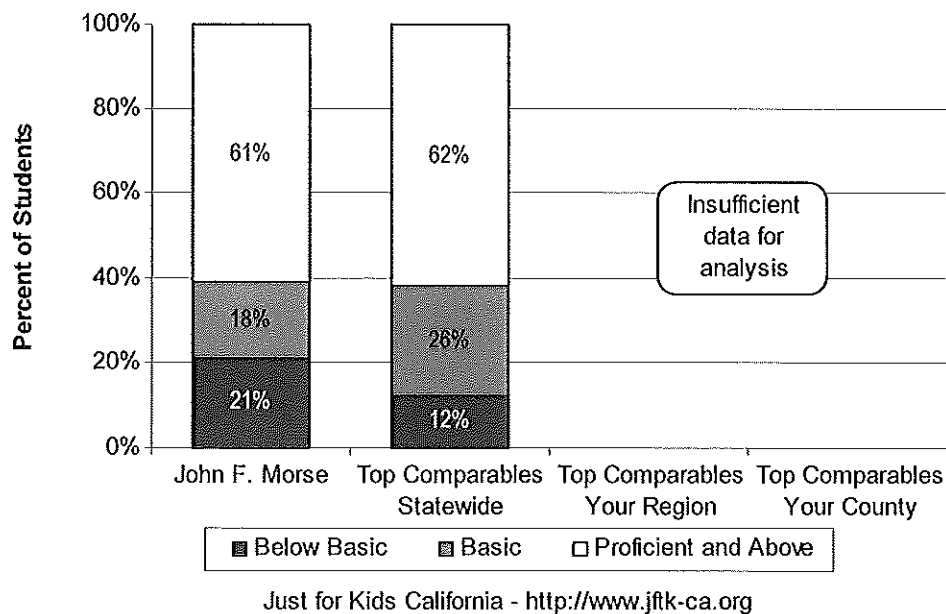
Large City: John F. Morse, Sacramento Unified

Free/Reduced School Lunch: 38% Hispanic: 19%
English Learners: 49% Black: 16%

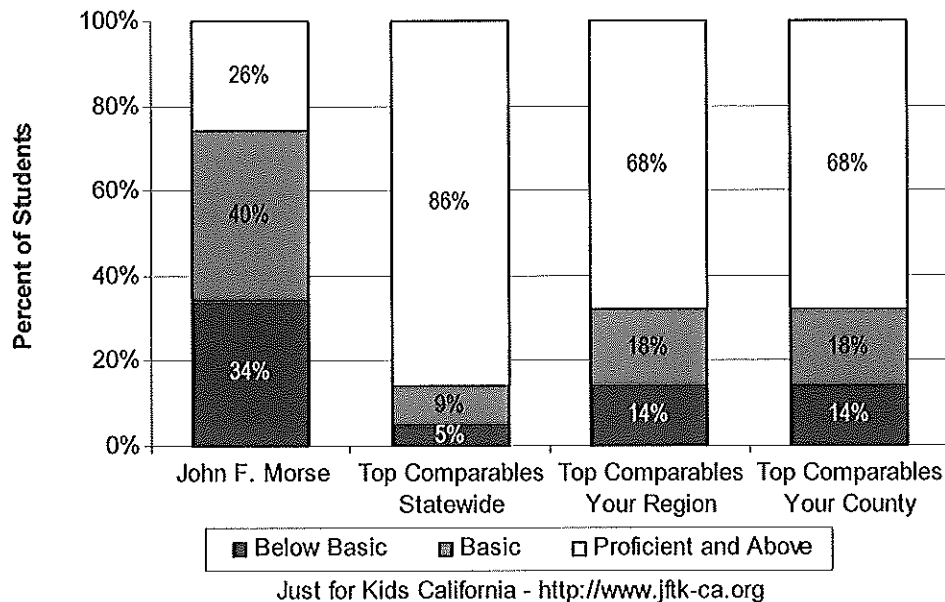
a. Grade 2 Language Arts 2006 Results



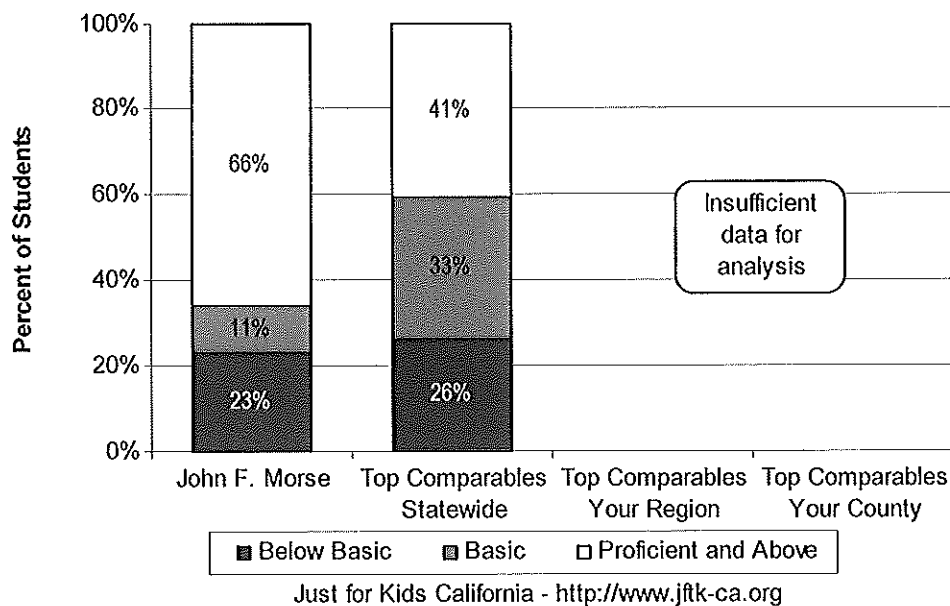
b. Grade 8 Language Arts 2006 Results



c. Grade 2 Mathematics 2006 Results



d. Grade 8 Mathematics 2006 Results



The John Morse data show an identifiable trend: In second grade in both English Language Arts and Math John Morse underperforms its top ten peer-alike sites. Come eighth grade, John Morse students outperform students at the school's top ten peers.

