

**CHICAGO**

# **Education Partnership™**

**Tier 1 Proposal  
Moving Everest 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 propose the Austin community for the location of Moving Everest 2. The current Moving Everest school is located in Austin and we have a strong understanding of the community. Over the last several years, we have built a strong presence in the community and have developed meaningful partnerships with many of the local community leaders and organizations. We are committed to Austin and have a deep understanding of the challenges faced by our students, many of whom have experienced significant trauma and struggle with the effects of extreme poverty.

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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.*
- 

#### **Historical Overview**

We are located in the Austin neighborhood of Chicago and the needs of our students are acute and comprehensive. It is an area that is besieged by crime, drugs, gang activity and failing schools. In addition to failing schools, students in the Austin neighborhood face tremendous challenges related to high rates of poverty, crime and gang activities.

The Austin neighborhood was the most violent neighborhood in a terribly violent year in Chicago. There were 92 murders and 445 shootings in the Austin neighborhood alone in 2016. In the 15<sup>th</sup> police district where Austin is located the incidence of crimes in the past year include:

<b>Crime</b>	<b>Number of Incidents</b>
Violent crimes	1509
Property crimes	2225
Public violence	717
Sexual assault	51
Robbery	599
Aggravated assault and battery	804
Burglary	321
Larceny	1375
Vehicle theft	498
Assault	585
Battery	2194
Weapons violation	227
Drug abuse	1258

Trends in Austin are in line with the crime data presented above. Austin has seen significant population decline over the last thirty years. It was once the most populous neighborhood in Chicago however, due to the high crime rates, Austin has seen steady population decline and this is no longer true.

Austin had been a predominately white community through the 1970s but was over 70% African American by 1980. During the 1970s and 1980s there was a divestment from Austin, housing demolition, lack of jobs and the disappearance of commerce. All of these eventually lead to economic decline in the community. Austin income, unemployment and education levels are all significantly worse than the city's as a whole.

**Community Demographics**

According to the Chicago Department of Public Health, key demographics include:

**Ages:**

Ages 0-4	7,331
Ages 5-14	14,369
Ages 15-24	15,934
Ages 25+	60,009

**Ethnicity:**

Non-Hispanic African American or Black	83.0%
Hispanic or Latino	11.4%
Non-Hispanic White	4.5%
Non-Hispanic Asian or Pacific Islander	0.5%

**Level of Education Attainment**

College graduation or more	12.4%
No high school graduation	22.9%



Unemployment rate	19.5%
Poverty Rates	
Child poverty	43.5%
Household poverty	28.6%
Individual poverty	30.6%

The median household income according to the website Statistical Atlas which uses data from the US Census Bureau is \$34,100.

### **Population Trends**

According to the Chicago Department of Public Health, the total population of Austin is 97,643. Austin's population has declined significantly since its peak in 1980 of 138,026. Until recently, Austin was the most populous of Chicago's neighborhoods however as a result of the high levels of violence in the community this is no longer the case.

### **Major Employers**

Major employers include :

- Walmart Supercenter
- Gatto Industrial Platers, Inc.
- Stores at the Washington Square Mall
- Loretto Hospital

### **Local Businesses and Non-Profits**

In addition to the major employers listed above, following many of the most prominent local businesses, non-profits and faith based organizations:

- Greater Austin Development Association of Chicago
- Austin Coming Together
- New Moms
- Vocel
- ACCESS Austin Family Health Center
- SOUTH AUSTIN NEIGHBORHOOD ASSOCIATION
- Cornerstone Counseling Center of Chicago
- Jane Addams Resource Corporation
- Oak Park River Forest Food Pantry
- Institute for Nonviolence Chicago
- Church on the Block
- CENTRAL AUSTIN NEIGHBORHOOD ASSOCIATION
- Chicago First Church of the Nazarene
- Grace and Peace Church
- New Galilee Missionary Baptist Church
- The Friendship Baptist Church of Chicago
- Bethel New Life

- The Peace Corner Youth Center
- Austin Childcare Providers Network
- ABC Bank
- The Austin African American Business Networking Association Inc.

#### **Community Newspapers**

- Austin Weekly News
- The West Cook Journal
- The Austin Voice

#### **Public and Private Schools in the Area**

Austin is geographically large and contains 18 K-8 schools including Moving Everest:

1. Sayre
2. Lovett
3. Lewis
4. Brunson
5. Spencer
6. Catalyst Circle Rock
7. Hay
8. McNair
9. Howe
10. Depriest
11. Leland
12. Clark
13. Plato
14. Nash
15. KIPP
16. Ellington
17. Young
18. Moving Everest

While it may appear as though there is an abundance of schools in the community, the high demand for the current Moving Everest campus is a strong indication that parents are looking for alternative options to what currently exists in the neighborhood. In particular, a school with a different model and a school with a strong after-school partnership that is available to all students free of charge.

### **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.*
- 

Based on our experience in Austin, we anticipate that students be almost 100% African American and 95% of students will qualify for free or reduce price lunch. We anticipate that we will serve a high needs special education population of approximately 13% or the total student population. Based on our experience, we believe that the homeless population will be approximately 5% of the total student population and we do not anticipate that we will serve English language learners.

