



**Tier 1 Proposal  
Intrinsic Schools 2**

**Submitted 05/01/2018**

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## **Domain 1: Community Engagement and Support**

*Domain 1: Community Engagement and Support assesses whether the applicant garnered authentic parent and community support and demonstrated true demand for the proposed school.*

### **Section 1.1: Community Overview**

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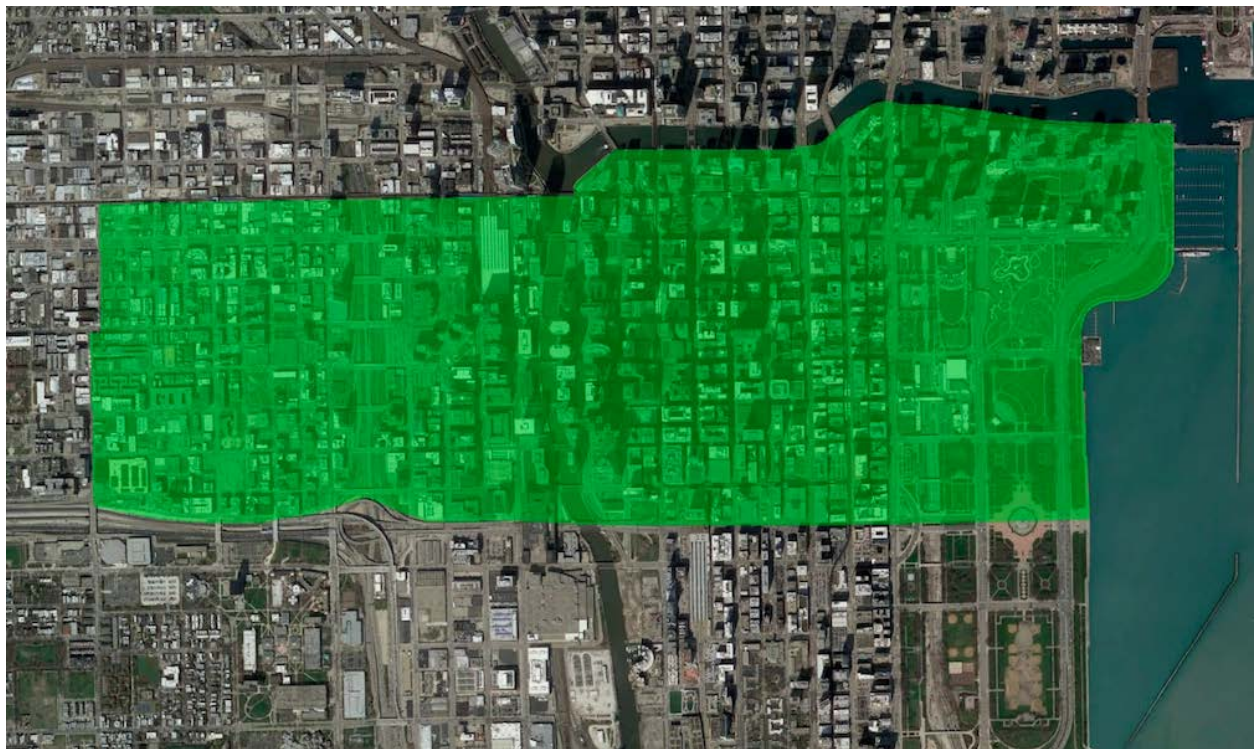
#### **1.1.1: Targeted Communit(ies)**

*Cite the possible location(s) of the proposed school. Explain the student recruitment area for the proposed school(s) and the targeted communit(ies) within it.*

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We do not have ready addresses to provide as possible locations for the proposed campus. Also, at the time of writing, we have not yet defined a specific target recruitment area but intend to recruit citywide. In addition, we will leverage our extensive waiting list of 1000-plus students for our existing school in the Hermosa neighborhood. Our targeted community for the proposed school is the Chicago Loop bounded by Congress, Upper Wacker Drive, Racine, and the lake.

We have selected the Loop in order to serve the entire city of Chicago. With the transportation options in the Loop, students across the city will have the opportunity to attend Intrinsic 2. We are also excited about this location as we believe that it will attract a diverse student body that mirrors the CPS demographics as a whole. The Loop also affords students tremendous opportunities for exposure to the arts and the business community. In addition, it provides ready access for students to engage in internships and develop mentoring relationships with a broad base of professionals.



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### **1.1.2 Community Characteristics**

*Provide a detailed summary, including references, about the neighborhood(s) within the recruitment area that includes:*

- *A historical overview containing information critical to understanding the community that the school seeks to serve (e.g., the major political, economic, educational, demographic, or community-specific trends);*
  - *Community demographics, including number of school-aged children, median or average family income, average level of educational attainment, and unemployment Rate;*
  - *Population trends, including a recent estimate of the total number of residents;*
  - *Major employers;*
  - *Local businesses and non-profits;*
  - *Community newspapers; and*
  - *Public and private schools in the area, highlighting instances of overcrowding within the schools or in the community as a whole.*
- 

Several communities are well positioned within our location boundaries, but for the purposes of this analysis we have focused on The Loop community area.

#### **The Loop**

- Historical overview
  - While many neighborhoods in the Chicago area have experienced population declines, the Loop has become one of the fastest growing communities on with unprecedented construction growth. New amenities, schools and transit options are attracting people from other areas and spurring new development. New construction as well as adaptive-use projects have created a variety of housing options that appeal to a diverse group of students, professionals, and families.
  - Tourism in The Loop has also rebounded from the recession. Many of Chicago's attractions are there, such as Millenium Park, the Joffery Ballet, and the Art Institute resulting in millions of annual visitors. This aspect of the community will help us to create unique and signature experiences for our students as well as allow for potential partnerships.
  - The Loop is Chicago's transportation hub with approximately 20% of CTA ridership occurring in this area annually. Many capital improvements have been made over the last 5 years with Loop stations as well as the construction of the Bus Rapid Transit system in 2014. Increased access to this area enables us to focus on a citywide recruitment target and will allow us to cultivate a diverse student population.
- Community demographics
  - 62% White
  - 17.4% Asian
  - 12.2% Black
  - 6% Hispanic
  - 2.2% Mixed
  - 0.2% Other
- Number of school-aged children

- There are approximately 1,060 children (ages 0 to 17), representing 6% of the total neighborhood population.
- Median or average family income
  - \$85,700
- Average level of educational attainment
  - No High School Diploma: 2.2%
  - High School Diploma: 15.0%
  - Post-Secondary Degree: 82.8%
- Unemployment rate
  - 3.7%
- Population trends
  - The Loop community is one of Chicago's fastest growing residential neighborhoods. The 2010 Census reported that the population more than doubled in 10 years.
    - 2000 : 7,056
    - 2010 : 15,710
    - 2017 : 17,600
- Major employers
  - AON Corporation
  - United Continental Holdings
  - GrubHub Inc.
  - Clayco
  - Exelon Corporation
- Local businesses
  - Florodora
  - Chicago Athletic Association
  - Absolutely Chicago Segway Tours
  - Block Thirty Seven
  - Kimpton Gray Hotel
- Non-profits
  - New Leash on Life
  - One Brick Chicago
  - Feeding America
  - Community Renewal Society
  - Chicago Coalition for the Homeless
  - Open Heart Magic
  - Chicago Area Project
  - Jobs for Youth
  - Heartland Alliance
  - Children's Home and Aid Society of Illinois
  - Ounce of Prevention Fund
  - After School Matters
  - American Cancer Society
- Community newspapers
  - Chicago Journal
  - Gazette Chicago
- Pubic and private high schools in the area
  - Noble - Muchin College Prep

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### **1.1.3 Student Population**

*Provide an overview of the anticipated/target student population that includes:*

- *Anticipated performance levels;*
  - *Anticipated demographics;*
  - *Target percentage of special education students;*
  - *Target percentage of English learners;*
  - *Target percentage of homeless students; and*
  - *Anticipated academic and social, emotional, and physical health needs.*
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Intrinsic 2 will be located in the Loop and easily accessible by public transportation. The school is intended to serve a city-wide student population and we expect to draw students from all of Chicago's neighborhoods and wards. As such we anticipate that our student population will mirror that of District 299's. According to the 2017 ISBE Report Card, we note the following demographics and key student characteristics:

#### **Ethnic Demographics**

White	10.0%
Black	37.6%
Hispanic	46.4%
Asian	3.9%
Other	2.1%

#### **Other Key Demographics**

Low Income	83.1%
Limited English Proficient	17.7%
Students with IEPs	11.0%
Homeless	4.1%

### **Anticipated Academic Performance Levels**

Based on our 5 year experience and interactions with other high schools across Chicago, we anticipate that our students will arrive at the new school with significant academic deficiencies. Our program has demonstrated our unique ability to help students catch up during their years at Intrinsic.

We anticipate students to have similar social emotional needs as those attending other CPS high schools. These needs may include issues related to temporary living situations, mental health, Title IX and DCFS cases. We structure our culture team and social work office to meet these needs.



## Section 1.2: Facilities

*Note: Per Illinois law (105 ILCS 5/27A-7(a)(3)), the applicant must identify at least two viable independent facility options unless it has fully secured an independent facility. Applicants will must update to this section in the Tier II Application. Applicants should refer to the Tier II application to familiarize themselves with the questions and submissions required in Tier II.*

### 1.2.1: Space Requirements

*Provide an overview of the space requirements needed to successfully implement the proposed school model, including a description of how the proposed site will need to evolve to support the school as it grows.*

The following table provides a detailed outline of the space requirements needed for the proposed Intrinsic 2 school. This table was prepared by our architects and is intended to allow us to construct a facility that closely resembles our current school. The Intrinsic model utilizes a unique physical environment that allows for flexibility. The proposed school will have six Humanities and STEM pods. These are adjacent to one another and share two walled off “classrooms” accessible from both sides – one equipped for science and art labs and the other for Socratic seminar. Within the pods there are spaces designed specifically for small group instruction, quiet independent work, group projects and large forums. A diagram and description of the pod can be found in response to 3.2.1 Implementation of Educational Model.

As described in the budget narrative, we intend to take the facility in three tranches to maximize cost effectiveness.

**Intrinsic Schools Detailed Space Requirements**

Room / Space	Quantity	Area (sf)
<b>Programming Requirements</b>		<b>64,817</b>
<b>Pods</b>		<b>30,000</b>
High School STEM	6	2,500
High School Humanities	6	2,500
<b>Supplemental Teaching Spaces</b>		<b>7,600</b>
Music	1	2,000
Art	1	2,000
Science Labs	1	2,500
Special Education	1	400
Learning Lab	1	400
Behavior Room	1	300
<b>General Support Spaces</b>		<b>15,007</b>
Reception		450
Office	1	300
Waiting Area	1	150
Restrooms		1,200
Men's Restrooms	1	600
Women's Restrooms	1	400
Unisex Accessible Bathroom	2	100
Locker Rooms		940



Men's Locker Room & Toilets	1	470
Women's Locker Room & Toilets	1	470
Gymnasium / Cafeteria		<b>9,650</b>
Assembly Space	1	9,000
Gym & Cafeteria Storage	1	650
Kitchen		<b>713</b>
Kitchen	1	400
Dedicated Serving Line Storage	1	250
Dry Storage	1	63
Technology		<b>293</b>
MDF	1	247
IDF	1	46
Mechanical		<b>574</b>
Supplemental Mech. Space	1	236
Fire Pump Room	1	338
Electrical		<b>542</b>
Primary Distribution	1	477
Electrical Closet	2	65
Janitor Closet	2 or 3	<b>45</b>
Storage		<b>600</b>
<b>Campus Staff Support Spaces</b>		<b>2,270</b>
Admin Suite	1	<b>1,100</b>
Principal Office	1	<b>120</b>
Assistant Principal Office	2	<b>100</b>
Social Worker Office	1	<b>100</b>
Huddle Rooms	4	<b>50</b>
Staff Workroom	1	<b>300</b>
Conference Room	1	<b>250</b>
<b>Circulation</b>		<b>9,940</b>
Atrium	1	<b>1,250</b>
Entry Vestibule	1	<b>500</b>
AORA		<b>30</b>
Stairs		<b>160</b>
Hallways		<b>8,000</b>





**Domain 2: Academic Plan**

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***Existing Chicago Operators that are applying to open another school or campus to serve grades that they do not currently serve (i.e., an operator serving grades 9-12 applying to open a campus to serve grades K-5) MUST complete this section. Existing Chicago Operators that are applying to open another school or campus to serve a grade range that they already serve, using substantially the same academic model that they already use, SHOULD NOT complete this section.***

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Not Applicable



### **Domain 3: Business Plan**

Domain 3: Business Plan assesses whether the organization has a strategic growth plan and the academic, financial, and operational capacity to successfully open, operate, and oversee the proposed new school(s).