When asked how they explained the pattern, teachers, mentor and administrators indicated that test-taking strategies were rarely used in the early grades. In the words of one John Morse lower grades teacher, "Our focus is developmental. ... [I]n the lower grades we focus on instilling beauty, joy and self-confidence in learning. . . . It's a focus on capacity

building. That readies them to acquire the skills, which is the focus of the upper grades." The teacher described the artistic activities the students engaged in as they were introduced to mathematics, reading and writing absent textbook or work sheet. Those include moving, drawing and jumping rhythmically. She added: "But in all we do in second grade we are thinking about the child's needs in eighth grade. We are laying groundwork." She knew of what she spoke. She had taken a class to eighth grade and was now moving with her new class again from first grade up. The 2006 eighth grade teacher whose students outperformed the state on the CST agreed and added: "I never once referred to any test preparation materials... There [was] complete avoidance of math textbooks kindergarten through the end of grade five." She underscored the role of arts: "In sixth grade mathematics was still ... done through story, movement and concrete experience.... [And from] kindergarten through grade 8 singing was central to their daily school life. In grades one through three the pentatonic flute was taught; we then switched to diatonic flute for grades four through six. In grade four they all learned violin; in grade five the strings teacher split them up into viola, cello and violin; they played through grade eight." She added, "They also learned Baroque recorders in grade eight."

A John Morse teacher mentor elaborated the thinking behind these Waldorf methods: "When thinking about building capacity, we might think of building the sense 'I can.' That is where we need to focus in the lower grades. Later we focus on skills, on the 'I do.' To understand what capacity is in mathematics, or number sense as some call it, think of this example: If you have number sense, you know that when you multiply a two-digit number with another two-digit number (for example 28×17) and you get a 5-digit number (for example 53,000), you see with your capacity that that cannot be right. You have your bearings in the world of numbers and know this. In the lower grades the teacher tries to nurture the capacity and of course in the end your aim is to get the skills in place....The road to skills is through moving, drawing, jumping to learn the numbers. In this way you enhance the capacity, or number sense." She concludes that this is a worthy investment: "The more capacity, or number sense, you build in the lower grades, the quicker you can later build skills." Certainly the performance patterns in mathematics at John Morse bear this out. To sumup, by their teachers' and their mentor's report, these students' high performance in mathematics standardized tests in 2006 was not because the students abandoned the arts or submerged them in test prep. Learning was scaffolded over the years. The focus was first on capacity building, then on skills with the arts as the medium. Through this medium, the message was brought multiple times—with rigor.

Focus on rigor When asked to identify three key ingredients that make the school successful, principal and teachers pointed to a culture of *rigor*. Says Principal Cheryl Eining,

"Currently in traditional education, direct instruction is the latest buzz word. In Waldorf education, direct instruction is a given and I personally feel one of the strengths of the program. Waldorf teachers are champions of delivering instruction directly to students. They individually research and study the curriculum being presented. There is no such thing as 'open your textbook to page 10,' nor 'answer the questions at the end of the chapter.' During main lesson time, the first two hours of the day, usually 9 to 11 a.m., learning is hands-on, exploratory and experiential, rather than simply being told a rule, fact or concept directly. Students record their discoveries and learning in main lesson books, but rarely if ever will be seen filling in blanks on a worksheet. Students will be involved in listening to a related curriculum story being told by the teacher, engaged in mental math, word games, moving to the action of a poem/song or planting seeds in the garden. Learning is brought to the students in a meaningful way, which will hopefully be longer lasting and not limit their thinking. When instruction comes from a real person, a higher level of ownership and rigor is involved in the learning."

Rigor and the arts for students A key component of the Waldorf methods curriculum is the arts, which address a variety of learning styles in children. Eining reflects, "Some form of the arts is embedded in nearly every element of the

Waldorf classroom. Our children are not accustomed to idle sitting for a majority of their day. The diversity and color created by children is such a joy. Even at a young age, if left alone without others' preconceived idea of what a house or tree looks like, a child can manufacture eloquent pieces of art representing their learning. The artistic work also provides students practice in staying at a project with rigor." Adds Eining,

A teacher can pull out a row of knitting and ask students to try again until they are satisfied with their piece. Pride and completion of work is essential, and doing as good a job as they can is equally important be it knitting or mathematics....Last week the handwork teacher was cleaning wool collected from a sheep-shearing fieldtrip with the third grade class. It's incredible to watch the kids' eyes light up when they dye it with homemade dyes made from vegetable skins. Students are engaged in their work and excited to see the finished product. They get the sense of what it is to do something well from start to finish....

She sums up, "Art brings curriculum into a meaningful place."

Rigor and the arts for adults

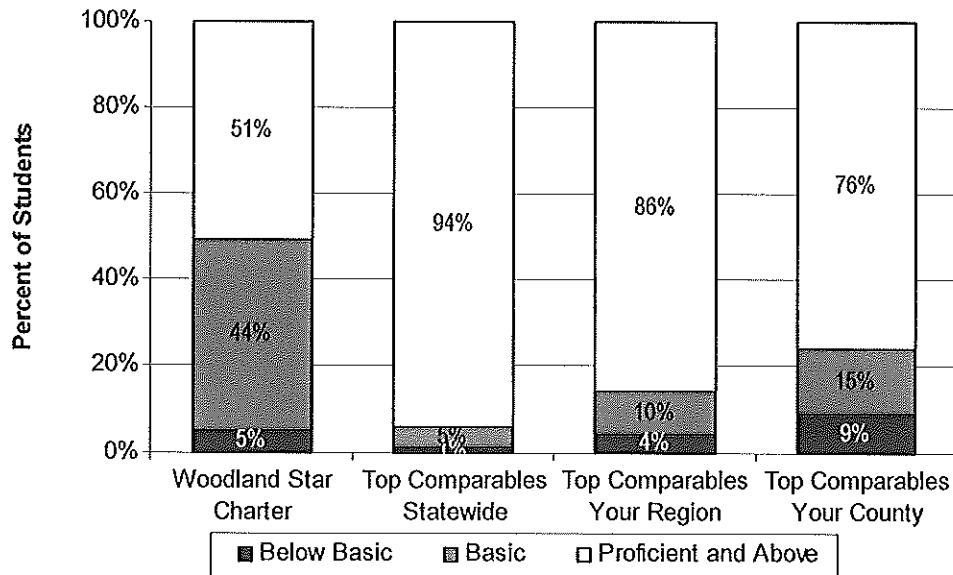
At John Morse, art is not a stand-alone subject. Artistic activity for the adults is a key ingredient for a healthy invigorated teacher. "We have Thursdays each month for staff to work together," reflects Eining. "Two are for staff meeting all together and one in small groups where faculty work on curriculum. In faculty meetings, we often sing together, then aim to do an artistic activity like felting, sculpting or painting. Then we turn to business. [The art] is critical.... It allows us time to breathe from our day-to-day routine and create beautiful images together and [be] more refreshed to meet the child the next day." When asked, she elaborated: "It's that idea of life-long learning. Not every adult has the same ability to sing, paint, etc. It is common for our teachers to take the area most difficult for them personally and work through it sometimes in a painstaking manner. Finally," she concludes, "it's also about putting yourself in students' shoes and gives us a sense of what they experience with new learning." The second grade teacher adds, "The artistic work is part of capacity building." This teacher shared how she does painting at home to restore herself after a day of teaching, and even traveled again to Jordan after a Fulbright there to help other students paint....as a way to build their capacity. "And they'd never picked up a paintbrush before...but in a few lessons learned the basics of color theory as well as problem-solving as they endeavored to create with the color," she concluded. In sum, art at John Morse is not only for the students. For students and adults alike, it builds capacity to do rigorous work, problem solve, think, and take on daily challenges with an open willing heart.