Students in Austin face tremendous challenges related to high rates of poverty, crime and gang activities. As we have learned, students in under-resourced neighborhoods often enter school with multiple barriers to learning;

- They routinely lack a safe and secure environment
- They are subject to a one-sized fits all education
- Their schools often function with a very inefficient time/schedule structure
- Their schools lack any effective social/emotional/physical supports
- There is a distinct lack of rigor
- Parents are viewed as intrusions to the school resulting in low parental involvement.

These hurdles prevent children from achieving meaningful academic results, deter a genuine love for reading, inhibit healthy physical/emotional development and counteract deep character and values growth.

On average, our students begin our school 1.5 years behind grade level academically. They are also lacking in social, emotional, and physical areas that which are necessary for a healthy track to a successful school experience or even a successful life.

### **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.*

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#### **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.*

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“The big architectural implication of competency-based education is the need for more big flexible space and less need for the basic building block of educational architecture—the 900 square foot classroom.”  
Alex Hernandez, Charter School Growth Fund

Chicago Education Partnership has worked with By The Hand Club For Kids and their architects to design a facility to support a high-quality learning environment and the explicit mission and goals of the new school. The new facility has larger, more flexible classrooms to accommodate simultaneous small group instruction, computers, areas for reading and the shared space requirements for the after-school program. There are small breakout rooms for tutoring and special education classes, as well as larger computer labs for technology-based learning. Also conducive to learning is a joyful, peaceful and bright environment that comes from the use of natural and artificial lighting, spacious common areas and intimate settings for reading. Amenities include a gymnasium/cafeteria, commercial kitchen and 260-seat auditorium. The building was designed to be safe and secure and meets all accessibility guidelines and applicable building codes.

Breakdown of Spaces:

#### Classrooms:

Kindergarten Class (1) with toilet & closet: 1,135sf

Kindergarten Class (2) with toilet & closet: 1,135sf

Kindergarten Class (3) with toilet & closet: 1,135sf

1<sup>st</sup> Grade Class w/ closet (1): 1,125sf

1<sup>st</sup> Grade Class w/ closet (2): 1,125sf

1<sup>st</sup> Grade Class w/ closet (3): 1,125sf

2<sup>nd</sup> Grade Class w/ closet (1): 1,125sf

2<sup>nd</sup> Grade Class w/ closet (2): 1,125sf

2<sup>nd</sup> Grade Class w/ closet (3): 1,125sf

3<sup>rd</sup> Grade Class w/ closet (1): 1,125sf

3<sup>rd</sup> Grade Class w/ closet (2): 1,125sf

3<sup>rd</sup> Grade Class w/ closet (3): 1,125sf

4<sup>th</sup> Grade Class w/ closet (1): 1,125sf

4<sup>th</sup> Grade Class w/ closet (2): 1,125sf

4<sup>th</sup> Grade Class w/ closet (3): 1,125sf

5<sup>th</sup> Grade Class w/ closet (1): 1,125sf

5<sup>th</sup> Grade Class w/ closet (2): 1,125sf





5<sup>th</sup> Grade Class w/ closet (3): 1,125sf  
6<sup>th</sup> Grade Class w/ closet (1): 1,125sf  
6<sup>th</sup> Grade Class w/ closet (2): 1,125sf  
6<sup>th</sup> Grade Class w/ closet (3): 1,125sf  
7<sup>th</sup> Grade Class w/ closet (1): 1,080sf  
7<sup>th</sup> Grade Class w/ closet (2): 1,080sf  
7<sup>th</sup> Grade Class w/ closet (3): 1,080sf  
8<sup>th</sup> Grade Class w/ closet (1): 1,080sf  
8<sup>th</sup> Grade Class w/ closet (2): 1,080sf  
8<sup>th</sup> Grade Class w/ closet (3): 1,080sf

Breakout Rooms:

Breakout (1): 350sf  
Breakout (2): 360sf  
Breakout (3): 360sf  
Breakout (4): 370sf  
Breakout (5): 390sf  
Breakout (6): 420sf  
Breakout (7): 300sf  
Breakout (8): 225sf

Computer Labs:

Computer Lab (1): 955sf  
Computer Lab (2): 1,370sf  
Computer Lab (3): 1,410sf  
Computer Lab (4): 1,000sf

Special Education:

Special Ed Suite: 530sf

Amenities:

Auditorium w/ storage: 3,325sf  
Gymnasium / Dining w/ storage: 7,300sf  
Kitchen w/ storage: 480sf

Administrative:

Reception Area: 165sf  
Sick Room: 85sf  
Principal's Office: 190sf  
Staff Work Area, Conference Rm: 1,600sf  
Additional Office / Nurse Suite: 630sf

Lobby & Circulation:

Entry Vestibule (1): 250sf  
Entry Vestibule (2): 120sf  
Lobby (1): 1,430sf  
Lobby (2): 1,260sf



General Circulation (Hallways): 10,600sf

General Circulation (Stairs): 1,980sf

Restrooms:

1<sup>st</sup> Floor Staff WC (1): 50sf

1<sup>st</sup> Floor Staff WC (2): 50sf

1<sup>st</sup> Floor Men's Restroom (1): 170sf

1<sup>st</sup> Floor Men's Restroom (2): 180sf

1<sup>st</sup> Floor Women's Restroom (1): 170sf

1<sup>st</sup> Floor Women's Restroom (2): 180sf

2<sup>nd</sup> Floor Unisex WC: 55sf (existing)

2<sup>nd</sup> Floor Men's Restroom (1): 190sf

2<sup>nd</sup> Floor Men's Restroom (2): 200sf

2<sup>nd</sup> Floor Women's Restroom (1): 190sf

2<sup>nd</sup> Floor Women's Restroom (2): 170sf

3<sup>rd</sup> Floor Men's Restroom (1): 220sf

3<sup>rd</sup> Floor Women's Restroom (1): 220sf

Utility:

Fire Pump Rm (1): 100sf

Fire Pump Rm (2): 140sf

Electrical Rm (1): 110sf

Electrical Rm (2): 100sf

Tech Closet: 50sf

Trash Room: 230sf

1<sup>st</sup> Floor Janitor Closet: 130sf

2<sup>nd</sup> Floor Janitor Closet: 65sf

Storage (dispersed through building): 530sf

**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**

The mission of Moving Everest Charter School is to create a school that dramatically transforms the lives of K-8 students and prepares them for success in college and in life through: the delivery of a rigorous and personalized academic program, a focus on holistic education and the development of strong character.

Because we believe that maximum impact in an individual's life can most effectively be achieved through the determined efforts of a myriad of influencers, our vision is to prepare students for academic success, develop proficient and enthusiastic readers and to provide comprehensive, holistic services to students in partnership with a strong after-school provider.

Students in under-resourced neighborhoods often enter school with multiple barriers to learning that prevent them from achieving meaningful academic results, deter a genuine love for reading, inhibit healthy physical and emotional development and counteract deep character and value growth. We desire to reduce and eliminate those barriers to learning and to a successful life. We will utilize what we have learned about children and families in challenging Chicago neighborhoods and apply our educational experience into a holistic partnership service model that serves kids throughout the entire school day and through the after-school hours. Considering the numerous challenges that many students face, we believe that stand-alone education interventions are not sufficient to prepare them for success in college and in life.

#### **Vision**

Our vision is to create generational change in its students and families by successfully addressing the needs of the whole child; academic, social, emotional, and physical. We cultivate a passion for learning in students living in one of the most violent neighborhoods of Chicago by providing a highly personalized, safe and secure environment in which students feel loved and cared for while simultaneously being challenged to grow in all areas of their lives, both academic and non-academic. The acute needs of our students can best be addressed through a high quality, rigorous, and character/values infused education. Moving Everest is committed to providing comprehensive support

to ensure that a child can see amazing academic and personal success that will change the course of their life for good.

Our vision is to provide the Austin neighborhood of Chicago with a robust elementary school that prepares students to enter and excel in a college preparatory high school. Putting our future eighth grade students in a position to select from their top three high school choices, and not merely be relegated to their neighborhood school based on geography, is one of our primary goals. To do this, we will need to grow our students academically at a rate faster than simply a grade a year. But at the same time, we do not want to minimize our desire to see their growth in character and our core values (curiosity, perseverance (grit, hard work and persistence), respect, self-control, self-confidence, courage and a growth mindset) that will surely help them be successful throughout school and in life. We believe that a great faculty and staff, focused mission, Core Knowledge curriculum, personalized approach to instruction, training in core values, and a holistic service model will combine to provide students with a transformative experience that focuses on developing their academic skills while helping them to develop strong character, healthy lifestyles, and love for learning.

### **Curriculum**

The base curriculum used by Moving Everest is Core Knowledge. This was chosen specifically because it is academically excellent, promotes fairness, develops literacy, and provides a specific, shared core curriculum that allows children to establish strong foundations of sequenced knowledge. Core Knowledge identifies specific and lasting knowledge that builds upon the premise that knowledge builds on knowledge. Children learn new knowledge by building on what they already know and by using Core Knowledge, our school clearly defines the specific knowledge and skills required to be literate at each grade level and ultimately in society. This sequential building of knowledge not only helps ensure that children enter each new grade ready to learn, but also helps prevent the many repetitions and gaps that characterize much of current education. This knowledge is also shared knowledge. To be literate means, in part, to be familiar with a broad range of knowledge taken for granted by society. A Core Knowledge curriculum provides all children, regardless of background, with the shared knowledge. This is supplemented by numerous online, traditional and teacher developed sources.