#### **Section 3.1: Growth Plan**

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##### **3.1.1: Background Information**

Please include a one to three page overview of the educational model as background context for evaluators. The overview will not be assessed using evaluation criteria, aside from meeting the requirement for submission. It should address, but is not limited to, the following topics:

- School mission, vision, and educational philosophy;
  - Description of school culture;
  - Curriculum and instructional approach; and
  - Key, non-negotiable model features.
- 

##### **Mission and Vision**

The core purpose of Intrinsic Schools is to create a revolutionary school model that prepares all students for postsecondary success and world-changing endeavors, and provides the education community with a roadmap to sustainable implementation.

The vital outcome of our work is a blended-personalized model that can be replicated at any school anywhere. We will have failed if we are dependent on a unique blend of specialized teacher qualification and ongoing outside financial support. We will have succeeded if we are able to create additional Intrinsic campuses that offer rich learning environments to all students regardless of circumstance, parental education level, English proficiency, and prior learning difficulties. We will also be successful if we are able to actively share our model, key lessons learned, best practices, etc., with the education community on a rolling basis as we grow. We are committed to collaborating with both district and charter schools and we have strong relationships at the principal-level in both. We will share all tools, curriculum and processes developed as part of our model with others at no cost.

To achieve our mission we will combine proven instructional practices, next-generation technologies, a unique classroom design, and innovative management systems to create optimal learning experiences and organizational efficiency. In order to validate that the model can be replicated we need to establish multiple proof points. Most immediately, our second Intrinsic charter school in Chicago will allow us to further test and develop our model, and begin to demonstrate that our results can be achieved across multiple school environments. Before graduating from Intrinsic, our students will be:

- **Autonomous & Persevering Learners:** Independence and self-advocacy are skills that are critical for the 21<sup>st</sup> century and must be explicitly taught, modeled and measured. Intrinsic students will become increasingly responsible for their own learning as they demonstrate independence.
- **Effective Communicators & Influencers:** Written and oral communication skills will be emphasized across all content areas. Students will be expected to continuously think about how to solve existing problems, improve upon their ideas and apply their knowledge to new situations. Students will be expected to create evidence-based arguments, and will be assessed by common rubrics.



- *Critical Thinkers & Problem Solvers*: Students will be led to explore issues and academic questions in deeply rigorous ways that promote higher cognitive demand and cause them to ask further questions in which they are analyzing, evaluating, and creating new knowledge.
- *Collaborative Teammates*: Because learning is social, student experiences will be designed for peer-to-peer interaction in both face-to-face and online settings.

### **Educational Philosophy**

In order to prepare students from high-need communities for postsecondary success and guide them toward the passions that intrinsically motivate them to positively impact the world, we have to challenge traditional notions of high school education. Data show that our students span large ranges—in aptitude, levels of background knowledge, and personal experience—and this is where today’s factory-model education system breaks down. Just because two children are the same age does not mean they learn at the same pace or should follow the same pathway. Each child has different learning needs at different times, and each student can and must be personally invested in their learning. At Intrinsic this personalization and independence is achieved via a holistic blending of technology to empower team-teaching in flexible, data-driven classrooms. Our educational philosophy is driven by five main beliefs about how students learn:

1. Education is a continuous process that addresses and meets students’ intellectual, emotional, physical, and social needs.
2. Learning is a social process where students benefit from a mix of instruction where some is tailored to a student’s instructional level, and some is learned collaboratively with peers at a common, rigorous level.
3. Learning Experiences at school should be framed around larger essential questions that are relevant to students’ lives and interests.
4. If students are taught to set and monitor goals, they will gain awareness and control over their own learning and become more motivated to achieve.
5. Technology can improve the educational experience for students if paired with great teaching.

### **School Culture**

At the foundation of every great school is a strong, coherent culture based on mutual respect between students and adults. At Intrinsic, we envision a culture that inspires all students to strive for high levels of academic success and to pursue their interests in depth. We believe that a balanced focus on achievement and the pursuit of passions will promote a positive academic environment. We embrace a warm and strict culture that allows students to learn and teachers to teach. Accordingly, we view it as our responsibility to implement a culture of discipline, respect, and hard work every minute of every day, to ensure student safety and maximize time on task.

*Core Values:* Our core values were constructed with students at our first campus and will remain consistent across all schools. Students at Intrinsic Schools are guided by the desire to be EPIC, an acronym for Empathy, Perseverance, Independence and Curiosity.

CORE VALUES
<b>Empathy</b> — For many students, school is the only place where they engage with a diverse set of people. We strongly believe in creating a school environment where students support one another, respect differences and are compassionate.
<b>Perseverance</b> — According to Carol Dweck, a prominent researcher on human motivation, challenge-seeking and resilience are key factors to success. She notes that people with a growth mindset (one that views intelligence as something that can be attained rather than something that is genetic) “see a challenge as something that helps you learn and a setback as something that ultimately helps develop your ability. For this reason, people with a growth mindset often accomplish more in the long term.” <sup>1</sup>
<b>Independence</b> — To be successful in four-year universities, students need to manage their time, set goals and objectives, and advocate for themselves. Thus, Intrinsic will thoughtfully and gradually help students become autonomous learners.
<b>Curiosity</b> — We believe that college persistence is linked to whether or not students view college as a path to a specific goal. For this reason, we want to encourage students to pursue their passions. Intellectual curiosity is the source of such passion.

These core values are interwoven into all aspects of the school including systems, traditions and policies. EPIC is at the center of a continuous process where students think, solve, communicate, reflect, and repeat.

### Curriculum and Instructional Approach

Content used for our school's blended learning program comes from a mix of commercial vendors, open sources, and in-house development. When selecting a vendor for content, we look to successful schools that have implemented similar programs, review demo accounts with test data, and run small pilots. Our team has utilized various research-based curricular materials and technologies that, when implemented with fidelity, yield positive outcomes for students of diverse backgrounds. We use a hybrid of paper-based and technology-based programs to develop our core curriculum.

### The Intrinsic Blended-Personalized Learning Model

The Intrinsic Blended-Personalized Learning Model will ensure 21<sup>st</sup> century post-secondary success for all our students. We believe solid instructional practices can be both enabled and enhanced with technology. We built our model by starting with the student characteristics we believe are critical for success, and then by layering in technology to enhance the student experience needed to develop these characteristics.

We believe in two main tenets for the use of technology:

#### 1. Technology for Differentiation:

After years of work to get better data in the hands of teachers, we learned that providing teachers with specific data on the learning profile of each student is only the first step toward differentiation. In most cases, the data reveals that a class of 30 students requires at least ten or more different plans in order to match student readiness for concepts being taught. While it's impossible for a teacher to create ten different lesson plans, technology can adapt for all 30 students so that at any given time each student can be working around a similar concept but on different activities based on individual learning needs.

<sup>1</sup> "Carol Dweck on Success." <http://thebrowser.com/interviews/carol-dweck-on-success>

## **2. Technology to Achieve Small Group Instruction:**

Personalization can be best achieved in small groups where teachers provide targeted instruction to meet each student's needs. Our large pod spaces are typically staffed with three teachers serving 60-65 students. Math and English students typically spend 50% of their time working on independent activities overseen by one teacher. Activities could include: writing or revising a paper, practicing problems, watching a video and taking guided notes, or reading independently. While half the class works independently, the other half is split into two groups of fifteen students or fewer to receive direct instruction from the other two teachers. These small groups allow teachers to spend more time with each student and hold students more accountable for participation in group discussion and activities.

Technology is integrated into all learning at Intrinsic Schools. Each student is given a Chromebook that is his/her device to use during the day and take home at night so that learning can be enriched by technology both during and outside of school.

Within the tenets of differentiation and small group instruction, co-teaching teams are empowered to define the model for their individual classes. Teams own the design of their courses and are responsible for determining the appropriate mix of online and offline instruction. This mix could include: purchased or free online instructional tools, technology-enabled, teacher-created resources; or offline tools such as teacher created "packets," physical manipulatives and paperback novels. This integrated approach is reflected in a lesson plan that describes both the online and offline activities.

The mix of approaches is critical to ensuring that students have experienced a wide variety of instructional strategies to prepare them for post-secondary success. For example: while online math programs can provide excellent sources of high quality, Common Core aligned problems and both video and remote tutoring support, we find that students should complete the problems on paper to show their work and then input the answers online. When teachers collect the "scratch" work, students typically perform better and the teachers have formative data ("the work") to assess misconceptions. The same is true for paper novels; we have found that while some online tools allow for annotation, students are more likely to annotate texts when they can write in a physical book.

### **Key Model Non-Negotiables**

To ensure that our model is continuously improving and is meeting our mission and vision, we have developed the following design anchors which form the basis of our non-negotiables:

**Increased Access:** Do practices increase postsecondary access?

**Personalized Pathways:** Are pathways co-designed with students and families considering student strengths, interests, data, goals and potential?

**Strong Identity and Community:** Do practices include student reflection on themselves and their sense of belonging in partnership with their community?

**Agency:** Are students empowered and prepared to carry out their plans and overcome real or perceived setbacks as they arise?

Our non-negotiables center upon:

- Data driven, rigorous instruction



- Specialized learning environments and facility designs to promote our unique approach to personalized learning
- The Intrinsic technology platform
- Flexible groupings
- Strategic use of technology
- Collaborative team teaching

We anchor our practices on seeing our students to and through rigorous universities and strong postsecondary programs. In reimagining the school experience, we marry established instructional practices with educational technology to meet students where they are and accelerate each student's individual growth. We believe success in the 21<sup>st</sup> century workplace requires students to have not only academic content and technical skills for a particular career, as well as demonstrated sustained growth.

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*Indicate whether the proposed new school(s) will adopt the same policies and practices as existing schools in the network related to the topics below. If the proposed new school model will differ from existing schools, highlight the key distinctions in the areas below. If specific policies or practices still need to be developed for the new school(s), include a timeline with clear tasks, owners, and deliverables for that topic. (Responses should be no more than one to three paragraphs per topic. If the new school will follow the same practice or policy, simply state that there will be no change.)*

- *Calendar and schedule;*
- *School culture;*
- *Discipline policy;*
- *Promotion and graduation policy; and*
- *Programs to address the needs of:*
  - *At-risk students;*
  - *Students who require remediation;*
  - *Diverse learners;*
  - *English learners;*
  - *Gifted and advanced students;*
  - *Professional development;*
  - *Instructional leadership roles;*
  - *Teacher and school leader evaluation policies;*
  - *Hiring processes (including qualifications and responsibilities for instructional and administrative staff);*
  - *Personnel policies;*
  - *Food services; and*
  - *Financial controls.*

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The proposed school will adopt all of the same policies and practices as the existing school.

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**3.1.2: Proposed Growth**

*Describe the organization's proposed scope of growth in any locations outside of Chicago. List any other proposals that are pending with other authorizers or have recently been approved. Cite the number of school(s) requested in each proposal.*

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Intrinsic Schools is not applying to open any locations outside of Chicago. Intrinsic Schools does not have any applications pending with other authorizers.

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*What is the rationale for the proposed growth strategy in Chicago and elsewhere (if applicable)? In addition to having the opportunity to reach and educate more students, what does the organization hope to gain by adding new school(s)? Describe the organization's strategic vision and desired impact of its growth plan.*

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Intrinsic Schools' strategic vision for growth is centered on our mission: to create a revolutionary school model that prepares all students for postsecondary success and world-changing endeavors and provides the education community with a roadmap to sustainable implementation. First and foremost, we believe that an additional Intrinsic school would have a significant impact on Chicago's high school students by providing 1,000 more children with the opportunity to obtain a high quality, rigorous and empowering high school experience as demonstrated by our outstanding SQRP history. In our first year of operations, we received the second highest SQRP rating of 1. In all subsequent years, we received the highest possible SQRP rating of 1+.

Since our founding, the growth plan has been based not on rapid replication for the sake of the network, but strategic replication in order to prove the model. We believe that a second Intrinsic campus will demonstrate the success of the Intrinsic academic model within a practical, sustainable financial framework.

At the core of our mission is a commitment to documenting and sharing the results of our process — key successes and failures, new norms and conventions, and hanging questions — in order to provide the education community with a roadmap to the sustainable implementation of the Intrinsic model of personalized learning. Over the last five years, we have carefully documented the evolution of our academic and organizational practices and are now ready to roll them out to an additional Intrinsic school.

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*How did the organization determine the proposed pace and scope of growth? What academic, financial, and organizational metrics does the board consider when assessing the organization's capacity to grow? Explain any "green lighting" procedures and discuss how the network currently performs against key benchmarks for expansion.*

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When Intrinsic Schools first opened in August 2013, our plan had been to open five schools over five years. Since that time we have slowed our planned pace of growth. Over the last five years, we have worked to build the necessary key systems, structures and practices required to successfully launch and operate a new high school in Chicago's loop. While the Intrinsic model will continue to evolve and





iterate, we have institutionalized core components of our model and have demonstrated success. We now firmly believe that we are prepared to open an additional school.