CASE 2: Relevance and the Arts – Figure 6, a-d

Urban Fringe, Mid-Size City: Woodland Star Charter, Sonoma Valley Unified

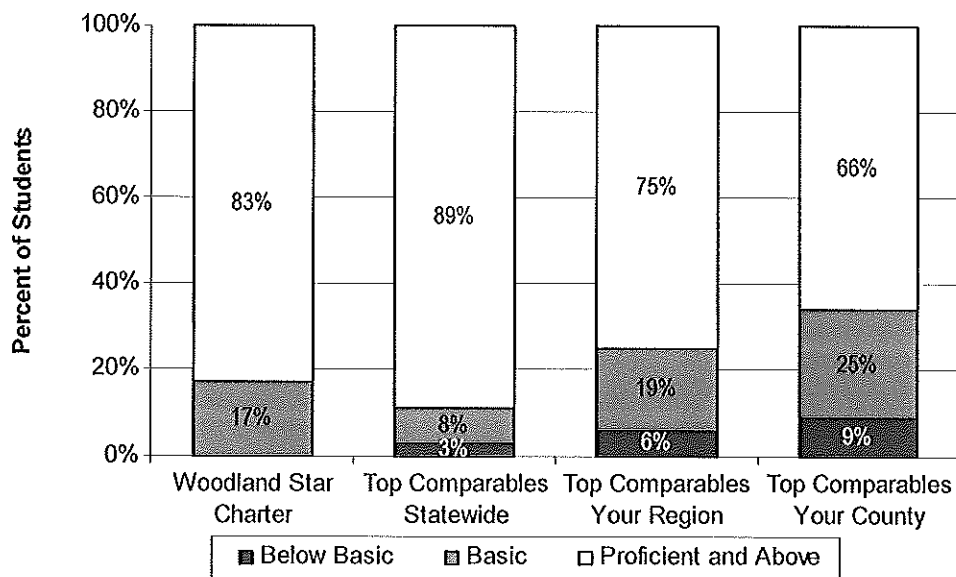
Hispanic: 12%

a. Grade 2 Language Arts 2006 Results



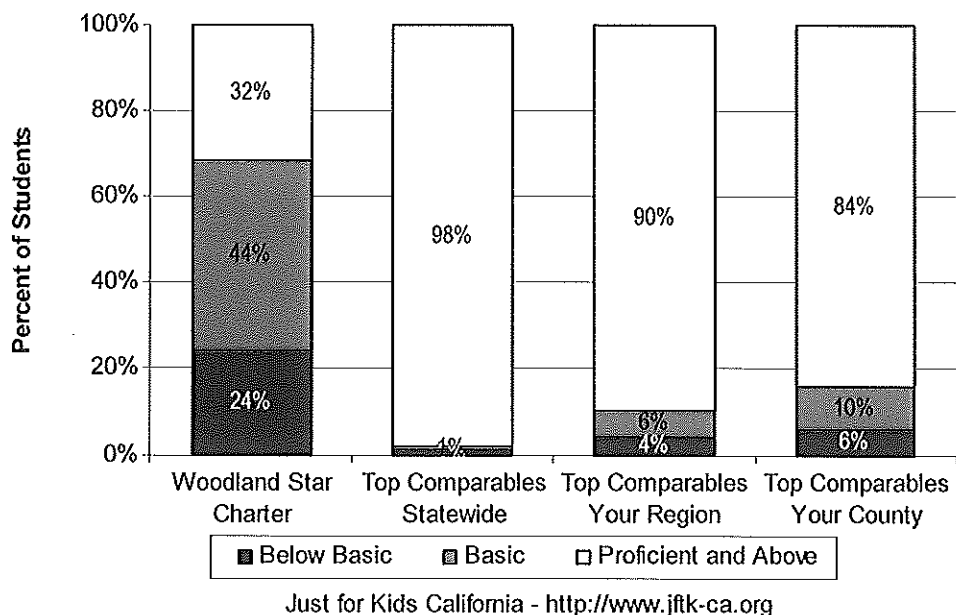
Just for Kids California - <http://www.jfk-ca.org>