### **Educational Philosophy and Instructional Approach**

Many schools are designed with a factory model, built for an agrarian economy. At Moving Everest, we use many traditional ideas while also reflecting the needs of the modern workplace in its increasingly collaborative, technologically innovative, and culturally diverse nature. We also realize the importance of instilling in our students' personal qualities such as grit and perseverance along with character growth and community building. We set the stage for a dynamic learning experience where students work together to engage in learning, creativity, and problem solving; helping students see a path out of poverty by giving them a supportive educational experience. The Moving Everest student experience is driven by the three pillars of our school design:

- Personalization
- Character Development
- Partnership

### **Personalization**

Moving Everest will provide students with a student-centered and individualized learning program. A major component of our efforts to both personalize the education of students and to help them grow in



their responsibility for and ownership of their own education is found in WIN Time. WIN Time (**What I Need**) is the first hour of every day and will provide a dedicated time for students to build strong, meaningful relationships with one primary adult and a small group of peers. WIN will focus on both social and emotional learning, developing habits of mind, and academic learning and practice.

WIN time is how scholars and staff start their day at Moving Everest. During WIN time, scholars participate in a Responsive Classroom Morning Meeting which allows for a strong community to be built within the room. In addition, students will participate in character building activities on a continuous basis focused around the Moving Everest core values; Curiosity, Perseverance, Respect, Self-Control, Self-Confidence, Courage, and Growth Mindset. Three days a week during WIN time, scholars participate in Family Time which is our social emotional learning time using Pearson SSIS SEL. WIN time is also used to supplement instruction around core math and literacy skills such as phonics, phonemic awareness, read aloud, calendar time, and other skills based on scholars and class data.

The Moving Everest school design also utilizes technology to foster personalization. During a 90-minute humanities block and a 90-minute STEM block, students will rotate through three activities: direct instruction, targeted small group learning and individualized computer instruction. At a minimum, students will spend 60 minutes per day working independently in the computer lab setting. During the computer instruction, students will utilize programs such as ST Math and Lexia that are Common Core aligned, adapt to their individual needs and promote progress at an optimal pace. Through technology, students will have the opportunity to accelerate or remediate based on their individual mastery of the skills and content. The information gained through the utilization of technology also influences the make-up of the flexible small groupings.

### **Character Development**

Moving Everest students will participate in character building activities on a continuous basis. The school's core values are based, in part, on the work of Carol Dweck and Paul Tough and include:

- Curiosity
- Perseverance (grit, hard work and persistence)
- Respect and self-control
- Self-confidence
- Courage and a growth mindset

Moving Everest will provide explicit instruction in these areas through the weekly character development class and will utilize weekly all school assemblies to further embed the core values into the school's cultural norms.

### **Partnership**

Partnerships are a cornerstone to our success at Moving Everest. Students will benefit from a strong and engaged community. First and foremost, we firmly believe that parent engagement is a critical component to student academic and personal growth and achievement. In addition, students will benefit greatly from our partnership with an after-school provider that effectively extends the learning that takes place during the school hours. The currently designated after-school provider is By The Hand Club For Kids (BTH), however, we will provide parents with information related to other local afterschool providers should they desire.



The relationship with BTH is supplemental to the robust services offered by Moving Everest during the school day. BTH will provide after-school services to Moving Everest students, whose parents have chosen to enroll them, to further their social, emotional and academic development. Should parents choose this option for their children, Moving Everest students will experience a transitional period at the end of the school day that marks the end of the school day and the beginning of after-school programming. There will be opportunities for the school to collaborate with BTH in a variety of ways just as they do with the sixteen CPS schools that currently partner with BTH.

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

Our model non-negotiables and comprehensive educational philosophy is embodied in our ten core principles:

- Student-centered, personalized learning.
- Culture of high expectations.
- Self-pacing and mastery-based instruction.
- Blended instructional model.
- Data-driven instruction.
- Student ownership.
- Focus on reading.
- Character development.
- Social and emotional needs.
- Partnership with an afterschool provider.

### **Culture**

Moving Everest Charter School is dedicated to creating a joyful school environment that is conducive to learning, which fosters personal growth and character development, and ensures the safety and well-being of all students and staff. Moving Everest considers the climate the heart and foundation of the school and will endeavor to establish a positive school culture that is pervasive throughout the school and carries over into the after-school program. This cultural coordination between the school/after-school will be directed and overseen by the principal and executive director in collaboration with the BTH site director. It is anticipated that the leadership of the two entities will meet on a regular basis to continually review all aspects of the partnership to ensure that there is fidelity to the MOU that is in place and that all laws are being followed.

The combination of our teacher training, coaching, and development, character infused Core Knowledge curriculum, and strong after-school partnership, produce students that learn to be curious, persistent, respectful, confident and academically strong. All of this begins with the personalized approach we take to teacher development and student learning.

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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.*
- 

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.*

---

CEP is not applying to open any locations outside of Chicago. CEP 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.*

---

Chicago Education Partnership established Moving Everest with the idea that a we would provide the students of Austin with a unique and transformative experience that focuses on developing their academic skills while helping them develop strong character and love for learning. We created the school with the vision providing students with a comprehensive continuum of service from 7:30am – 6:30pm and through a partnership with a robust and proven afterschool program, By The Hand Club For Kids. Through this partnership, we are able to create a synergistic and cohesive program that meets students’ academic, social and emotional needs.