Our board and organizational leadership are intentional about our pace of growth and would not take on an expansion that would put the first school or organization as a whole at-risk. To this end, senior leadership discuss our potential growth at each board meeting and, in collaboration with the Board, assess on an ongoing basis whether or not we believe that Intrinsic is positioned to replicate successfully. The senior leadership and board of directors consider the following five areas in making a decision whether or not to green-light replication:

- **Academic Excellence:** Prior to replication, Intrinsic Schools must demonstrate that students are achieving academic excellence. The Board and leadership will only green-light replication if existing Intrinsic Schools are obtaining a 1 or 1+ on the CPS SQRP rating.
- **Financial Sustainability:** Prior to expansion, Intrinsic Schools must demonstrate that a minimum of 40% of the philanthropy needed to fund a school launch has been secured. Additionally, the organization as a whole must maintain a minimum of 45 days cash on hand.
- **Enrollment Demand:** Prior to replication, Intrinsic Schools must demonstrate sufficient enrollment demand to support a new school. To this end, existing Intrinsic schools need to have a minimum of two applicants per each open high school seat in the year prior to launching a new campus.
- **Availability of a Suitable Facility:** Intrinsic Schools will not replicate until a permanent facility has been identified and secured which accommodates our unique use of space and is financially viable. In order to ensure sufficient time for student and staff recruitment, a permanent facility must be identified a minimum of six to twelve months prior to the new school launch.
- **Identification of a School Leader:** Over the past three years, we have learned that potential Intrinsic school leaders must have a minimum of six months of Intrinsic leadership experience (preferably more) prior to becoming the principal of an Intrinsic school. Intrinsic's approach to instruction is unique and we believe that any Intrinsic school leader must intimately understand how our model functions. We intend that all future Intrinsic Schools leaders will have spent at least six months on staff at Intrinsic with successful outcomes and evidence of strong management skills.

At this time, Intrinsic meets all of the greenlighting criteria with the exception of having identified permanent facilities. We are actively evaluating facility options for our next school including: Greenfield sites, existing facilities to renovate, and lease opportunities.

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### **3.1.3: Implementation of Growth Plans**

*As the network continues to grow, how will the organization ensure that it continues to provide the same quality of services? How will the model or operations change as the proposed number of students and school(s) are added (if applicable)?*

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Intrinsic Schools intends to use a tight organizational model with limited variability from campus to campus. This approach will help to ensure that the "quality of services" are consistent from one Intrinsic school to another. We are currently in the process of designing and documenting systems, tools, practices, and policies to facilitate the desired consistency from an academic, cultural, financial and



operational standpoint. As we are developing these systems and tools, we are building them to easily scale.

One of the key drivers of a successful a new school launch is having the correct people in place. As discussed above, we intend to promote principals from within. Melissa Zaikos, Intrinsic’s CEO and Founder, who has also been serving as principal for the first Intrinsic School, and has a deep understanding of the requirements for this position, will manage the leadership training. Additionally, Zaikos has a long track record of developing educational leaders. While working as a Network Chief at CPS, six of her direct reports were promoted to Chief of Schools positions. In addition, Zaikos has served as evaluator for the CPS principal eligibility process and has worked with Local School Councils throughout Chicago to hire over 50 Principals.

Prior to the launch of the second school, Zaikos will become full-time CEO and will oversee the performance of all Intrinsic schools. In this capacity, Zaikos will work closely with the school principals to ensure that the Intrinsic model is delivered with fidelity. She will also oversee the refinement of the academic model and the training of future principals.

Through an intentional leadership training program, future Intrinsic principals will take on increasing levels of responsibility and engage directly in all aspects of a principal’s responsibilities including instructional oversight and planning, selecting and supervising teachers, managing the school culture, engaging with families and the community-at-large, and school operations. The leadership training will be instrumental in our efforts to maintain consistency across schools and ensure that the same level of service is provided at each campus.

We do not anticipate significant changes to the school model as we expand. The new school will serve as a laboratory of innovation where leaders and educators are encouraged to pilot new approaches, curricula, digital content, etc.

The operational model is functioning in much the same manner as it will after Intrinsic Schools replicates. The network operations team provides back office support in all non-academic areas including: finance, facilities, community engagement, compliance oversight, technology infrastructure, fundraising, student recruitment, staff recruitment and human resources. We have already put systems, policies, and procedures in place that are easily scaled as we continued to grow. It is important to note that although Intrinsic is currently operating one school, enrollment is approximately 1,000 students. Many Chicago charter schools enroll between 350 and 600 students at full capacity; since we are about twice as large, we are currently working with a more complicated organization. To support these functions, Intrinsic’s network office will grow over the next several years.

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*Discuss the risks associated with implementing the proposed growth plan (e.g. identifying facilities, fundraising, identifying high-quality school leaders and teachers, meeting enrollment targets, sustaining high levels of academic performance)? What contingency plans have been developed to help mitigate these risks?*

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The Intrinsic Board of Directors and senior leadership have extensive first-hand experience with the challenges faced by rapidly expanding organizations. At both the Board and staff leadership levels, we



have proactively implemented a series of measures to ensure that we are identifying and mitigating the challenges that arise. We have categorized our potential risks and mitigating strategies as follows.

## **Operating Risks**

### Facilities

Identifying a suitable and affordable school building has proven to be the most significant impediment to Intrinsic's replication. We have, and will continue to explore a wide range of facility options including long-term leases, acquisition of a Greenfield land and construction of a new facility, and acquisition and renovation of an existing structure. However, given the current political climate and the financial realities of a Chicago charter school, we have had a difficult time identifying facilities to meet our needs. As discussed above, Intrinsic is committed to identifying a permanent facility prior to launching a new school. While we are open to the idea of incubating a new school in a temporary location, we will only do so if we are certain that the students will have a school building to accommodate the school's projected enrollment at full capacity. This approach creates the risk that we may need to defer the start date of the proposed schools should we need additional time to secure a facility.

To mitigate this risk, we have assembled a very strong team to support us in our search for future school buildings.

- **ProTen Reality Group**, a leading Chicago commercial real estate firm is assisting us with the identification and acquisition or lease of a school facility.
- **Wheeler Kearns Architects**, the award winning architecture firm that designed our first school building is assisting us in determining how different potential sites and spaces could accommodate our unique program.

In addition, two senior network office staff members and the Chairman of the Board are leading the facility search efforts for Intrinsic.

### Fundraising

Every Intrinsic school will operate solely on recurring public revenue at full capacity however, the launch and expansion the proposed school will require philanthropic support for the first four years of existence. To date, we have been highly successful, raising in excess of \$7 million. To execute the plan as detailed in this proposal, Intrinsic will need to raise an additional \$2.3 million over the next five years. While we are confident in the strength of our board of directors and network leadership staff as it relates to fundraising, there is a risk that we will not be able to raise the necessary funds to fully implement our growth plan in the timeline articulated here.

We have several mechanisms for mitigating this risk. First and foremost, as discussed above, we will not green-light a new school project until we have secured gifts and pledges to cover at least 40% of the philanthropy necessary for launching a new Intrinsic school. In the event that we are unable to meet the green-lighting criteria, we would either delay a school's launch or identify areas of potential savings to reduce the philanthropic need.

### Enrollment Demand

Charter schools that fail to consider the importance of student recruitment efforts to foster enrollment demand often find themselves under enrolled which can lead to significant financial challenges.



We take this risk very seriously and have put in place a number of methods for ensuring that we have strong interest from students and families and not only meet our enrollment targets but develop substantial wait lists each year. We will work closely with aldermen and community groups to ensure that families are aware of the unique Intrinsic educational program, our academic successes as well as our focus on developing the whole child for both secondary and post-secondary success. Additionally, we believe that all Intrinsic Schools should have the ability to draw students from across Chicago.

Our recruitment plan for the proposed school will follow the practices we use for our existing school, which are broken out into three stages:

- APPLICATION: Go CPS (September-December)
  - Reach out to K-8 area elementary schools and establish relationships with the principals, teachers and counselors
    - Host information sessions for counselors
    - Request their assistance in setting up presentations to 8<sup>th</sup> grade students and parents
    - Hold informational meetings for students and parents
    - Host monthly tours, open to the general public
    - Offer shadow days to interested students
  - Attend high school fairs and student recruitment events
  - Work with businesses, associations and community leaders to introduce ourselves directly to prospective parents
  - Hold open houses for 8<sup>th</sup> grade students and their families
  - Produce informational videos and share on our website, across social media, and via available partner and pay media streams
  - Targeted advertising (website/newspaper ads, billboards, social media, community publications, snail mail, neighborhood flyers.)
  - Work with current Intrinsic families to notify and educate potential families
  - Maintain targeted lists of potential families — regardless of grade level — compiled via interest forms, open houses, and retail efforts, and keep them notified on our enrollment cycles
- CONFIRMATION (March-June)
  - Lottery
  - Manage Waitlist
  - Enrollment Day
- FOUNDATION (June-August)
  - Welcome BBQ
  - Orientation Day
  - Mustang Week

### **Human Capital Risks**

One of the most challenging aspects of launching a new school is the identification, hiring and training of a new school leader. The wrong hire has the potential for derailing an otherwise strong replication effort. As such, we are very intentional and methodical in the selection and training of new Intrinsic school principals.



As mentioned above, Melissa Zaikos has a successful track record in identifying, training and promoting staff while working as a network chief for CPS and she brings these skills and experiences to Intrinsic Schools. To date, we have identified three potential school leaders who are currently training to assume principal positions both at newly launched schools and to take over the role of principal in the existing Intrinsic School which will allow Melissa to shift to being a full-time CEO.

Identifying and hiring high quality teachers is also a critical component to launching a successful school and represents an area of risk for all new schools. While we recognize the challenges of a competitive teacher job market, we are confident about our ability to attract, hire and retain strong teachers. Section 3.3.4 Human Capital describes Intrinsic's capacity, timeline and process for hiring school staff.

### Academic Risks

We recognize that many emerging charter school networks have expanded at the expense of the academic success of the existing schools. At Intrinsic we do not view this as an acceptable outcome. In order to mitigate this risk, we operate a highly data driven school and monitor outcomes in real time. Student assessment and response to data drives the Intrinsic Schools model. Our school-level strategic plan outlines school-wide, cohort, and individual student academic benchmarks in the following ways:

- School-wide: We track school-wide grade point averages and analyze course grade distributions.
- Cohorts: We track performance (absolute scores) on interims, the PSAT 8/9, PSAT 10, PSAT/NMSQT, and the SAT.
- Individual Students: We track progress (within the year and year to year) on interims, online programs, and the NWEA MAP.

Below is an overview of the assessments to be used at each Intrinsic School:

Assessment Purpose	Tool	Grade	Source	Frequency
Diagnostic	NWEA MAP <sup>2</sup>	9	Purchased	2x per year <i>September</i> <i>May</i>
	Content Assessments	All	Teacher created	Weekly
	ACCESS	All	State	Annually <i>February</i>
	PSAT 8/9 <sup>3</sup>	9	College Board	Annually <i>October</i> (BOY)
	PSAT 10 <sup>4</sup>	10	College Board	Annually <i>October</i> (BOY)
	PSAT/NMSQT <sup>5</sup>	10-11	College Board	Annually <i>October</i> (BOY)
	Practice SAT	11	Retired exams	2x per year <i>September</i> (BOY) <i>December</i> (MOY)

<sup>2</sup> The NWEA MAP will be given to all 9<sup>th</sup> grade students as an initial point for flexible grouping and Lexile Levels.

<sup>3</sup> The SAT Suite of Assessments are reviewed across subject areas and by skill based on item analysis.

<sup>4</sup> The PSAT 8/9 and PSAT/NMSQT

<sup>5</sup> The PSAT/NMSQT will be given to all 11<sup>th</sup> grade students and select 10<sup>th</sup> grade students.

Assessment Purpose	Tool	Grade	Source	Frequency
<b>Check for understanding or mastery of grade-level skills and content</b>	Entrance/Exit tickets	All	Teacher created	2x week
	Interims <sup>6</sup>	9-10	Interims	2x per year <i>September</i> <i>January</i>
	Writing Assessment	All	Intrinsic Writing rubrics	3x per year <i>September</i> <i>December</i> <i>February</i>
	End of lesson reflection	All	Teacher created	Daily
<b>Summative</b>	Course Final Exam/Capstone Projects	All	Teacher created – common across Intrinsic Schools	Annually <i>June</i>
	PSAT 8/9	9	CPS/College Board	Annually
	PSAT 10	10	CPS/College Board	Annually
	SAT	11	State	Annually <i>March</i>
	AP Exams	10-12	AP	Annually <i>May</i>
<b>Student Agency</b>	MESH Survey <sup>7</sup>	9-12	Purchased	2x per year <i>September</i> <i>May</i>
	5Essentials	9-12	CPS	Annually <i>March/April</i>
	Rubrics to measure Intrinsic's graduate aims	9-12	Intrinsic Developed	2x per year <i>September</i> <i>May</i>

The CEO and school principals on an ongoing basis will analyze each of the data points created through the multiple types of assessments. Additionally, we will track other key pieces of data such as:

- Culture data such as merits, demerits, detentions, suspensions, etc.
- Student transfer rates
- Staff turnover rates

<sup>6</sup> We will using released tests from the SAT Suite of Assessments for our interims.