b. Grade 8 Language Arts 2006 Results

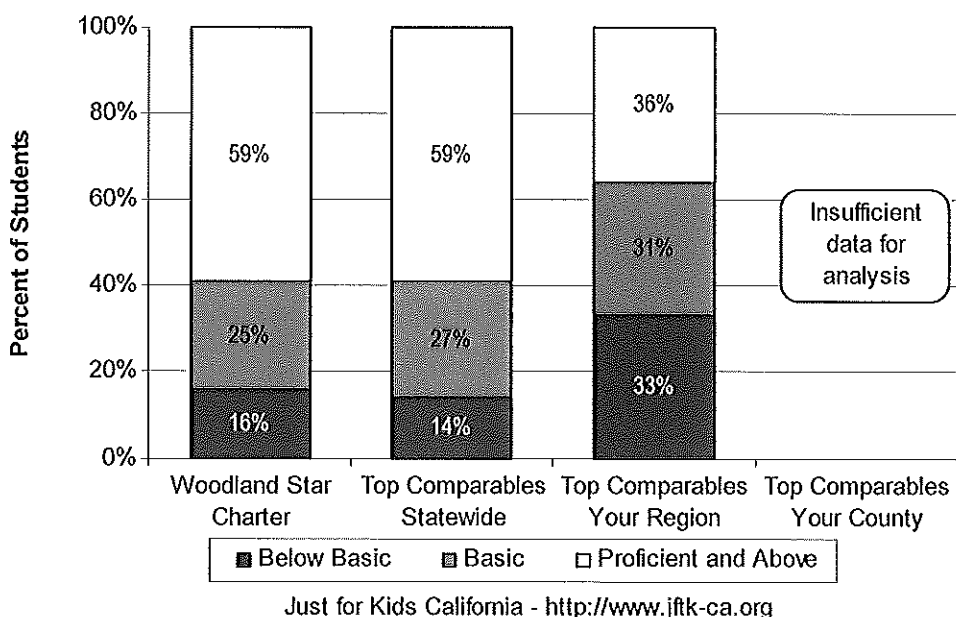


Just for Kids California - <http://www.jfk-ca.org>

c. Grade 2 General Mathematics 2006 Results



d. Grade 8 General Mathematics 2006 Results



As the 2006 CST figures above suggest, the Woodland Star Charter School data offer encouraging patterns. What did the site undertake that might have contributed to these rising achievement trends? When asked how they explained their success, administrators and faculty pointed in a host of graphic ways to the importance of rigor. In addition, they stressed relevance. But the teachers and administrators we spoke to did not stop at talk about relevance for kids. They stressed relevance for adults and the role of the artistic in building that sense of relevance. What does that look like at Woodland Star Charter?

Relevance and the arts for students

As one upper grade faculty member reflected, "Being familiar with the Waldorf curriculum means understanding how the curriculum is a progression that takes students through the grades in a way that is developmentally appropriate." When probed, this experienced teacher added, "You want to think across the whole year and your class, how to do the circle games, the time table of main lesson, the artistic work." At each grade level the lesson has to be brought in a way that is meaningful to the child then. Founding Woodland Star Charter Administrator Chip Romer concurs: "The developmental focus of our school is a critical component to its success. It is also a focus that unites the faculty."

Relevance and the arts for adults

The focus on relevance extends beyond the students to the adults. Says that same teacher, "Child study is a regular part of faculty meetings." It is not an add-on or only for special education teachers. It is relevant for all and done by all. "The whole faculty engages in fully developing their observation skills as teachers....[We] learn to be better observers...really being careful about the comments like, 'the child is that way because,'" says the sixth grade teacher. Teachers try to support each other and themselves in finding relevant data to create a picture of the child. Mechanisms such as the common child study encourage a deeper level of engagement with all students—including the strugglers—by all adults. All students are relevant to all adults, all the time. What are some of the resources to enable this level of attention?

As in the case of John Morse, so is the story for Woodland Star. Arts are not ancillary but instrumental. And they are not just for kids' learning. Learning through the arts is central for adults. Personal growth gets tied to learning to be a teacher.

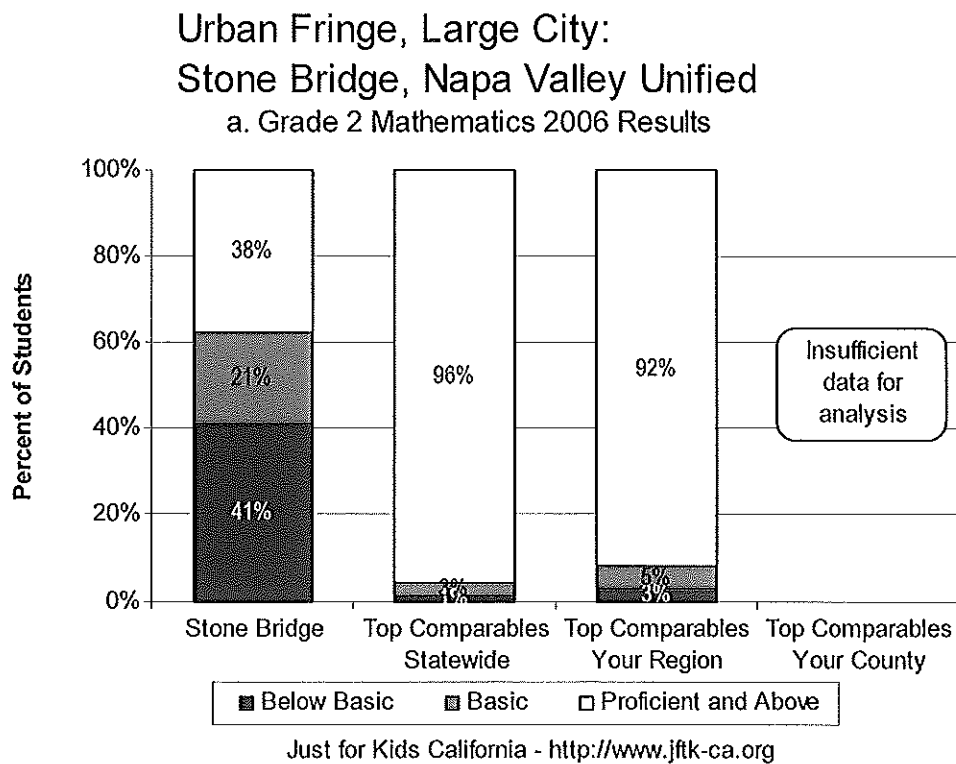
Arts are the medium

The Woodland Star Charter teacher recalls, "The artistic is a huge aspect of working with new and experienced teachers....My whole first year in training was all artistic work to really kind of give me ... what I hadn't done...." and "The artistic brings the academic to life for the child ... otherwise it's dead ... too much in the head." The artistic is not an ancillary. No, it is a key craft for any classroom teacher: "Just learning to do a chalk board drawing ... there aren't that many chalk boards out there... what is a painting lesson; how to do form drawing ... to learn how to do all these things as a class teacher... not arts or handwork but regular class teachers need to know and learn this in Waldorf."