Since envisioning the creation of Moving Everest, we have always anticipated that we would replicate the model in Chicago. In fact, when we created and implemented the Moving Everest staffing plan, we did so with the assumption that we would open a second school. Creating both a principal and executive director role is unusual for a brand new school but we did so to ensure that we would have the capacity and depth of experience to launch our second school. Michael Rogers, executive director has been instrumental in developing and implementing the Moving Everest program over the last three years in preparation for managing the principals of both the existing and the proposed school.

It is our hope not only to serve more students, but to demonstrate the immense potential for innovative school programs to work synergistically with afterschool programs to provide students with an integrated approach to a holistic education.

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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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We are currently seeking to open one additional school however, it is our assumption that when the first and second schools demonstrate ongoing success, we will consider applying to open additional campuses. Over time we may entertain additional growth but at the moment we need to first make certain that we can successfully replicate our existing school. We will re-evaluate our growth plan over the next three to five years as we demonstrate success of school two.

We have intentionally waited three years to submit an application for growth with a target of expansion after our fourth year of operation. We feel strongly that this represents an appropriate period for the organizational leadership and board to determine our capacity to grow. The metrics used by our management and the board to determine readiness for growth are found in the following questions:

#### **Academic Development**

Have our students demonstrated strong academic growth?

We assess this through:

- NWEA MAP
- STEP assessment
- Internal summative assessments
- PARCC (starting with third grade)

#### **Character Development**

Are students demonstrating progress in our five areas of character development?

- Curiosity
- Perseverance
- Respect and Self-Control
- Self-Confidence
- Courage and the Growth Mindset

### **Financial**

Are we operating in a financially responsible manner? And are we meeting our fundraising targets?

We assess this through three primary measures:

- Days cash on hand
- Current ratio
- Net asset ratio
- Annual fundraising targets established in our operating budget

### **Organizational**

Do we have strong teacher and student retention?

Do we have strong student demand?

### **Greenlighting**

Our greenlighting criteria are based on metrics identified above as well as two additional criteria, identification of a school leader and identification of a suitable facility. The combination of these measures form the basis upon which our board and leadership assess our capacity for growth. Prior to launching a new school, we have identified the following seven greenlighting requirements. In the event that we fail to meet these requirements, our board and management will reassess our ability to successfully launch a new school.

#### 1. Academic Success

We have established strong growth and attainment measures that guide our us in our greenlighting process. The detailed academic attainment and growth targets are found in response to **3.2.3:**

**Oversight of Academic Performance.** However, as a guide, we have set an SQRP target of 1 or 1+ as an indicator for readiness for replication.

#### 2. Student Character Growth

To replicate it is essential to us that students demonstrate strong character growth. We use a school wide behavior management system that is tracked through LiveSchool - a customizable web based program. Through LoveSchool, students earn positive and negative points in a number of areas including our four school-wide rules: safe, respectful, responsible, be a leader, and our core values: curiosity, perseverance, respect, self control, self confidence, courage, growth mindset. We collect data across all areas for each student and for the school as a whole. Prior to replication, we will assess the school-wide positive and negative points for the preceding semester. We have set a minimum of 12 positive points to every one negative point as our standard for replication.

#### 3. Financial Ability to Replicate

To replicate we focus on two areas. First and foremost, we must ensure that we have a minimum of 45 days cash on hand to ensure that we are well shielded from unanticipated shifts in revenue or unbudgeted expenses. Second, we must have identified philanthropic, grant and federal targets to offset a minimum of 40% of the total fundraising needed for the first three years of new school operations. The combination of these two measures will ensure that we are financially able to replicate.

#### 4. Evidence of Strong Student Demand and Retention

We will measure enrollment demand at our existing campus as an indication of our ability to generate sufficient demand at our new campus. As decisions related to expansion must be made prior to holding

our lottery in the spring prior to opening, we cannot base our enrollment demand greenlighting criteria on the new school. As such we will look to have a minimum of 1.5 applicants for each open seat at the existing Moving Everest school as a core component of our greenlighting process.

5. Evidence of Strong Teacher Retention

Ideally below 30% but no more than 33% teacher turnover in the prior school year.

6. Identification of a School Leader

We will not replicate unless we have identified a school leader a minimum of six months prior to school opening. We believe that the incoming school leader will need this time to accomplish four distinct goals:

- Develop a meaningful and deep relationship with the community including parents, students, community partners, community leaders, and local businesses and non-profits.
- Learn the Chicago Education Partnership model, spending a significant amount of time in Moving Everest to gain a deep understanding of our unique model.
- Working with our afterschool partner to establish how the school and afterschool programs will be seamlessly integrated to provide students with a cohesive continuum of service from 7:30 am – 6:30 pm (for those students who elect to participate in the afterschool program).
- Hire staff and prepare the school for opening in the fall.

7. Identification of a Suitable Facility

We believe that we must identify a suitable facility nine months prior to opening the school. We were able to construct our current school building in this timeframe. As such, this is the minimum amount of time that we believe that we will need to construct a new building. It is important to note that we anticipate phasing construction. As such, we will only need a fraction of the facility upon opening.