<sup>7</sup> As part of our commitment to expanding the definition of student success, we administer the MESH (Mindsets, Essential Skills, and Habits) and Culture/Climate surveys via a partnership with the NewSchools Venture Fund and Transforming Education. The student MESH surveys will measure students' self-report on seven competencies: Self-Awareness, Self-Efficacy, Growth Mindset, Self-Regulation, Perseverance, Curiosity, and Social Awareness/Social Competence. The Culture/Climate surveys will measure students' perceptions of seven components: Cultural and linguistic competence, engagement, learning strategies, rigorous expectations, school safety, sense of belonging, and teacher-student relationships.



Because Intrinsic is a small network, the CEO is able to be very involved and work closely with each school leader. The CEO and school leader will have weekly 1:1 meetings where the school leader can seek support from the CEO and the CEO will provide on-going performance feedback and coaching. The CEO will conduct teacher observations alongside the principal, will observe the leader in various settings including observation and feedback, data meetings, staff development and community situations — often videotaping — in order to support the leader’s ongoing development.

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### **3.1.4: Continuous Improvement**

*What are the areas in which the network is currently focusing its improvement efforts? What specific challenges is the network experiencing in these areas (special needs students, internal/interim assessment, calendar and schedules, school culture, discipline, parent and community engagement, staff observation and support, etc.)?*

- *Explain how these priority areas were determined.*
  - *Briefly share the activities and initiatives that the school/network is undertaking to improve these components of the school model.*
  - *Describe who is leading the effort and why.*
  - *Describe the results to date.*
  - *How might the addition of new school(s) impact these existing challenges?*
- 

Intrinsic is guided in large measure by the drive to continuously iterate and improve upon our new and unique educational model. When visitors of our Belmont Campus ask how we see ourselves, we often say, “We are a good fifth-year school,” meaning we are proud of our progress but understand that creating a great school and a groundbreaking school model is a multi-phase process.

As we began our fifth year, we engaged over 100 stakeholders in a reflection on our model. We held six student focus groups, intentionally seeking out multiple diverse groups of students. We held parent focus groups during the day and at night led in both English and Spanish. We also interviewed 38 staff members and 18 individual students across the school. The purpose of this reflection was to identify strengths and determine areas for improvement. Through this process, we identified a few key areas in which to invest deeply, effectively prioritizing our development so that we build our model sequentially, with support, rather than constructing it on many fronts simultaneously.

We are currently targeting and refining three goals:

- Creating systems to increase student agency and choice
- Applying a diversity, equity and inclusion lens to everything we do
- Providing additional supports for our diverse learners and teachers of diverse learners.

Within each area, the improvement process includes design thinking sessions with students, parents and staff, incorporates working groups owned by a staff member and championed by a member of the administrative team, and full-staff communication and feedback cycles.

### **Student Agency**

Now that the school culture and organizational structure have been firmly established, we are prepared to refocus on our goal to create independent-minded students. We define student agency at Intrinsic as engaging students in setting their own goals and plans, thereby guiding students to articulate their





interests and collaborate with each other to achieve goals. We are looking to increase student agency in several ways including a new Wednesday structure, increased dual enrollment options and increased support for internships.

Currently Wednesdays are shortened for students in order to provide time for staff development. We currently operate an alternating A/B schedule. We are planning to move to a fixed A/B schedule where core classes meet on Monday and Thursday or Tuesday and Friday, thus allowing a new structure for Wednesdays.

Our new Wednesday structure will include an academic intervention block where students can choose to attend a study hall, teacher-led office hours or work with other students in study groups to catch up on work, prepare for projects or exams or seek extra support for concepts that are challenging to them. The purpose of this academic time is to support students toward their learning goals but also to allow students to make choices about what structure will best propel them forward. We believe students' ability to assess their learning needs and make choices about how to spend their time will increase their success in college or other postsecondary environments.

The second block of time will include student clubs and activities. We think it is important to provide this during the day because so many of our students have responsibilities outside of school that limit their ability to stay on campus after school. By providing all students with access to clubs and activities during the day, we can promote student leadership critical for postsecondary access and success.

Additionally, we have had significant success with our dual enrollment program for the past two years. This year, roughly one third of students earned college credit while in high school. We are working with the City Colleges of Chicago to expand this program, which will enable 11<sup>th</sup> and 12<sup>th</sup> grade students to practice taking courses on a college campus and access electives that are not able to offer. We provide a dual enrollment coordinator to check in with students on their progress but also require students to take increased ownership over their academic success in these classes.

Finally, we want students to employ agency over their schedule senior year. We have adjusted our schedule to enable students to complete all graduation requirements while participating in internship programs through Genesys Works and Urban Alliance. We want students to decide if they prefer to remain on campus all day or get real-world work experience before embarking on their postsecondary paths.

Our proposed school will incorporate the new Wednesday schedule and a commitment to both dual enrollment and internship options for students. Wednesdays will be championed by the principal. Our Director of Postsecondary champions dual enrollment and internship opportunities.

### **Diversity, Equity and Inclusion (DEI)**

Our student population at Intrinsic is currently comprised of over 95% students of color. In order to best partner with our students and families, we know that an explicit focus on diversity, equity and inclusion is critical. Thus, we are in our second year of an on-going DEI focus that is not an initiative but a part of who we are as an organization that will continue indefinitely. The vision for DEI at Intrinsic is to use diversity, equity and inclusion as a lens to build new and reflect on existing school systems, procedures, and policies and to build a diverse environment where students, staff, parents, and community can bring their whole selves to our community.



Our DEI work is led by a committee of teachers and staff members and is chaired by our organization's founder, Melissa Zaikos. We have created three specific workstreams below but DEI thinking should permeate everything we do.

One component of our DEI work is staff professional development and circles. Staff members self-identify into affinity groups that discuss issues of race, white privilege and power structures that influence us as educators. We also come together in monthly staff circles. Circles are led by Intrinsic circle keepers that received six full days of training on the circle keeping process. Circles allow us to process events at school and in the world together in a productive and supportive environment.

As stated above, a strong coherent culture is core to our school. This culture must be one of mutual respect between student and staff, staff and families and students and students. Thus, the lens of DEI is critical for all policies and procedures related to student culture. We have clear rules and consequences that result in a safe environment that is highly valued by our students, families and staff. During our reflection period earlier this year, we asked each group for feedback on our current system and received very positive feedback. As expected, students had minor requests for changes to the rules but were overwhelmingly very supportive of our systems. Even with this strong support, we believe that it is important to monitor culture competency, power dynamics and the connection between consequences and student learning. For these reasons, we are focusing on peer to peer mentoring, restructuring detention and advisory circles.

We are in our second year of peer to peer mentoring. 11th and 12th grade students are paired with younger students that need support in the areas of organization, executive functioning or behavior. Many of our mentors are students who initially struggled in high school but have since made great gains. Students meet weekly before school and mentors monitor student grades, attendance and behavioral data. After school field trips and events are planned quarterly for mentors and students. Mentors are trained to do this and supported by our social worker. Due to the success of the program, we intend to grow it significantly at the Belmont campus and include it at the onset of our proposed campus.

Detention is our consequence for students that earn more than four demerits in a cycle. During our feedback sessions with students, they requested that we increase vehicles for reflection within detention. Thus, we created a working group of students, parents and teachers to redesign detention. They came up with a pilot plan that includes community service, mindfulness training and circles. This pilot has been very successful as students have reported that detention is helping them. The new structure requires more staff and we are currently developing the plan for increased teacher participation next year. We plan to begin the proposed school with this detention design and also work directly with students on how to decrease the number of students earning detentions.

Relationships between students and adults and between students are critical to the success of our model. We aspire to be true partners with our families in our students' education. Last year, we identified circles as a structure to support increased relationship building. All staff were trained by Umoja Community Development Corporation on circle facilitation - different from but aligned to the deeper training of our expert staff circle keepers. We have since implemented weekly circles in student advisory. Circles allow students to process personal situations and current events in a supportive group setting. We intend to use circles at the onset of our proposed school. We will follow a similar training plan for staff to ensure fidelity across schools.



### **Support for Diverse Learners**

Intrinsic continues to be highly sought after by families of diverse learners. When asked, families share that our reputation as a warm and secure school in combination with our personalized learning academic model provides an ideal learning environment for their student(s). We have learned how to better support our students, families, and staff through regular review of data and feedback. Over the past years, we have refined structures to ensure we are providing timely and appropriate interventions to meet students' needs. Specifically, we have implemented summer programs, engaged in deeper analysis of student setting and related outcomes, determined structures for more effective progress monitoring, and created more opportunities for students and families to explore postsecondary options. Before last summer, two of our special education teachers were trained on Just Words®, a program from Wilson Language Training. Just Words® is a Tier 2 intervention for both decoding and spelling automaticity, designed for students in grades 4-12 who have mild to moderate gaps in these areas. In the summer of 2017, students who could benefit from this intervention were given the option to attend sessions to work with support from our trained teachers. As a result, these students are now reading more words per minutes and feeling more confident in reading across all content areas.

We have also spent a considerable amount of time analyzing our diverse learners' progress respective to their LRE setting. We work with families & students regularly to ensure students are in the most optimal setting in accordance with their IEP and most conducive to their growth. Our older students lead their own IEP meetings and we have an increase in their agency and advocacy as they articulate their strengths and learning goals. Additionally, we have built dedicated time in our schedule and calendar for our special education teachers to effectively and consistently progress monitor students on their caseloads to ensure students are meeting their IEP goals and increasing their postsecondary access. We have also built a regular cadence for our special education department to collaborate, balancing time when they are engaged in content-specific department time and when they are meeting with colleagues to discuss data and best practices with respect to our diverse learner population.

Lastly, we continue to build partnerships and host events for students and families. This year a Transition Fair, where 5 community agencies with 10 representatives provided information about various postsecondary opportunities and supports for students with disabilities to 40 families in attendance.

Looking to the 2018-2019 school year, we will add an additional case manager who will support teachers directly with coaching and related professional development. The case managers will have a holistic view of department needs and will provide more targeted support for teachers, which in turn, will lead to improved outcomes for our students.

We believe that the addition of a second campus will not impact these key priorities. Because of our tight model, we will simply implement them consistently across the two schools.

## **Section 3.2: Academic Capacity**

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### **3.2.1: Implementation of Educational Model**

*Describe the process for ensuring that each new school implements the non-negotiable, fundamental features of the educational model as described in the overview from Section 3.1.1. Discuss any aspects of the implementation process for which the new school(s) will be autonomous.*

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Intrinsic Schools will operate using a tight organizational model with common standards and practices established across all schools. The non-negotiables detailed in Section 3.1.1 dictate that each school will be anchored with similar: technology infrastructure, use of technology, learning environments, instructional methods, and commitments to data driven, rigorous instruction. All intrinsic schools will focus their efforts on increasing post-secondary access, implementing personalized pathways, fostering students' identities and sense of community, and developing student agency. We are confident in our ability to maintain consistency from school-to-school through:

- Strong and consistent leadership training and internal principal pipelines
- Facilities that mirror the unique design of our first school
- A centralized role in disseminating best practices
- A common technology platform
- Common practices for teacher observation and feedback