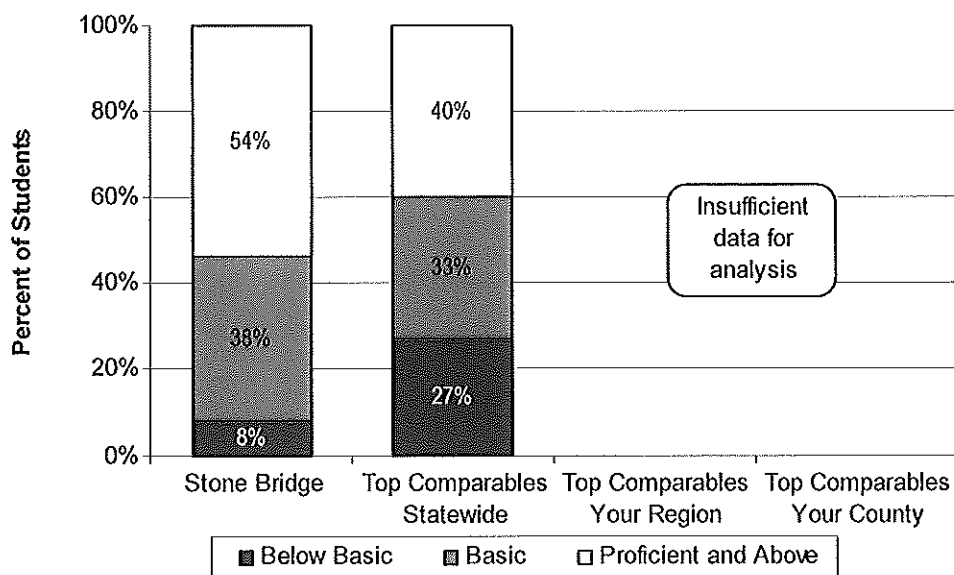
Finally this teacher excuses himself; he is working on the class play written by a veteran Waldorf teacher and focused on Caesar. He has to return to the class. "For sixth grade these Romans have real appeal," he concludes.

CASE 3: RELATIONSHIPS AND THE ARTS -- Figure 7, a-b

As in the case of John Morse and Woodland Star Charter, a first look at the data is in order.



b. Grade 8 General Mathematics 2006 Results



Just for Kids California - <http://www.jfk-ca.org>

Stone Bridge is an example of another public Waldorf site where students in grade two perform low but in eighth grade in 2006 outperformed their peers on the state's California Achievement Test, in both English and Mathematics. Though these data are not conclusive, they do invite a closer look. What is Stone Bridge doing that may support student learning, in the eye of administrators and faculty?

Stone Bridge faculty and administration affirmed the importance of rigor and relevance. In addition, in the interviews with Stone Bridge staff, the focus on relationship came to the fore. The focus was not just on relationship among students and between students and adults. The power of relationship among adults was stressed, and the power of the arts in building that, also in hard times.

Relationship and the arts for students

One teacher made the following statement:

When I got the class [in seventh grade,] five of thirteen students were at a fourth grade level in math. I spent the seventh grade year on rhythm, movement, and color to bring them up to algebra. Every main lesson [the first two hours of the day], we spent 30–45 minutes on math-related movement. On top of that, because of perspective in the history main lesson on the Renaissance math turned into art, and things began to appear. Then [after that artistic math work], the students were ready to learn.

Notes Administrator Bill Bindewald, "The regular assemblies are very important to the life of the school...just the idea that the students are part of that...gives a chance for the first graders who in the first assembly can barely contain themselves in their chairs ...the rest of the school sees them and the rest of the teachers...so their share in that progression matters....Test scores are a product of critical thinking skills and self-confidence. Having all grades perform in assembly and seeing the work they do as so important in assembly, the relevance of the artistic activities also before the faculty...is primary."

Relations and the arts for adults

At Stone Bridge the faculty meet once a week for common work and always begin with singing. What is the value of such a time investment? One teacher noted, "Artistic activities are primary. I can't sound good

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without the other. A few months ago I had an argument. It went deep, really deep. Feelings were hurt; it was a respectful argument but feelings were hurt deeply on both sides. That third day it was faculty meeting and time to sing, and you had to sing with a partner. There were only two tenors in the chorus...we were the two tenors. We went and it was hard just in the warm up, and then went to working on a difficult piece, and it was hard...but then, we were able to breathe into each other....We both noticed it was just how we each do it. She's a higher tenor; I'm a lower tenor; that's just how we do it. At the end I was able to say, 'Do you want to go back to that conversation we left off?' " Artistic activity lends support for constructive collaboration.

Appendix P:
Elements of a Traditional Waldorf School
Second Grade Assessment

Instructions

How to use the list and the manual:

This list is made up of a number of points that can be observed in the classroom (C), and some parts that need to be done individually (I), or, if this is not possible, you need to find time for it yourself (after having practiced sufficiently!). For this you will need to have a separate room where you can work undisturbed with the child.

If the class is very large, you may decide to observe first of all the children that stand out for one reason or another, then the oldest pupils, and lastly the youngest.

In each section of the manual is listed what materials are needed, how one should give instructions to the child and the different things one should observe. You may of course elaborate. After all, we are looking for a qualitative evaluation or analysis of a number of developmental conditions from which, in the end, a picture of the child may arise.

In principle the children should be able to carry out all the instructions halfway through second grade.

The most difficult and also the most important task is the interpretation of all the data.

What we offer you here can of course be extended and improved with your help.

(In the manual we always use "he" whether it is a boy or a girl).

GROSS MOTOR MOVEMENTS (C) in connection with 1

A) Throwing A Ball

Material: a large soft ball 15 cm diameter and a tennis ball.

Procedure: Stand opposite the child at a distance. The child should not look into the light. Throw the ball to him and let him throw it back. Repeat with one hand. Increase the distance.

Observation: does the ball "stick" to his fingers? Does he throw past you or not far enough, overhand or underhand? Does he follow the ball with his eyes? With one hand, what does the other hand do? With which hand does he throw? Does he retract his arms quickly?

B) Catching

Observations: Is he frightened of the ball? Can he see it coming? How does he hold his hands when catching? Can he throw or catch better? Put this in context with his relationship to his fellow men.

C) Directing And Aiming:

Material: Tennis ball, basket, blackboard, chalk, paintbrush.

Procedure: Put a circle on the blackboard (3cm diam.) with a point in it (shoulder height of the child). The child stands at the back of the classroom with his arm outstretched, paintbrush in his preferred hand, bristles facing him. Now he runs to the blackboard and without slowing down he has to try to put the point of the brush in the point in the circle with his arm remaining outstretched. On the board draw 7 points of a 7-pointed star, far enough apart that the child needs to use full arm length to draw the lines. He has to draw the lines leaving out 1, 2, or 3 points every time. Let him throw the tennis ball into the basket 10 times.