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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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As Chicago Education Partnership is growing from one to two schools, it will create a small network office to ensure that both schools receive the same quality of service and that the operations adapt as the schools and students are added. To this end, we will centralize the following positions:

- Executive Director, Michael Rogers
- Director of Operations and Compliance, Lakeshia Hayes
- Director of Diverse Learners, Kristen Soroko
- Director of Social and Emotional Learning, Laura Elk
- Director of Technology, Brad Ritchie

The creation of this small central office will not negatively impact the operations of the existing school. The Director of Social and Emotional Learning and the Director of Technology are new positions. The Director of Diverse Learners will be replaced by a case manager at the existing school and the Executive Director and Director of Operations and Compliance have capacity to meet the needs of both schools.

We anticipate adding a manager of operations and compliance as well as an administrative assistant as Moving Everest 2 enters its third year of operations.

As the new school will mirror the existing school, we do not anticipate any model changes. We will continue to develop tools and systems as we have done through our first three years of operations which will further ensure that both schools receive the high quality of services that we expect of ourselves and our schools. Examples of this might include:

- Codification of professional development plans
- Procurement systems
- Creation of new policies to support social and emotional growth
- Further integration of best practices in all areas of operations
- Stronger practices related to data driven instruction
- Better tools for staff to implement strong, compliant practices related to diverse learners

With a strong team in place we are excited about creating the central office to streamline practices and improve services for both schools. As we have seen across the country, the creation of a central office provides tremendous opportunity to become more sophisticated in the programmatic and operational aspects of running a high-quality charter school.

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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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In an attempt to anticipate potential risks and develop mitigating strategies, we have made significant efforts to understand the challenges of replication from other charter school operators. Based on their experiences and our programmatic priorities, we believe that the greatest risks for implementing a high quality growth plan are:

- Replicating with fidelity
- Maintaining high levels of academic achievement
- Enrolling sufficient students
- Ensuring that a high quality facility will be identified and open on time
- Meeting fundraising needs
- Identifying a high quality school leader

### **Replicating with Fidelity**

Perhaps the greatest risk to growth is the failure to replicate a school program with fidelity. As we've seen across the country, when the intent for replication is minimal variability, fidelity to the core program is critical for success. Every aspect of Chicago Education Partnership's model is built upon its core values and cultural norms. We believe that if we successfully align all staff across both campuses around our cultural norms, we will be well positioned to replicate the program with fidelity.

The Moving Everest Charter School's professional culture will mirror the school culture and be grounded in our cultural beliefs as well as our core values:

### **Cultural Beliefs**

1. The school will be a physically and emotionally safe and secure environment
2. We will place a strong emphasis on character development
3. We will measure and celebrate success
4. The school culture will focus on reading

### **Core Values**

- Curiosity
- Perseverance
- Respect and self-control
- Self-confidence
- Courage and a growth mindset.

We will be purposeful in the selection of teachers to identify those who embrace our beliefs and demonstrate our core values. In addition, we will dedicate a significant portion of our summer institute and ongoing professional development to developing and maintaining the school culture for adults and students. Section 3.2.1 includes a table that provides additional detail regarding our cultural norms.

### **High-Levels of Academic Achievement**

At Chicago Education Partnership, we will measure student progress on a continuous basis through a wide variety of formative assessment tools and techniques. Formative assessment is a process used by teachers and students during instruction that provides feedback to students so that both students and teachers may adjust ongoing teaching and learning to improve student achievement of intended instructional outcomes. Following best practice, our formative assessment will incorporate the following components:

- The identification by teachers & learners of learning goals, intentions or outcomes and criteria for achieving goals.
- Conversations and questions between teachers & students that continually expand and deepen.
- Effective, timely feedback to enable students to advance their learning.
- The active involvement of students in their own learning.
- Modification by teachers of their teaching approach.
- Not usually graded
- Process oriented
- Descriptive feedback loop
- Continuous improvement emphasized
- Informal
- Interactive

To effectively conduct ongoing formative assessment, we will employ the following tools and methodologies:

- Questions to challenge students to demonstrate higher level thinking
- Classroom discussions which allow teachers to record student responses
- Informal feedback and conferences to discuss targeted skills
- Student self-assessment to allow students to reflect on their learning
- Exit/Admit Slips to be used on a daily basis to assess mastery of daily goals
- Graphic Organizers that allow students to demonstrate their knowledge on a specific standard

- Practice presentations that demonstrate knowledge on a specific set of standards
- Kinesthetic Assessments to allow students to demonstrate their understanding through movement

In addition to ongoing formative assessment, we will utilize the NWEA MAP test three times a year at all grade levels to provide teachers and administrators with nationally normed data that measures student growth. Assessment data will be reviewed weekly in our professional learning communities. This PLC model will enable the review of both formative and summative assessment data and allow our faculty to utilize this data to drive instructional decision making. In PLCs, teachers respond to data that require mutual accountability and modifying classroom practices as necessary.

Moving Everest will follow the four key areas of focus for implementation of data driven instruction that are outlined in Paul Bambrick-Santoyo's book, *Driven by Data: A Practical Guide to Improve Instruction: assessment, analysis, action and a data-driven culture.*

### **Assessment**

Moving Everest Charter School will create its own internal interim assessment, which will be administered every six weeks. Moving Everest will also use the NWEA MAP test three times per year to measure student growth.