#### **Leadership Training**

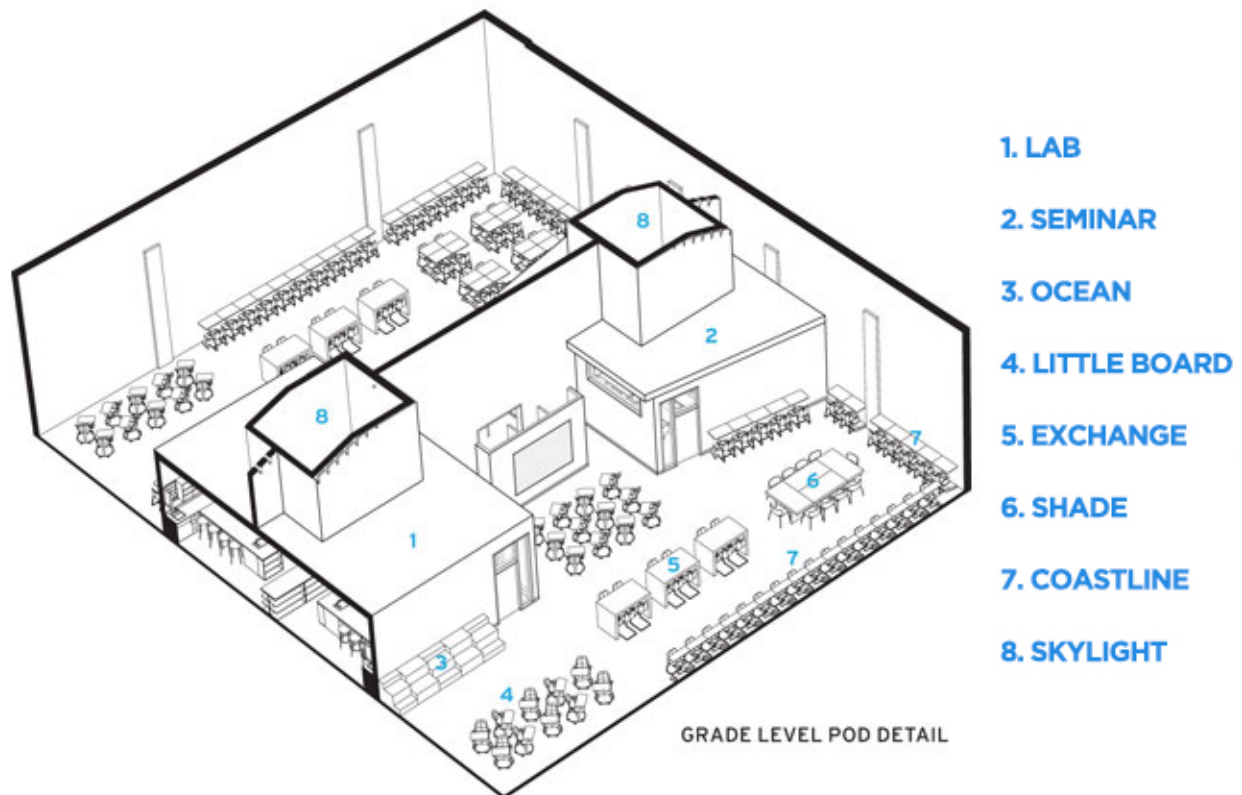
Melissa Zaikos, Intrinsic's Founder and CEO will oversee the training and leadership preparation for new Intrinsic principals. As stated earlier, our intention is to promote from within. This will help to ensure consistent leadership practices across campuses resulting in standard implementation of the educational plan at each new school. Principal training programs will be personalized to focus on each individual's specific strengths and weaknesses. However, all principal trainings will include a gradual release where new leaders are engaging in leadership activities jointly with Melissa or another school principal at the beginning and growing over the course of a year to serving as a school principal. Melissa will train principals in the following key areas:

- Teacher observation and feedback
- Teacher recruitment
- Support for diverse learners
- Intrinsic culture implementation and leadership
- Leading school events and initiatives
- Developing and leading professional development
- Data driven instruction
- Planning
- School operations

As a principal assumes the leadership of a new school, Melissa will continue to work with them to provide coaching, feedback and oversight on an ongoing and consistent basis.

## **Facilities**

Intrinsic's unique facility design is a critical component of our educational program and will be replicated at the proposed school. The diagram below details how the Intrinsic Pod is set up and how it is used in our educational model.



## **Centralized Dissemination of Best Practices**

Intrinsic is a learning organization that will continuously iterate and evolve. We encourage teachers and school leaders to test or pilot new instructional techniques, digital content, curricula, etc. We are an organization that encourages staff to take risks and try new approaches as we push the Intrinsic model forward. As teachers innovate, we need a mechanism to disseminate best practices and make new tools available to the network of schools. To this end, we have established the network level position of Director of Innovation and Collaboration. The Director of Innovation and Collaboration provides support for the evolution of the learning model as well as project management around various pilot programs and facilitates shared learning across schools. In this role, the Director of Innovation and Collaboration will support teachers individually and in teams on how to best use online programs to inform blended and in-person instructional practices. Further, she will work with the schools leaders to determine professional development needs and lead professional development efforts related to implementation of best practices.



In addition, best practices will be shared through joint professional development. Both schools will follow the same calendar allowing for common professional development times. We anticipate that during the six teacher institute days as well as the August professional development time, we will bring staff together from both campuses to work together and learn from one another.

### **Technology Platform**

Our technology suite, has been developed through ongoing collaboration among teachers and administration, leading to the identification of new opportunities: some based on tried-and-true traditional approaches that we believe will see new life in a digital environment; others that will create new standards around instruction, planning, and experience. We have found ourselves with a relatively stable suite of tools as we now work to integrate and manage them more seamlessly while sharing where we can. It can be difficult for a school to manage their edTech app suite ensuring that all applications are accurately rostered and a clear authentication process has been implemented to ease accessing of the tools. We've created a comprehensive scripting library that operates in the background keeping everything running smoothly. This library refreshes our report caches enabling all of our Google Data Studio reports to remain up to date, calculates metrics important to the school such as Current GPA and stores them in our SIS, runs compliance checks on our SIS data, and refreshes our rosters in Clever so that many edTech apps such as Summit Learning Platform, Imagine Math, and Remind stay up to date. This library has enabled us to have tech for the teacher "just work" so they can focus on teaching and not troubleshooting.

Intrinsic is an active member of Data Whiz, a community of technology and data specialists representing around 350 schools and 145,000 students. The scripting library as a whole cannot be shared due to it being specialized for Intrinsic Schools. However, we will be continuously integrating parts of it into a product called the Data Visualization Starter Pack. This is a free, open source tool distributed via InnovateEDU to schools just getting started with visualizing data. This means Intrinsic will be an innovation hub experimenting with new ways of bringing data together and when ideas reach a certain point of maturity, they will be shared with schools that are at an earlier stage of their data reporting.

The technology platform will be integrated seamlessly into the proposed new school.

### **Observation and Feedback**

At Intrinsic, we view the teacher observation and feedback cycle as a core component to our students' academic success. We are committed to observing all teachers on a monthly cycle that includes observation and debrief meetings, which account for roughly 40% of the principal's time. Assistant principals and deans are also engaged in teacher observation and feedback. To date our observation and feedback has been based on the Uncommon Schools model as detailed in the book *Leverage Leadership* by Paul Bambrick-Santoyo. While we have found these techniques to instrumental to our success, we are adapting and building upon them to increase their relevance to our model. To this end, we are:

- Focusing meetings more on student work products rather than teacher delivery
- Differentiating support for teachers based on their experience and outcome
- Increasing the use of video to allow for greater clarity and teacher reflection
- Integrating technology tools for observation and feedback
- Working with teachers both individually and in teaching teams





Through Intrinsic's evolving observation and feedback practices, we will be able to ensure that teachers across the Intrinsic network are using the most effective instructional techniques in a manner that is standardized from school to school.

### **School Level Autonomies**

School principals will work collaboratively with the CEO to identify opportunities to further develop the Intrinsic model. As a team, they will explore all aspects of the education plan and its implementation both at individual campuses and across the network. The most significant school level autonomies will be tied to piloting new ideas, instructional approaches, curricula, digital content, and mechanisms for increased personalization for students. Prior to implementing a new idea, principals would work with the CEO to define the scope and size of the pilot. Pilots would be monitored and evaluated to determine their potential impact across the Intrinsic network. Other school level autonomies would primarily be tied to school operations and student programs such as field trips, extracurricular programs, or homework clubs.

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### **3.2.2: Deviations from Existing Educational Model**

*If the educational model proposed in the new school(s) differs from the existing schools by educational philosophy, instructional strategies, curriculum, or student learning supports, highlight the key distinctions (if known) and the rationale for the changes. If aspects of the educational model have not been finalized, provide a timeline for finalizing the educational plan prior to school opening, citing specific tasks, deadlines, and responsible parties.*

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The new schools will not deviate from the existing educational model except as it relates to testing new ideas and experimentation through limited and controlled pilots as discussed above.

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### **3.2.3: Oversight of Academic Performance**

*Describe the organization's approach to academic performance management at the network and school levels. What performance management systems and benchmarks will the organization use to formally assess academic progress?*

**Interventions:** *How do network leadership, the board, school leaders, and the MO (if applicable) monitor and diagnose underperformance of individual school(s)? How do they identify underperformance and determine and implement appropriate intervention(s)?*

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School-wide performance measures and evaluation are vital to school success. We believe that student growth and performance measures should align to the school-level metrics and measures. The intention is to both identify best practices while setting targeted supports for students and guide our board of directors and parent community to make better decisions.

Ultimately, the board sets the strategic direction for the organization and the CEO manages implementation and accountability toward that vision via the school principals.

While setting up structures and protocols for performance management, we have identified indicators and benchmarks of school performance and growth against which the school's success will be evaluated





on an annual basis. Our strategic plan reflects alignment between growth and performance leading to our school's success in using data with instructional best practices.

All the measures identified in Intrinsic's strategic plan comprehensively aggregate key school-wide metrics and measures that support fulfilling our mission and vision. The 5essentials survey administered through the University of Chicago Consortium on School Research (CCSR) measures schools in terms of strong school culture, ambitious instruction, collaborative staff, involved families, and effective leaders (the five essentials). We believe the survey results will provide us a snapshot of the school level conditions for success via student and teacher responses. CCSR findings, which include 20 years of data on Chicago Public Schools, conclude that schools strong in three of these five essentials "are 10 times more likely to improve in math and reading." [1] We aim to receive an indicator score of Organized or Well Organized during every year of operation to ensure our school environment maintains high expectations for all students in a safe, nurturing environment.

We have set ambitious targets to track our progress with respect to academic growth, academic attainment, participation, and habits of mind. A significant component of our academic system is to also measure the efficacy of our next generation learning model. As such, our strategic plan incorporates school level metrics on student growth from the CPS School Quality Rating Policy, school climate and culture benchmarks established internally, and evidence-based measures from successful blended learning schools across the country. The table below provides key benchmarks from the CPS SQRP to attain Level 1+ status among Chicago Public Schools. These indicators serve as benchmarks for Intrinsic's school level growth and performance metrics.

The key benchmarks that we will use to determine whether a school is meeting its academic targets are tied to scoring a minimum of a 4.0 on the SQRP rating. Schools that are meeting the criteria for a 4.0 on all measures will be considered surpassing expectations. Those with scores that include both 3.0 and 4.0 will be identified for support and reviewed by the CEO, and those with scores below 3.0 will be considered to need intervention by management.

High School Performance Indicators	
Performance Indicator	4 points
11th Grade SAT 3-Year Cohort Growth Percentile*	Between 70th and 89th percentile
Priority Group 11th Grade SAT Growth Differential (evaluated separately for African-American students, Hispanic students, English Learners (ELs), and Diverse Learners)*	Between 50th and 69th percentile
10th Grade PSAT 2-Year Cohort Growth Percentile*	Between 70th and 89th percentile
9th Grade PSAT 1-Year Cohort Growth Percentile*	Between 70th and 89th percentile

Percent of Students Meeting College Readiness Benchmarks on PSAT/SAT	Between 60% and 79.9%
Average Daily Attendance Rate (Grades 9-12)	Between 90% and 94.9%
Freshman On-Track Rate	Between 80% and 89.9%
1-Year Dropout Rate	Between 2.1% and 4%
4-year Cohort Graduation Rate	Between 75% and 84.9%
Percent of Graduates Earning a 3+ on an AP Exam, a 4+ on an IB Exam, an Approved Early College Credit and/or an Approved Career Credential	Between 30% and 39.9%
College Enrollment Rate	Between 65% and 74.9%
College Persistence Rate	Between 75% and 84.9%
My Voice, My School 5 Essentials Survey	Organized
Data Quality Index Score	Between 95% and 98.9%
<p><i>*NOTE: During the 2016-2017 school year, the state adopted the SAT as the official state mandated exam for 11th grade and Chicago Public Schools adopted PSAT 9 and PSAT 10 as the mandated exam for 9th and 10th grade students. The 16-17 school year was the first year of implementation for PSAT/SAT. As a result, ACT growth and attainment measures for high school were replaced with PSAT/SAT growth and attainment measures. This also allowed assessment data for 9th and 10th graders to be included in SQRP for the first time since ratings from the 14-15 school year. Calculations for high school growth are based on growth between NWEA (8th grade) and the grade appropriate test for each student - PSAT 9, PSAT 10, and SAT. 8 Calculations for high school attainment are based on the percentage of students meeting or exceeding Combined College Readiness Benchmarks established by College Board.</i></p>	

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[1] <https://uchicagoimpact.org/5essentials>

Our educational metrics and goals reflect a multi-dimensional view of school and student growth and performance. We believe the specific, measurable, attainable, realistic, and time-bound academic and non-academic goals that we have outlined in our rigorous accountability plan manifest our commitment to the students we serve in ensuring they are ready and prepared for the 21<sup>st</sup> century. Our school level metrics are designed to measure the effectiveness of systems and structures in generating high levels of



achievement in terms of growth and performance. Hence, our goal is to meet the criteria to score a 1+ on the CPS SQR. Learner profiles and students' postsecondary plans will gauge student progress toward making the necessary academic growth to score a 1000 or higher on the SAT and maintaining a 3.0 or higher GPA, which increases access to colleges with higher graduation rates. Because of our intense emphasis on post-secondary success, we will also track participation and habits of mind. We believe autonomy, perseverance, and independence are needed for success in college, career, and in life — this will be measured by the MESH Survey and in-house rubrics.