Observation: Is he accurate in his aim or does he miss often? Does he throw far enough?

D) Balance:

Material: A line on the floor 4 to 5 meters long, either of chalk or colored tape or ribbon.

Procedure: The child walks forward and backward across the bridge. No wet feet! Stand on one leg like a stork, also with eyes closed.

Observation: Does he walk freely or is he scared? When walking backwards, does he "stick"? Does he walk backwards recklessly, look behind, wobble, or hesitate? Does he stick to the line, take big steps or shuffle?

E) Walking:

Procedure: Do this on the playground or in a long corridor.

Question: How many steps do you think you need to take to get to the end?

Observation: Does he move arms and legs cross-laterally, or ipsilaterally (ipsilateral = right leg and right arm, left leg, left arm).

F) Running And Accelerating:

Procedure: Let the child run, first normally, then accelerating and going as fast as possible without stopping, to the end.

Observation: Do his arms and legs flap? Does he nearly fall over, or stumble? Can he accelerate by himself naturally?

G) Highjump:

Material: A long rope or pole.

Procedure: With one of the children hold the rope loosely, or hold the pole yourself. Let the children jump over it one by one.

Observation: How does he jump up and land? What kind of forward run does he have: fast, slow, short, long, much too high, or not high enough? Can he gauge the distance, listen to the sound of the step or jump? How high does he get?

H) Longjump:

Material: A pole or rope on the ground.

Procedure: Make the child push off at the line and jump as far as possible.

Observation: What kind of forward run does he have? How does he land? Is he scared? Does he overestimate? Can he push off exactly before the line?

I) Skipping Or Jumping Rope:

Material: A large and a small skipping rope.

Procedure: Let the children jump rope individually and also in a group while some turn the rope (end of second grade).

Observation: Does he jump on time or too slow? How does he cope with turning the rope and jumping at the same time? Watch the rhythm. Does he land heavily or lightly? Does he jump more in an upward or downward direction?

J) Hopscotch:

Observation: Which leg does he choose? Can he also do it on the other leg?

K) Frog Leap:

Procedure: The child jumps on his haunches from one place to another, individually or in a group. Repeat upright with legs together.

Observation: Does he bend his knees well? Can he balance when jumping upright? Do both legs go together, or one behind the other?

Individual

At this point you do something as a preparation for point 10 in connection with memory.

Material: A drawing of a rather absurd situation, e.g., a house with a flag and a chimney, flag and smoke going in opposite directions; and some sort of object, e.g., an oddly shaped bottle.

Procedure: Say: "I am going to show you a drawing. Look look at it really carefully for a moment. See what it is and remember well, because I am going to ask you something about it in a little while." The child also has to remember an unusual word, e.g., "paperhanging past," and a sentence made up of four words, e.g., "fat blackbirds find worms." Now give the child something to hold in his hand behind his back (he must not see it) and say: "Now feel what this is and remember it; you will have to draw it as well."

WITH TWO FEET (C)

How do they feel (warm, cold, clammy, cool)? You can check this when you practice writing with the feet in the classroom. What kind of feet (flat mobile toes, stiff toes, etc.)?

Picking Up Three Things With The Foot.

Material: A pencil, an eraser, and a marble.

Procedure: Let the child pick up the various objects with his preferred foot.

Observation: Do his hands and mouth move as well?

Writing With The Foot.

Material: A soft pencil or piece of very soft chalk, paper.

Procedure: A "helper" holds the paper while the child sits on a low chair or stool and writes, holding the pencil between his big toe and the next one.

Observation: Do his hands move as well?

HANDS

1) This can be observed easily when shaking hands with the child when he comes into the classroom in the morning. Are they warm, sweaty, clammy, or cold?

2) Say: "Squeeze my hand," and watch what the other hand does.

DOMINANCE (I) with 3.

Material: A piece of paper or cardboard on which a large loop is drawn, a worksheet to be filled in (one for each child), a watch, a rolled up piece of paper for a telescope, wooden blocks, and a low chair or stool.

Procedure: Put the cardboard against the wall. The child sits on the floor in front of it, having removed his shoes. Now give the instructions in the order that they are given on the worksheet. Show the child that you can follow the loop with your hand by drawing it in the air from left to right. Then tell the child to do the same, a) with both feet together, b) with one foot, c) with one foot and one hand, d) with one foot, hand, and eye, e) with one foot and one eye, f) with one hand, g) with one hand and one eye, and h) with one eye.

Carefully note on your worksheet whether the right or left was used, and of directions. Then say: "Pick up the telescope, look through it, and tell me what you see."

Observation: To which eye is the telescope held? Does he close the other eye? The eye that looks through the telescope is the dominant eye.

Procedure: Say: "Pick up the watch; can you hear it tick," "Stand up and put your arms out sideways. Now look at one hand," "Clap your hands 10 times" (which hand

does the work?), "Kick the wooden block with your foot through the arch," and "Step onto the stool"(which foot?). You can also observe this when the child climbs stairs.

EYE-HAND COORDINATION (I) with 4.

Procedure: Draw a circle in the air with your finger at some distance from your face (diam. 35cm) and show the child that you can follow your fingers with your eyes without moving your head. Now let the child do it himself. Then his two index fingers next to each other have to take "steps," going sideways away from each other. His eyes again have to follow without moving his head.

Observation: What are the eyes doing? Does he keep his head still?

RHYTHM AND EYE-FOOT COORDINATION (I) with 5.

Procedure: Tap a rhythm on the table (visible) and have the child copy it. Tap another rhythm under the table (audible) and have the child copy it. Tap a rhythm on the child's back (tactile) and have the child copy it. Then say, "Clap the rhythm of a song you know. You may sing it while clapping. Now do it without singing (inner sonorization)." Then have him walk the rhythm of the same song, then walk and clap at the same time, then alternately turn walk and clap, preferably in a long corridor. Then have him follow the pitch of the song by raising and lowering his hands.

BODY GEOGRAPHY (C) with 6.