### **Analysis**

Following each interim assessment, we have scheduled a data professional development day dedicated to assessment analysis. Moving Everest Charter School will use the North Star Academy template to analyze data at a student level for interim assessments. Data analysis will take place in teams, individually, and in one-on-one administrative meetings. The variety of analysis is as follows:

- Grade level analysis in professional development
- Grade level analysis in team meetings
- Individual student level analysis
- 1 on 1 data meeting with member of the leadership team
- Test in hand analysis facilitated by a member of the leadership team

When looking at student data, it is crucial to drill down to the student and question level to ensure we have a full understanding of student mastery. The North Star Academy template allows us to do this while creating a plan of action based on our findings. We will analyze data in a variety of settings in order to get practice and build capacity in the process. Moving Everest Charter School knows that this is a process of development, and analyzing with peers and administration will allow for growth and support.

For NWEA Growth Assessments we will use reading and math analysis. These analysis tools will focus on growth and action planning for students who are not making adequate growth in specific subject areas.

### **Action**

Immediately following data analysis, teachers will develop action plans that are based on the data analysis. Teachers will re-teach concepts and skills to students who did not master the content. Re-teaching will occur through whole class, small group, or one-on-one instruction depending on the results

of the data. Re-teaching will be monitored through classroom observations, lesson plan review, and follow up assessments.

Whenever re-teaching occurs, it will be crucial for students to know why it is occurring. Whenever a reteach occurs at Moving Everest, students must be informed of:

- Performance on the standard as a class
- Performance on the standard individually
- How far they were from their proficiency goal
- What actions the teacher will take to get them to proficiency
- What actions they will take to get themselves to proficiency

Students will also use their assessment information to set goals. Students will use the student goal-setting worksheet generated by NWEA to set specific growth goals. For interim assessments, students will use a separate goal-setting form to choose specific standards to target for the next quarter.

### **Difficulty Meeting Enrollment Targets**

A school's financial wellbeing is dependent upon meeting enrollment targets and integrating well within the community. To this end, Moving Everest has been highly successful in its first three years of operations. However, we do not take it for granted that we will automatically be able to meet the enrollment targets for our proposed school.

Moving Everest has developed deep roots in the Austin community and have strong ties to families, community members, elected officials, faith based leaders, community leaders, other community non-profits, local businesses, and other partners. This will provide us with a strong base of support as we launch our enrollment efforts. In addition, we will engage in many of the activities that we found to be highly successful at our first school. We will:

- Create a strong presence on the ground through:
  - Stop and chats
  - Attending block club meetings
  - Attending other existing community events
  - Canvassing the neighborhood
  - Door to door outreach
- Host community meetings
- Meet with groups of local parents
- Distribute flyers, brochures, or other marketing materials to residents, community organizations, and/or businesses
- Place advertisements in neighborhood newsletters or other media outlets;

In addition, over the next 12 months, we will collect intent to enroll forms from potential applicants. We have found that this is a critical activity to ensure a strong base from which to enroll our first classes at the new school.

### **Facilities Risks**

While we recognize that facilities are a significant area of risk for charter school applicants, Moving Everest is fortunate to be able to partner with By The Hand Club For Kids (BTH), a faith based afterschool

program. BTH developed and financed our current facility and rents it to the school for \$750 per pupil which it will do for the second facility as well. This rent is far below what most Chicago charter school pay for their facilities due to the synergies of using the facility as a school during the school day and an afterschool program once school is closed. Effectively the cost savings associated with operating two programs in a single facility allows makes it much less expensive for both parties. This arrangement has been so financially successful that BTH has agreed to finance and develop the facility for the second school as well. This eliminates the vast majority of the facility risk. As we move through the process, we will work in partnership with BTH to identify an appropriate site for development.

### **Fundraising Risk**

Fundraising represents a risk to successful school launches. Unlike many new charter schools, we are not heavily dependent on philanthropic revenue to open and scale Moving Everest 2. We will only need to raise \$700,000 over the course of the first four years. We have a strong fundraising history and a board of directors that has raised tens of millions of dollars for a myriad of organizations. In the unlikely event that we are unable to raise these funds, we will reexamine the budget to identify areas of savings. If we are unable to identify sufficient savings we would need to consider delaying the launch of the school.

### **Identifying High Quality School Leaders and Teachers**

The success of Moving Everest 2 is dependent on identifying and hiring high quality leaders and teachers. To this end we have dedicated significant time to determining the key characteristics of school leaders. We have had conversations with teachers, school administrators and outside groups about the most critical qualities for a school leader in a Moving Everest school. This has facilitated our search and we have already been interviewing several strong candidates. We believe that between the candidates that we have already sourced, our professional networks and our numerous job postings that we will have a school leader identified in advance of the school's approval in December.

As discussed in response to section 3.3.4: Human Capital, we believe that we are well positioned to hire and retain a high-quality teaching staff. We have been successful to date and have learned a tremendous amount about identifying and hiring teachers who will succeed with our population and in our unique teaching environment.