In the event that a school does not meet academic performance measures, the CEO will support the school principal in analyzing the cause of the low performance and developing a set of interventions to address the situation. Interventions at the school level could include:

- Leadership coaching for the principal
- Frequent instructional walk-throughs with the CEO, members of the network team and principals to identify and analyze sources of shortcomings
- Targeted use of staff development time to provide strategies for teacher to address academic shortcomings
- Collaboration with other schools that are achieving strong results in areas of deficiency
- Working groups with staff, students and families to develop solutions to areas of concern

In the event that the above interventions do not yield the desired results, the CEO will determine the cause of the deficiency and work with the board to determine next steps. These could include hiring outside support or ultimately making a leadership change at the school.

As the CEO is ultimately responsible for the academic health of each school, the board will hold the CEO accountable for these results. The CEO will report academic results to the board as they are available and discuss any areas of concern. In the event that the schools are failing to meet benchmarks the CEO will provide the board with an action plan. The board or designated board members will meet regularly with the CEO to monitor the action plan and its implementation.

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*(If the MO or operator has an existing school that is not meeting academic performance standards): **Low Academic Performance:** Why is the organization applying to add school(s) at the same time that existing school(s) are not meeting academic performance standards? How does the organization plan to significantly improve the academic performance of these existing school(s) while simultaneously opening new school(s)?*

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Not Applicable

### **Section 3.3: Operational Capacity**

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#### **3.3.1: Governance**

**Governance Changes:** Describe how the organization's governance structure will adapt to oversee and support the 5-year growth plan and addition of new school(s). Explain any impact on:

- The composition of the board (e.g. any additional types of expertise that the board may seek to help support the growth plan);
  - The board's roles and responsibilities;
  - The board structure;
  - The board's professional development priorities at each stage of growth; and
  - The board's relationship to schools.
- 

#### **How the Board Will Adapt**

The composition and structure of the Board of Directors was created with the vision of developing a network of Intrinsic charter schools. As such, the structure will not change with the addition of the proposed school. Furthermore, the board's responsibilities scale appropriately from governing one school to two schools.

#### **Board Composition**

The Intrinsic Schools' Board of Directors has extensive leadership and oversight experience in both the corporate and non-profit sectors. They have demonstrated a strong commitment to the school in both time and resources and have contributed their expertise in key areas such as strategic planning, education, finance, law, fundraising/development, human resources, technology, and operations. Following are brief bios for each board member:

**Jim Frank, Chairman of the Board** –Jim Frank is Executive Chairman of the Board of Wheels, Inc. Wheels founded the Fleet Management Industry in 1939 and, under Jim's direction since 1975 has been a leader in Innovation, growing from 25,000 vehicles to become one of North America's premier fleet management providers with over 300,000 vehicles under management in North America and over 1 million vehicles in 40 countries in partnership with ALD. Jim has held leadership roles in Industry Organizations, been keynote speaker at NAFA and AFLA national conferences and has represented the Industry before the US Congress, Federal Trade Commission, U. S Treasury, and the Financial Accounting Standards Board.

Jim has a Bachelor's degree from Dartmouth College and MBA from Stanford University. He is actively involved in Community affairs, serving on the Boards of: University of Chicago, Field Museum of Natural History, Illinois Network of Charter Schools, The Chicago Public Education Fund, Vice Chair of the University of Chicago Medical Center where he was recently recognized as an "Honorary Fellow of the Division of Biological Sciences, and Chair of the Board of Intrinsic Network of Charter Schools.

**David Epstein** – Epstein is an entrepreneur with diverse experiences including in the areas of strategy, organizational management, start-up execution, finance and trading, law, real estate and construction. Epstein is a current Board member and has been an integral member of the design team to date making major contributions in strategy, governance and facility related matters. His broad range of expertise working with diverse organizations makes him a valuable Board member.



**Harriet Meyer** – Meyer, M.A., is a nationally recognized leader in shaping public policies and creating innovative programs that help young, at-risk children and their families. In two decades as President of the Ounce of Prevention Fund, she established the organization as a national leader in advocating for and providing effective, research-driven early childhood education. Meyer has helped to shape policy, programs and funding for early childhood at both the state and national levels. Meyer also currently serves on a number of philanthropic and civic organization Boards. Meyer’s experiences managing a highly successful education non-profit organization, education advocacy and Board experiences will make her a valuable addition to the Board.

**Jim Palos** – Palos is currently the executive director of the Hyde Park Institute. Formerly, he served as the president of Wright College, the largest of the City Colleges of Chicago. In 2002 Palos founded and served as the first president of the Institute for Media and Entertainment (now a part of IESE Business School). The Manhattan-based school provides management education for media and entertainment executives. Previously Palos founded the Latino Education Alliance, an initiative to improve educational opportunities and outcomes for Latino students in Illinois. Palos received his BA from Columbia University in New York and his MBA from the Kellogg School of Management. Palos is a member of the Alumni Council for the Kellogg School. For six years Palos was a member of the Illinois State Board of Education. He is a past Fellow of Leadership Greater Chicago, and served as president of the alumni board for the organization. He was selected by *Crain’s Chicago Business* for its “40 under 40” listing.

**Justin Manly, Treasurer of the Board** - Manly is a Principal in the Chicago office of The Boston Consulting Group. He works primarily with Consumer Products companies in strategy and operations. He is a core member of the Consumer and Strategy practice areas and is an Innovation Strategy Topic Expert. Prior to joining BCG, Manly worked at Piper Jaffray where he focused on wealth management and institutional fixed income sales. He also spent time in the technology investment-banking group at Merrill Lynch. Manly holds an MBA with high distinction from the Ross School of Business at the University of Michigan. He also earned his Bachelor’s Degree in Economics from Dartmouth College.

**Josh Tolman** -Tolman has spent the last twenty years building quality software solutions for companies and consumers, with the last ten years focused on starting, growing, and selling Greenline Financial Technologies, a global electronic trading software company. Most recently, Tolman has shifted his focus towards education technology, serving as CTO of ThinkCERCA, an online provider of award-winning tools and resources to help schools personalize critical thinking instruction. Prior to becoming a member of the Board, Tolman also served as a strategic technology advisor for Intrinsic, and also serves on the board of CameronTec Americas. Tolman holds a BS in Computer Science and MBA in International Business from Washington University in St. Louis.

### **Board Roles and Responsibilities**

The Intrinsic Schools Board is ultimately responsible for the effectiveness and success of each of the Intrinsic Schools. While the staff of the CMO and individual schools is charged with the day-to-day management of the schools, the Board sets long-term goals and strategy, provides current oversight of the finances and programs of the school and ensures compliance with applicable laws, the bylaws and the charter. The following key roles and responsibilities will remain the same as we expand from one school to two schools:

- **Academic Oversight** – The Board, working with the CEO and school staff will set academic goals for each year. The CEO and school staff will design curriculum, implement programs, allocate resources



and collect data. At each Board meeting real-time data on student performance will be presented to the Board, and adjustments to academic programs and/or resource allocation will be considered on a frequent basis in line with the Intrinsic value of continuous improvement.

- **Financial Oversight** - Prior to the beginning of each fiscal year, the CEO will present an annual budget to the Board for approval. The Board will review and approve the annual budget for each school and for the organization as a whole, and any material changes to the budget will require the Board to approve an amended budget. At each Board meeting, the Board will review the financial statements of each school and the organization. The Treasurer of the Board and Finance Committee will monitor the school's financial health and activities on a monthly basis. The Board will hire an auditor and review and approve the annual audit of the organization. At each meeting the Board will also receive updates regarding each facility and its operations. The Board will also approve all financial policies that set the processes and controls for contracts, expenditures, and internal control.
- **Operational and Legal Oversight** –The Board will provide oversight for all activity related to acquiring and constructing new school buildings.

The Finance Committee of the Board will recommend operating policies and procedures to the full Board to ensure that the Intrinsic Schools meets all CPS, State and Federal compliance requirements. Annually the Finance Committee of the Board will review the full set of Intrinsic policies and procedures to verify that they are complete, comprehensive, and meet all applicable laws. As necessary, the Board will retain an external lawyer to review the policies in part or in their entirety.

- **HR Oversight** – The Board will hire, set the salary and benefits for, and evaluate the CEO. Additionally, the board will work with the CEO to set annual goals and periodically provide feedback on progress toward those goals. The CEO, in turn, will hire and propose the salary for each school principal and each other employee reporting to the CEO. The Board will also set major policies and procedures for school operations and HR matters.
- **Outreach and Fundraising** – The Board will set the schools' mission, monitor the performance of the schools and take necessary actions to ensure that the schools remain true to their mission and charter. Board members will make a personally meaningful financial contribution to the organization each year and will support all major fundraising campaigns. Board members will raise public awareness regarding and fundraise for the organization – including making introductions to their personal networks. Finally, Board members will use their expertise and skills to assist the organization as appropriate.

### **Board Structure**

The Board is composed of a minimum of 5 and a maximum of 10 voting directors. In addition, the Intrinsic Schools CEO serves as an ex officio, non-voting Board member. Directors are elected for staggered three-year terms with approximately one third of the Directors up for election each year, with the exception of the CEO who will serve as a nonvoting Board member for the duration of his/her employment as the CEO.



The officers of the Corporation shall consist of a Chairperson of the Board of Directors (“Chairperson of the Board” or “Chairperson”), a Chief Executive Officer (“CEO”), a Secretary, and a Treasurer. This structure will not change.

#### **Board Professional Development Priorities**

The Intrinsic board of directors receives professional development on an ongoing basis. At each board meeting a member of the staff presents programmatic information and data to the board to keep members abreast of school activities, successes and areas needing improvement. This practice will continue as we launch our second school.

Additionally, the board holds an annual retreat where it conducts a self-assessment, sets the strategic vision for the year to come, and identifies any areas requiring additional training or support. As the board is comprised of a highly seasoned team of executives and non-profit leaders who have deep non-profit board experience it does not require the training and development often needed by less experienced start-up boards.

The board members also have extensive experience with both start-up and rapidly expanding organizations. As such, they are well positioned to provide the governance, oversight and support necessary to launch our second school.

#### **Board Relationship to Schools**

The Intrinsic Schools Board of Directors holds ultimate responsibility for the operation, fiscal health and academic achievement of all of the Intrinsic Schools. Board members demonstrate a personal connection with and commitment to the mission, values and culture of the Intrinsic Schools, and represent diverse expertise and skill sets of high value to the organization, including strategic planning, education, finance, law, fundraising/development, human resources, technology, operations and community engagement. The Board will meet on a bi-monthly basis. The location will rotate between Intrinsic’s campuses.

The Board of Directors directly oversees the CEO of Intrinsic Schools, Melissa Zaikos. Zaikos who, in turn, oversees both the Network staff and the principals of each Intrinsic school. This structure establishes clear lines of authority and responsibility for all staff. For a more detailed description of the Board’s relationship to the schools, please see the section above: Board Roles and Responsibilities.

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***Updating Policies and Forms:*** Discuss the process for updating and managing the Ethics Policy and Conflict of Interest statements for all board members. Policies to establish clear guidelines for board members and employees to act in the highest ethical manner to preserve the public trust of residents and taxpayers are essential to a successful charter school.

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Intrinsic Schools has an ethics policy and conflict of interest policy that meet all CPS requirements. In addition, board members complete the annual conflict of interest forms and assurances statements. We do not believe that these forms will need to be updated as we add a second campus. We review these policies on an annual basis and will update and modify them as necessary at that time.



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**3.3.2: Start-up Plan**

*Describe the activities that the design team will undertake in the planning year(s). Explain who will work on a full-time or part-time basis between approval and school opening and how the school/network will compensate these individuals during this period.*

*In an attachment, provide a timeline for completing the array of activities required to successfully open a new school, including:*

- *Defined tasks with identified owners, start dates, and deadlines;*
  - *The hiring process and schedule;*
  - *The creation of non-academic documents and policies; and*
  - *Procuring supplemental services such as food service, insurance, technology support, etc.*
- 

The proposed school is a replication of Intrinsic's first school that opened in Fall 2013. As such, Intrinsic Schools already has many of the systems in place that one would normally expect to see in the start-up plan for a new school. For example, we have already developed tools such as the student handbook and have secured employee benefits. Additionally, we have procured the supplemental services and tools necessary to operate a successful school such as outsourced clinicians, insurance, payroll services, student information system, accounting system, etc. Therefore, the attached start-up plan is an abbreviated version of a typical plan.