Procedure: Give the instructions without demonstrating. If necessary the child can stand on a stool in front of you. Say:

- a. "Touch your right ear with your right hand."
- b. "Touch your left knee with your left hand."
- c. "Touch your left foot with your right hand."
- d. "Touch your right ankle with your left hand."
- e. "Touch your right cheek with your right hand and your left knee with your left hand."
- f. "Touch your left eyebrow with your right hand and your right elbow with your left hand."

It is best to do from d. individually, as it is difficult to observe when done with the class as a whole.

SPATIAL ORIENTATION AND ORIENTATION IN TIME (C) with 7.

Procedure: Give the instructions without demonstrating. Say:

- a. "Stand in the middle of this room."
- b. "Take two steps forward."
- c. "Point with your right hand diagonally to the right behind you."

Note: Explain this in age-appropriate words.

d. "Walk a circle, going to the left, and walk in such a way that I can't see your back." (He also has to do this with his eyes shut).

e. "Point out the third book from the right on the second highest shelf."

f. "What day is it today? Yesterday? Tomorrow? The day before yesterday? How old are you? What time of year is it?"

Observation: a-e: Is the child able to do it? How does he do it? Is he sure, unsure, not in the center, too many or too few, or left hand instead of right hand? f: Write down the answers.

FINE MOTOR MOVEMENTS (C) with 8.

Material: For e: needle and thread. For c. and d: pencil and paper

Procedure: Say a finger game rhyme and show the finger game belonging to it.

a. "Now you try it by yourself while I say the verse."

b. "Now do it with your eyes shut"

Observation: a: Can he do it? It is important that the child hears the pauses. b: Can he manage as well as with a. or does he get confused?

Procedure: c. "Write your name in the top right hand corner of the paper."

d. "Under your name write the numbers 1 to 10."

e. "Thread the needle."

Observation: c: How does the child hold the pencil? b: Does he know his numbers? Are there reversals or wrongly formed numbers (8 written as two o's one above the other)? e: Can he do it? Does he work with his whole hand or fist or does he use the tips of his fingers?

SEQUENCING (I) with 9.

Material: a. through c: a basket, beads (wooden) of different shapes sizes and colors.

Procedure: Lay out four beads in a row in front of the child and say:

a. "Can you copy this exactly " (i.e., can you make a chain like this for me? Repeat four times.)

b. "Pick up the round red one, the yellow triangular one, the blue square one and the green cylindrical one. Make a chain - 4-5 times.

c. Let the child feel three different beads behind his back (no looking!) and say: "Now lay them out in front of me in exactly the same way. Which one did you feel first? Which one next?" etc.

Each of the above sequences (a,b,c) should be laid out 4-5 times.

You can also tell a story about a child who is picking flowers for Grandma's birthday: "A red one, a yellow one, a white one, a blue one, and another red one." The child has to pick up the beads in the correct order and then in the reverse order.

Observation: How does the child manage it?

Material: Paper and pencil.

Procedure: d. Have the child draw three trees on the paper. The first tree must be the biggest and the middle tree the smallest.

e. Have him count out loud from 10 to 20.

f. Have him count backwards from 20 to 1.

g. Show him a card on which is written "TREE." Then show him a text and ask him if he can show the given word in the text. (In order to do this, the child does not have to be able to read.)

h. Does the child know the letters of the alphabet? How does he read?

MEMORY (I) with 10.

Procedure: At the beginning of the individual evaluation the child was shown a drawing. Now ask him: "What did you notice in the drawing? What was odd in the drawing? From what direction did the wind come? What was the first thing you had to do this morning?"

Observation: Write down the answers.

Procedure: At the beginning of the individual evaluation the child was asked to remember a word and a sentence. Now ask him: "What was the word I asked you to remember? What does it mean? What was the sentence you had to remember?"

Observation: Write down the answers.

Material: Paper and pencil.

Procedure: At the beginning of the individual evaluation the child had to feel the shape of an object behind his back. Now ask him: "Can you draw for me the shape of what you felt behind your back?"

Observation: Can he draw the object reasonably accurately?

****** The following takes a lot of time. Choose the areas where you suspect a problem.

HEARING OF DIFFERENCES, or auditory discrimination (I) with 11.

Procedure: Say: "I am going to say some words that have a B or a P in them. When you hear a word with a B, do this: (put your hands together), and when you hear a word with a P, do this: (clap). So: put hands together on B and clap on P." Select some easy words and some more difficult words, for example, pack, book, bulb, pussy, beak, bubble, park, splash, skip, tubby, leap, and curb.

Procedure: Say: "I am going to say some words that have a D or a T in them. When you hear a word with a D, point to me, and when you hear a word with a T, tap the table." Give examples with these sounds at the beginning, end, and middle of words, such as take, door, do, tapping, dedicate, witness, meant, rat, and rid.

Procedure: Draw on the floor in chalk a four leaf clover or a flower with four petals. In each petal write a diphthong such as ae, ou, or ea. Ask the child to stand in the center of the flower and say: "I am going to say a word. Listen carefully and jump onto the right petal."

Procedure: Draw a horizontal lemniscate on the floor. The child has to stand at the crossing and has to jump to the left or to the right to show that he can distinguish between two similar diphthongs.

Procedure: Draw two concentric circles on the floor. In the inner circle write a short vowel sound such as "eh". In the outer circle a long vowel sound like "ay". The child stands in the center. Now say: "The words that I am going to say have an "eh" or an "ay" in them. When you hear an "eh," jump into the center circle and when you hear an "ay," jump into the outer circle." Choose different examples with different vowels.

CROSSING (C) with 12

Procedure:

a. Have the child walk and draw a lemniscate. Also check when doing sums.

Observation: Note when the child avoids the crossing.

b. Let the child draw the following figure:



c. Show the child three different lemniscates, drawn side by side on the paper, including the following:



On a separate piece of paper draw the illustrated one. Ask the child where in the row he sees that figure. Make him draw it and tell him to remember it well (for question 16).

MOVING TOGETHER (I) with 13.

Procedure: Make the child draw a lemniscate in the air with his right hand. Repeat with the left hand. Make the child draw a vertical line in the air. Repeat with the left hand.

Observation: Does the unused hand move as well, or try to?

Procedure: Ask him to do both together, the vertical line with the left and the lemniscate with the right. Keep going for a while.

Observation: Do the hands begin to make symmetrical movements? Does one hand take over the movements of the other hand, or is he able to keep on making the different movements?