The three areas of activity that are critical to a successful startup plan are:

1. Identification and construction/renovation of a permanent school building
2. Student recruitment and community engagement
3. Hiring new school staff

Eighteen months prior to a school opening, Intrinsic will engage in a facility search to identify a permanent home for the school. The network office team will lead these efforts.

One year prior to a school opening, the network staff will work on the student recruitment efforts for the new school. The incoming principal will join the team to lead these efforts beginning in January prior to opening. We believe that it is essential for the Principal to develop a presence in the community and establish relationships with potential community partners. The new school's office manager, who will manage all day-to-day work associated with the launch of the new school, will join the Principal.

Six to nine months prior to the school opening, the future Principal will work with the CEO to begin the staff hiring process for the new school. Our goal is to have all school staff hired by the end of March prior to the launch of the school. New school staff will begin their professional development activities in early August.

For all other new school launch related activities, the network office staff will support the Principal and Office Manager in ensuring that all Intrinsic policies, procedures and operating norms are well established prior to the beginning of August. Please see the attached start up plan for additional detail.

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### **3.3.3: Network Supports**

*Designate school-level, network-level, and MO-level (if applicable) decision-making authority for key functions by completing the table in Attachment 1. Note: If proposing to partner with a MO, the information provided in this table should align with the description of roles and responsibilities in the draft MO contract.*

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As discussed in the response to 3.2.1. Implementation of Educational Model, and indicated in Attachment I, Intrinsic will operate a relatively tight organizational model. The majority of school level autonomies are related to piloting new ideas, school operations and student programs. However, the network's approach to management of schools is highly collaborative and we anticipate that principals of future Intrinsic Schools will work closely with the network leadership to continuously adapt and improve the Intrinsic model.

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#### *What role does the network play in supporting expansion and the incubation of new school(s)?*

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The network office is the driver of Intrinsic's expansion and will provide significant incubation support to newly launched schools. As it relates to expansion efforts, Intrinsic's network office will be directly responsible for the following key activities:

- Principal selection and training
- Site selection and oversight of facility renovation and related activities
- Developing the philanthropic support necessary to launch a new school
- Developing and rolling out all operating office system
- Creating and implementing Intrinsic policies and procedures

New school incubation will be led by the principal once identified with significant support from the network office team as described in the Start-up Plan. We recognize that it is essential to have the right network office team in place to facilitate expansion and ensure the successful incubation, launch and ongoing operations of new schools. To this end, we have developed a seasoned and highly skilled network office team to lead these efforts. The caliber of the current network office team is unusual for a young network. Key leadership staff include:

**Melissa Zaikos**, Founder, CEO and Principal, has direct experience leading first Intrinsic School as the principal and leading the Intrinsic organization as the CEO. Under Zaikos's leadership, Intrinsic has had a highly successful first two years of operation. It is important to note that Intrinsic received a rating of 1 on the SQRP for its first year of operation and maintained a very strong balance sheet. Prior to launching Intrinsic, Zaikos was the CPS Network Chief for the Pershing Network, a network of schools in the Southwest communities of Chicago, comprising students who are 71% Latino, 13% African American, 10% Asian and 6% white/other. Despite the fact that Pershing's students were also 92% low income (qualified for free and reduced meals) and 34% English Language Learners, average growth during Zaikos' leadership was 61% in Reading and 65% in Math in 2011-2012, results that would place any individual school in the top quartile for growth nationally. From 2005-2011, Zaikos was the Chief Area Officer for the AMP Schools, managing a \$7 million departmental budget and overseeing more than 100 schools within CPS, where student performance increased from 68% to 87% of students meeting or exceeding standards on the ISAT. Under her leadership, the AMP Schools led the district in data-driven



instruction as the first schools to utilize the Northwest Evaluation Association MAP assessment, which is now used district-wide. The AMP Schools also led the district in piloting various online curricula including ST Math and Compass Learning. In 2006, she led a team to secure a \$21.3 million grant for the district high school transformation strategy from the Bill and Melinda Gates Foundation, the largest grant to date at that time from the Gates Foundation to a public school district.

Zaikos has a strong track record of developing district leaders, with six of her direct reports having been promoted to Chief of Schools. In addition, Zaikos has served as evaluator for the CPS principal eligibility process and has worked with Local School Councils throughout Chicago to hire over 50 Principals. Prior to her career in education, Zaikos was a business strategy consultant with Deloitte Consulting. She holds a Master of Business Administration from the Harvard Business School and B.S. in Industrial Engineering from Texas A&M University. She was a member of the Broad Fellowship for Education Leaders in 2011 and the Broad Residency in Urban Education from 2003-2005. She also served on the Executive Committee of the Board of Trustees for Cristo Rey Jesuit High School.

**Matthew Shaw**, CFO, has 17 years of experience as a leader in the charter schools sector. He has supported individual schools and school networks across the country in their strategic growth and financial management. For the last 13 years Shaw has been a business and strategic consultant to charter schools, authorizers and funders with clients that include: Intrinsic Schools, LEARN, New Schools for Chicago, Chicago Public Schools, Noble Network, Chicago International Charter School, Chicago Education Partnership, KIPP San Antonio, National Association of Charter School Authorizers, Illinois State Charter School Commission, SUNY Charter School Institute, and many others. Shaw's consulting experience includes supporting schools and networks during their incubation, start-up, expansion and steady state operations. Prior to consulting, he was the Director of Operations for Perspectives Charter School where he managed all aspects of the school's finance and operations. Shaw holds a B.A. from Washington University in St. Louis, and an MBA from the Kellogg School of Management.

**Marcos Alcozer**, Director of Technology, has led all technology related initiatives for Intrinsic Schools, including the design and implementation of every aspect of Intrinsic's technology environment. Prior to joining Intrinsic, Alcozer spent eight years serving as the technology coordinator for Northside College Prep High School in Chicago that is ranked as the number one school in Illinois and the number 33 school in the nation by US News and World Report. Alcozer brings experience leading a school-wide 1:1 device initiative, is a certified Google Educator and has developed software for school scheduling needs. He has expertise in student information systems, learning management systems and on-line grade books. In addition, he led a group of student to support school technology needs.

**Ami Gandhi**, Director of Innovation and Collaboration, oversees personalized learning plans and school-wide processes for student goal-setting in addition to working vetting and designing pilots for online programs. Gandhi is a Golden Apple scholar and seasoned instructor with experience coaching school leaders, training teachers and conducting professional development. Before joining Intrinsic, Gandhi worked alongside Zaikos in the Pershing Network as an Instructional Support Leader, facilitating training in EXPLORE, Common Core Mathematics Standards, and Differentiated Math Instruction with NWEA data. She also has extensive experience developing Response to Intervention plans as the RtI Coordinator/Instructional Manager for AMPS from 2010-2011. From 2006-2011, Gandhi was a highly successful Algebra teacher at Whitney Young Magnet High School, where 100% of her 7<sup>th</sup> grade students (452 students in total) exceeded the state standards on the ISAT and 96% passed the district Algebra exit exam as 7<sup>th</sup> graders. She holds a Master of Science in Mathematics Education from the Illinois Institute



of Technology, a Type 75 administrative certificate and a B.S. in Education and Social Policy from Northwestern University.

**Edwindra Johnson, Chief of Staff**

Edwindra Johnson is the Chief of Staff to the CEO and focuses on external relations as well as strategic planning for the school. Before joining Intrinsic, she worked at Baxter Healthcare where she held various roles in marketing, operations and strategy. While at Baxter she had the opportunity to work both in Switzerland and the United Kingdom. Prior to joining Baxter, she worked in finance at GE Healthcare and in real estate at Continental Properties. She holds a Bachelor of Science degree in economics from the Wharton School of Business at the University of Pennsylvania and earned her MBA from Kellogg at Northwestern University. She is currently a member of the 2017-19 cohort of the Broad Residency in Urban Education and is certified as a professional coach.

The network office is currently comprised of seven individuals:

- CEO
- CFO (consultant)
- Director of Information Technology
- Chief of Staff
- Director of Innovation and Collaboration
- Director of Finance and Operations
- Finance and Operations Assistant

As we launch school two and during its first few years of operations, we intend to hire the following positions:

- Director of HR
- Director of Marketing and Development
- Compliance Manager
- Recruitment Associate

These additional network employees will help us to ensure that we are providing the schools with the high quality services to which we have committed. In developing this staffing plan, we have had the benefit of learning from both seasoned and emerging charter school networks both in Chicago and nation-wide. As we move forward with our replication plans, we are highly confident that this team will provide the wide range of network office functions described throughout this proposal to our newly launched schools.

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*Explain the role of any national, state-wide, or regional offices in supporting the proposed school(s) once in operation (if applicable). Describe any services, goods, or resources that these offices will provide to support the academic, financial, or organizational operation of the school(s).*

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Not Applicable

### 3.3.4: Human Capital

**Leadership:** If known, briefly describe the identified school leader(s), including their experience and training. Explain how these individual(s) are well qualified to launch and lead the proposed school. Describe plans to address any gaps in skill or experience in order to ensure success in a given role.

Not Applicable

**Scaling Up:** How many new hires (teachers, network staff, and other key school support staff) will the organization have to make each year if approved to open the proposed school(s)? Discuss the organization's current capacity to meet these demands, considering previous hiring patterns, current retention rates, and human resources capacity at the network level.

Intrinsic Schools will make the following new hires each of the next five years:

	FY20	FY21	FY22	FY23	FY24
School Leaders	3	1	1	1	0
Teachers	11	21	15	16	4
Network Staff	1	2	1		
Other Key Supporting Staff	9	4	4	2	0
Total	24	28	21	19	4

Intrinsic is very well positioned to hire the staff listed in the table above. Despite a competitive teacher job market, we receive roughly five applicants for every opening. Additionally, over 40% of our hires come from staff referrals, thus helping to maintain a steady pool of candidates. When we make a teacher job offer, over 80% of those individuals accept the position. The CEO and Intrinsic 2 principal will invest a significant amount of time to staff recruitment efforts. Additionally, as noted above, Intrinsic will hire a director of human resources and a recruitment associate. Both of these individuals will play significant roles in the recruitment and hiring of staff for Intrinsic 2.

As more teachers learn about us, we attract candidates from highly successful traditional schools that are seeking an environment for creativity and believe in personalized learning. We are also highly competitive in recruiting new teachers out of top universities. This is helpful in building a staff with a variety of past experiences and avoiding groupthink around our school design.

As stated above, collaboration, team teaching and use of data to inform instruction all improve the effectiveness and efficiency of both our teachers and administrators.

Additionally, Intrinsic's teacher retention are extremely high, 82% year over year. Teachers report the level of collaboration at Intrinsic is a key to their success and job satisfaction. They also appreciate having a voice in the school design that we believe will become a model for personalized learning nationally. Our team is extremely mission-driven and is committed to the development of a model as our way to uniquely contribute more broadly to urban education. This too, impacts staff retention.

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**Recruitment and Hiring:** Discuss the organization's capacity and strategy to ensure that these positions and the positions at existing schools will be filled with quality hires. If partnering with a MO, please specify the role of the MO in the selection process.

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Intrinsic has developed an innovative school model with tremendous results for Chicago students. As the school enters its fifth year, CEO Melissa Zaikos and her leadership team are exploring ways to strengthen its diversity, equity and inclusion (DEI) efforts which includes its efforts in recruitment and hiring. In particular, leadership has prioritized building a diverse talented pool of potential hires, strengthening screening activities to limit bias, and developing retention approaches to keep the best and brightest staff within the network.

This recruitment and hiring strategy includes the following:

- Intrinsic will continue to rely on its deep relationships with prestigious, reputable education organizations including those listed below as partners in sourcing high quality teachers:
  - Apple Distinguished Educators
  - Facing History and Ourselves
  - Golden Apple
  - IIT
  - National Council for Teachers of Mathematics
  - National Board for Professional Teaching Standards
  - University Teacher Education Program (UTEP)
  - Teach For America Corps Members and Alumni (TFA)
  - The Broad Foundation
  - Loyola University
  - Relay Graduate School of Education
  - Cohorts of similar schools including:
    - New School Venture Fund
    - Charter School Growth Fund
- Focus recruitment efforts with six target schools within the Chicago community that have Schools of Education. Designated team captains have been identified that have the responsibility to develop partnerships with these school leaders and student populations over time that will not only increase the awareness of Intrinsic but also create an organic recruitment pool.
- Host onsite Hiring Expo coupled with learning sessions to attract innovative teachers. These sessions would focus on topics of interest that align with Intrinsic's model such as personalized learning, DEI, and technology as well as bringing in guest speakers to focus on hot topics that spark debate within the education community such as restorative justice and DACA. While the primary goal of these sessions are to share ideas and support innovation in Chicago, these events also attract and cultivate relationships with innovative teachers who are excited about a more personalized approach to learning that can become candidates for Intrinsic Schools.
- Continue to utilize referrals from current Intrinsic employees, colleagues, and traditional job fairs but also expand efforts to community organizations that may yield a more diverse candidate pool. Ensure that a personalized approach is taken with each candidate throughout each phase of the process.



- Maintain a diverse hiring committee consisting of both teachers and admin to ensure inclusion in the hiring process across various Intrinsic stakeholders and to mitigate any implicit bias that may exist

Given our model, Intrinsic believes that these positions are well suited not only for traditionally trained teachers but also for professionals who are changing their careers to become teachers. It is likely these individuals have deep content knowledge, familiarity with technology and a broader set of experiences from which to draw. We expect to attract these types of teachers by building relationships with Chicago's alternative certification programs, including Chicago Teaching Fellows, NUTEACH and Teach for America. Now that Intrinsic students are taking Chemistry, Physics and Calculus, we also seek practicing seasoned professionals in the field either to be teachers on a part-time basis, similar to adjunct professors at universities, or to switch careers and become full-time teachers.





Our general recruitment plan is outlined in the table below:

Month/Time Period	Action
October - November	<ul style="list-style-type: none"> <li>• Host fall “Hiring Expo” and learning session to attract innovative teachers</li> <li>• Visit target schools and identify potential candidates</li> </ul>
October - December	<ul style="list-style-type: none"> <li>• Cultivate relationships with potential candidates from above               <ul style="list-style-type: none"> <li>○ Maintain communication via personal emails</li> <li>○ Host informal meetings and info sessions</li> </ul> </li> </ul>
January	<ul style="list-style-type: none"> <li>• Launch full hiring process               <ul style="list-style-type: none"> <li>○ Post all jobs to career websites</li> <li>○ Attend career fairs at surrounding universities/colleges</li> <li>○ Formally reach out to education organizations listed above to identify new candidates</li> <li>○ Review partner resume books</li> </ul> </li> </ul>
January – May	<ul style="list-style-type: none"> <li>• Conduct full hiring process (detailed below)</li> <li>• Cultivate relationships with candidates above               <ul style="list-style-type: none"> <li>○ Host informal meetings and info sessions</li> </ul> </li> </ul>
May	<ul style="list-style-type: none"> <li>• Target for all hiring to be complete for the following year</li> <li>• Host Spring “Hiring Expo” and learning session</li> <li>• Cultivate relationships with teachers above               <ul style="list-style-type: none"> <li>○ Maintain communication via blog and personal emails</li> <li>○ Host informal meetings and info sessions</li> </ul> </li> </ul>
August	<ul style="list-style-type: none"> <li>• Host professional development sessions for new teachers</li> </ul>

### Hiring Process

In order to ensure a high quality talent pool, Intrinsic will have the following process:



- Online application completed highlighting the following:
  - Past work experience
  - Educational background
  - Current Resume
  - References
  - Cover Letter
- Phone screen interview with Assistant Principal and Hiring Committee member
  - 30 minutes
  - Screens for alignment with Intrinsic competencies
- On-site interview
  - Approximately 3 hours
  - Tour of the school
  - Sample lesson
  - Culture interview
  - Principal interview

If candidates advance after the phone screen, they will be invited to spend approximately 3 hours at the school. The first portion of the interview will provide an opportunity to tour the school and observe Intrinsic classrooms and culture. Because our model is different than traditional schools, this will give candidates an opportunity to evaluate their fit with our school model and culture.

The second portion of the interview will consist of a sample lesson given to a group of students and members of the hiring team. The candidate will receive the grade level and subject area of the sample lesson at least one week before the lesson. Members of the hiring team will use a rubric, similar to the teacher observation rubric used in Intrinsic classrooms, to evaluate the lesson. At the end of the lesson, the candidate will debrief with members of the hiring team, while the students complete a short survey about the candidate's lesson. This survey will allow for a student voice in the hiring process.

The final portion of the process will consist of two different interviews. The candidate will interview with the Assistant Principal for a culture interview. Finally, the candidate will interview with the Principal.

Although it will not be a requirement that teachers and administrators have blended learning experience, we will require both teachers and administrators to have a strong technology background or an eagerness to implement technology in the classroom due to the model of Intrinsic.

### **Section 3.4: Financial Soundness**

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#### **3.4.1: Five-year Financial Plan**

**Budget and Budget Narrative:** Complete the Budget Template for Existing Operators. In a budget narrative, explain how the five-year financial plan will support the proposed growth. Clearly identify assumptions. Note which expenses rely on fundraising. Discuss contingency plans if revenues are lower or expenses are higher than expected.

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The attached budget template represents a conservative and realistic financial roadmap for the proposed school. The budget includes assumptions based on historic costs at the first Intrinsic campus, a carefully developed staffing plan and a realistic facilities solution.

It is important to note that the budget template does not allow for any revenue inflation. As such, we did not inflate salaries or non-personnel expenses. An organization is not viable if expenses grow annually while revenues stay constant. Over the last several years we have experienced periods of flat revenue or years when revenues have decreased. In these years we have maintained static average wages and managed non-personnel expenses to ensure that they were no more expensive than the prior year. In addition, we budget a contingency reserve of 2% of PCTC which has been used to offset mid-year retroactive reductions in revenue.

The proposed school will operate at a slight surplus for each year of operations and will build a modest cash reserve over the course of the five years. If this were a stand-alone school, the minimal cash reserves would be of concern however, the network as a whole has a strong cash position. As of June 30, 2017, Intrinsic Schools had over 141 days cash on hand. As of today, we have over \$8M cash and anticipate that our days cash on hand continue to increase significantly. This is large reserve for a single school and is more than sufficient to meet the needs and contingencies for two schools. As such, the proposed school will use the existing cash reserve to protect itself against lower than expected revenues or unforeseen expenses.

Intrinsic Schools created its model to generate sufficient surpluses to offset a portion of the start-up expenses at new schools. As such, \$1.5M of the Intrinsic School 2 revenue will actually be in the form of a cash draw down from the existing cash reserve. This is shown on Row 23 of the Budget with Assumptions tab.

The five-year budget assumes private fundraising of \$2.3M over the first four years of operations before the school becomes financially sustainable on recurring public revenue. This is an attainable target for Intrinsic as we have a strong fundraising history and a board of directors that is well positioned to assist us in raising the necessary funds. This is described in more detail below.

#### **Major Assumptions**

The budget form provides the opportunity to state most assumptions which therefore are not addressed in this narrative.

#### **Revenue:**

- In addition to the CPS revenue which calculated automatically, we included Supplemental Special Education funds. In FY18, we received more than \$500 per pupil at our existing school in Supplemental Special Education funding. We recognize that funding at this level is not

guaranteed however, this funding is through federal IDEA funds. As with other categorical funds such as Title I and Title II funds, we assume that we will receive our proportionate share of IDEA funds. On average, this is \$226 per pupil which is included in our revenue section.

- Student fees are set at the same level as we use at our existing school.
- We have included \$950,000 over three years for the federal CSP grant that is administered by ISBE. We were successful in obtaining this grant for our first school and anticipate that we will be able to receive this funding for the new school.
- The investment of network cash reserves is explained above.

Expense:

- Salaries are aligned to compensation levels at our existing school as are benefit rates.
- All non-personnel expenses are based on actual experience at our existing campus.
- The budget reflects a leased facility that we will take in three tranches allowing us to only pay for the space needed in years one and two. The rent includes all tenant improvements and all items marked "Included in lease". In the event that we purchase a building for renovation, we will ensure that debt service and operating expenses are in line with the amounts included in this budget. Additionally, we will phase construction to ensure that we do not take on the full cost of the facility in the first two years of operations, in a manner similar to the lease assumptions.
- We consolidate all non-employee insurance on one expense line. In this budget it is on the Liability Insurance line.
- We have set aside 2% of PCTC as an annual contingency. This will provide the school with funds to weather changes in funding or unanticipated expenses. We follow a similar practice at the existing school. In general, we have not needed to utilize the contingency and have instead held it to build a more significant cash reserve.

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**Fundraising Plan:** *What are the organization's fundraising goals over the next five years? Include information about historical fundraising levels and future likelihood of success. Cite any commitments that have already been secured.*

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The budget includes \$2.3M in fundraising during the first four years of operations. We are confident about our ability to raise these funds. Intrinsic's fundraising strategy leverages the experience, energy and relationships of our highly involved Board of Directors, along with the credibility of our founder, Melissa Zaikos, to form partnerships with foundations (local and national) and high-net-worth individuals. We have been highly successful in our prior fundraising efforts. Intrinsic has raised well over \$7M over the last five years from a wide range of local and national philanthropic organizations as well as individuals and board members. It is important to note that our existing school is no longer dependent upon philanthropy for general operations. As such, all fundraising efforts can be focused on launching the new school. Additionally, there are significant philanthropic opportunities for expanding networks that do not exist for fully enrolled schools. We are confident in our ability to raise the funds necessary to grow our new school to capacity.

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**Financial Scalability:** Describe to what extent the addition of a new campus will impact the financial sustainability of existing campuses. How will the network help mitigate any negative financial impact on existing campuses?

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The new campus will have a positive financial impact on the existing school. Currently the existing school covers the expenses of the entire network office. Once this expense is shared with the new school, the existing school will have the opportunity to repurpose some of these funds. It is important to note that we do not expect that the network office expense to scale in proportion to the additional students. The existing school contributes 15% of PCTC toward network office expenses. As the second school grows to scale, this will decrease to 10% of PCTC which is what we have budgeted for Intrinsic 2.

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### **3.4.2: Financial Performance and Oversight**

*Specify whether your school or network is on financial probation or has been on financial probation over the past three years. Describe the circumstances leading to being placed on financial probation.*

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Intrinsic has not met all of the CPS financial standards. Intrinsic owns its current facility which is 100% financed. As such, it is impossible to meet the CPS net asset ratio requirements. CPS recently amended its financial accountability policies as such, we do not expect have further infractions or require corrective action plans.

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*What financial controls does the organization have in place at the central and school level to ensure long-term financial viability?*

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Intrinsic has a robust Financial Policies and Procedures handbook that has been reviewed by our external auditor and is board approved. The handbook establishes systems that will ensure long-term viability at all levels of the organization. The addition of a second school will not require modification of the financial policies and procedures. The handbook contains eight main sections which address:

1. Purchasing
2. Disbursements
3. Cash receipts
4. Payroll
5. Reporting (to management and the board)
6. Bank accounts
7. Capitalization policy
8. Inventory

The Financial Policies and Procedures handbook is available upon request.

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*Outline the organization's short- and long-term financial goals and metrics. What performance management systems and benchmarks will the organization use to track its progress toward financial goals at the board, network, and school level?*

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Intrinsic has five primary financial goals for both the near and long-term:

- Maintain a strong cash reserve and current ratio



- Meet all bond and loan covenants
- Operate solely on recurring public revenue when schools are at full enrollment capacity
- Operate in a financially responsible manner
- Protect public funds

Intrinsic uses a number of management systems, tools and benchmarks to ensure that goals are met. The CEO and CFO review a number of reports on a monthly basis including a full set of financial statements, a cash report and a budget to actual report. Following this review, detailed budget to actual reports and financial statements are provided to the finance committee of the board. Summary reports are provided to the entire board at each board meeting. These reports allow management and the board to monitor cash position, current ratio and loan covenant benchmarks on an ongoing basis. The targets are:

Days cash on hand	60 days
Current ratio	1.2
Debt service coverage ratio	1.1

Annual budgets are prepared by the Director of Finance and Operations and CFO in consultation with the CEO and school principals. Collectively, the team develops a budget that ensures that the school can operate without need for philanthropic funds. This budget is presented to the finance committee of the board for review and modifications are made based on the committee's feedback. The budget is then presented to the entire board for approval.

Multi-year projections are also prepared by the CFO and are used by the CEO, school leadership and finance committee of the board. They are dynamic and allow for testing multiple scenarios. These forecasts serve as a tool to ensure that the schools will remain financially viable despite uncertainty. They are also used to identify areas of the budget that could be reduced in the future should the financial landscape shift.

We protect public funds through our systems of internal controls, financial policies and procedures, board oversight and annual audits.

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*Why does your organization believe it has the financial capacity to add the proposed school(s)?*

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Intrinsic has a strong financial team which has successfully guided the existing school as it has grown from 180 to 1,000 students over the course of the last five years. The board of directors has a strong commitment to financial oversight and provides ongoing guidance as we face financial decisions. The existing team managed several complicated financial transactions including a \$22M bond issue. The team has initiated several departmental transitions in preparation for expansion such as upgrading the accounting software to a robust program that is widely used by medium and large sized companies and non-profits. We have the systems, tools, policies, and procedures that will enable the finance department to scale with ease.