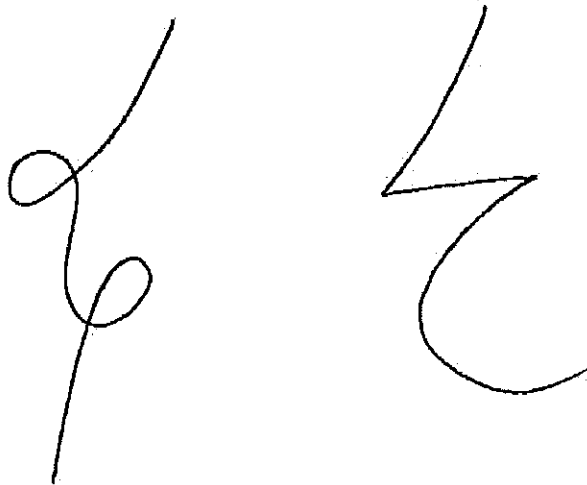
Let the child draw both of these forms simultaneously on a large piece of paper, making the movements as big as the arm will reach.

FLOWER/ROD EXERCISE (see *The Extra Lesson* by Audrey McAllen)

SYMMETRY (C) with 14.

Procedure: Over a period of time get the children to draw simple symmetry exercises on the blackboard, one child at a time. When working with the class as a whole, they can easily copy one another.

Example:



SUMS (I) with 15.

Procedure: Ask the child to work out the following sums (mental arithmetic).

$$3 + 4 =$$

$$5 + 6 =$$

$$9 - 5 =$$

$$12 - 4 =$$

$$12 = 4x$$

$$14 = 2x$$

$$8 \div 2 =$$

$$6 \div 3 =$$

Observation: Does he count on his fingers? Does he get to the answer promptly?

ASKING FOR A FORM THAT HAD TO BE REMEMBERED (I) with 16.

Procedure: Ask the child to draw the form again that he had to remember (12c).

Worksheet

Date
Name
Age
Favorite color

1. Gross Motor Movements

a. Throwing a ball

b. Catching a ball

c. Directing and aiming

d. Balance

e. Walking forwards

backwards

f. Running and accelerating

g. Highjump

h. Longjump

i. Jumping rope

Show a drawing, give a word and a sentence to be remembered, give a shape to feel behind the back.

2. Feet

Warm, clammy, cool, cold. Picking up a pencil

Hands move as well, yes/no

Hands: Warm, clammy, cool, cold.

3. Dominance

Hand _____ Foot _____ Eye _____ Ear _____

Follow the shape: With both feet together: _____ (direction)

with one foot: _____ foot?

with _____ foot and _____ hand,

with _____ foot and _____ eye,

with _____ hand,

with _____ hand and _____ eye,

with _____ eye.

Pick up the telescope: With _____ hand to _____ eye.

Pick up the watch: With _____ hand to _____ ear.

Arms to the side: Looking to the right/left hand: _____

Clap your hands 10 times (with _____ foot).

Kick the wooden block: _____ foot

Step onto the stool: _____ foot.

4. Eye-Hand Coordination.

When drawing a shape in the air, following it with the eyes

5. Rhythm and eye-foot coordination.

Tap rhythms (copy): via sight: _____

via hearing: _____

via feeling: _____

Clap the rhythm of a song: _____

Walk the rhythm of a song: _____

Walk: clap and step in turn: _____

Follow the pitch of the song: _____

Sing a song (sense of taste, sense of self movement): _____

Hearing, Self movement, Balance: _____

6. Body geography

a. Touch your right ear with your right hand: _____

b. Touch your left knee with your left hand: _____

c. Touch your left foot with your right hand: _____

d. Touch your right ankle with your left hand: _____

e. Touch your right cheek with your right hand, and your left knee with your left hand: _____

f. Touch your left eyebrow with your right hand, and your right elbow with your left hand: _____

7. Spatial Orientation and orientation in time

a. Stand in the middle of this room: _____

b. Take two steps forward: _____

c. Point with your right hand (at an angle) to the right behind you: _____

d. Walk a circle, going to the left, and walk in such a way that I can't see your back: _____

e. Point out the third book from the right on the second highest shelf: _____

f. Time: What day is it today: _____

tomorrow: _____

yesterday: _____

8. Fine motor movements

a. Finger game: Eyes open: _____

b. Finger game: Eyes closed: _____

c. Write your name in the top right hand corner of the paper: _____

d. Under your name write the numbers 1 to 10: _____

e. Thread a needle: _____

9. Sequencing, working with four different beads

a. via sight: _____ sequence _____ color _____ shape _____

b. via hearing: _____ sequence _____ color _____ shape _____

c. via feeling: _____ sequence _____ color _____ shape _____

d. connection hearing/sight: _____

e. counting forwards: _____

f. counting backwards: _____

g. recognizing one given word in a text: _____

h. can the child read already: _____

10. Memory

a. via sight: ask about the drawing? _____

what does not fit? _____

where does the wind come from? _____

what was the first thing you were asked to do? _____

b. via hearing: what was the word I asked you to remember? _____

what does it mean? _____

what was the sentence that you had to remember? _____

c. via touch: draw the shape that you felt? _____

11. Hearing of differences

a. put hands together on B, clap on P: _____

b. put hands together on D, clap on T: _____

c. jump into the correct petal on the diphthong: _____

12. Crossing

a. walking the lemniscate: _____

b. drawing the lemniscate: _____

c. Draw: three different lemniscates on paper: _____

13. Moving together

8 on the right, 1 on the left: in the air: _____

on paper: _____

14. Symmetry

a.



b.



15. Sums

$$5 + 6 = \underline{\hspace{2cm}}$$

$$4 + 3 + 6 = \underline{\hspace{2cm}}$$

$$9 - 5 = \underline{\hspace{2cm}}$$

$$12 - 4 = \underline{\hspace{2cm}}$$

$$12 = 4x; x = \underline{\hspace{2cm}}$$

$$8 \div 2 = \underline{\hspace{2cm}}$$

16 Asking for form that had to be remembered

see 1 12c.

17.

Does the child reverse his letters/numbers? _____

Does the child wet his bed? _____

Other remarks: _____

Name _____

Age _____

Grade _____

Dominance _____

Eye: _____ Foot: _____ Hand: _____ both feet: _____

one foot: _____ foot-hand: _____ foot-eye: _____ both hands: _____

one hand: _____ hand-eye: _____ one eye: _____