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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?*
-





Chicago Education Partnership was founded by board members and leadership who firmly believe that “we are never as good as we can be”. We are an organization that approaches each success trying to determine what can be done next time to surpass each accomplishment. Our approach is that we are always in continuous improvement mode for everything we do. We are never satisfied with where we are and never think that we have it completely “figured out.”

We have identified three primary areas of focus for current improvement efforts:

- Reading and literacy
- Developing a more personalized approach to learning
- Supporting students with trauma

### **Reading and Literacy**

We determined that we needed to renew our efforts to improve student reading and literacy through a number of measures:

- STEP and NWEA MAP results
- Formative assessments
- Teacher observation and feedback
- External consultant evaluations

To address this challenge, we have elevated two staff members to co-Directors of Instruction. They will focus their time on elevating the overall level of academics in our school and specifically reading and literacy. They are evaluating our current curriculum, assessments, small group structure, traditional and online learning, teacher instructional strategies, our coaching model. They will be working directly with teachers on lesson and unit development and planning and provide lesson plan feedback. In addition, they will engage in assessment planning and development with teachers. The co-Directors will also elevate our teacher accountability (tracking workflow, following up on missed deadlines with direct supervising admin team member, etc.). Other areas of focus include engaging in data analysis with teachers, assisting teachers with identifying how to create the best small groups, leading academic professional development, and ensuring fidelity of programming across all classrooms.

This effort is being led by the executive director. This is the highest priority for our school and the executive director is taking the necessary actions to drive academic achievement and improve reading and literacy across the school.

We anticipate that we will see results of these efforts over the summer and during the upcoming school year. We do not believe that the addition of a new school will impact this challenge.

### **Developing a More Personalized Approach to Learning**

We are focusing on this area because we continually examine our practices to determine what is working well, what is partially working, and what is not working. This is a core component of our model and we believe that it deserves ongoing attention. We are exploring how to develop a more personalized experience for our students in the classrooms and in the computer lab settings. We are seeing a wide range of abilities in our students and we want to have greater opportunities for them to have individualized pathways to achieve mastery at a pace that is most appropriate for them.

We have found that there is not enough actionable information on students, not enough action on the information, not enough diversity in programming, and not enough challenge for high achievers. This problem is greatest in the blended component of our program. To this end, we are hiring a director of technology education and personalization. This individual will:

- Participate in the development of an innovative vision for educational technology aligned with the mission and curriculum of the school and in concert with our AP, Directors of Instruction, and Director of Special Education
- Work directly with teachers to help them develop their technology skills and lead professional development with a goal of increasing the level of personalization for students
- Work directly with teachers to help them understand online learning data and to better understand how to use the data to gauge student progress and develop small group placements
- Work directly with Co-Directors of Instruction to align traditional and online learning
- Provide hands on leadership for staff and students for all software programs (Lexia, ST Math, MyOn, Reading Eggs, STEP, NWEA MAP, iXL and others)
- Create, lead and teach a coding program
- Supervise and lead three computer labs and two additional lab teachers.
- Support data management needs for student-facing and teacher-facing software programs and assessment services, as needed
- Create and develop enrichment classes that expand personalized learning programming
- Create system for tracking personalized learning plans/data

This effort is being led by the executive director. He is committed to helping students to fully engage in their own learning, become excited about school, and think critically. He is working with the principal to develop strategies but is directly leading the effort.

We anticipate that we will see results of these efforts over the summer and during the upcoming school year. We do not believe that the addition of a new school will impact this challenge.

### **Supporting Students with Trauma**

The prevalence of trauma at Moving Everest is overwhelming. Many students come to school each day having experienced traumatic events that impact their relationships, behavior and learning. Studies now show that nearly every school has children who have been exposed to overwhelming experiences. The Adverse Childhood Experiences (ACE) study lists seven categories of adverse childhood experiences including witnessing violence between a child's caretakers, being the direct targets of physical, sexual or psychological abuse, living with a parent with mental illness, substance abuse or involvement in criminal behavior. When we include children who are chronically bullied, live with homelessness, or in the proximity of pervasive community violence, are shuttled around the foster care system or live with a parent traumatized by combat, these studies demonstrate that adverse experiences are more pervasive than many educators currently recognize.

We have seen first-hand that traumatic experiences can impact learning, behavior and relationships at school. Recent neurobiological, epigenetics, and psychological studies have shown that traumatic experiences in childhood can diminish concentration, memory, and the organizational and language

abilities children need to succeed in school. For some children, this can lead to problems with academic performance, inappropriate behavior in the classroom, and difficulty forming relationships. We are seeing all of this in a significant number of our students.

We are addressing these challenges by working to make Moving Everest a trauma sensitive school (TSS). Trauma-sensitive schools help children feel safe to learn. Once schools understand the educational impacts of trauma, they can become safe, supportive environments where students make the positive connections with adults and peers they might otherwise push away, calm their emotions so they can focus and behave appropriately, and feel confident enough to advance their learning. Trauma sensitivity will look different at each school. However, a shared definition of what it means to be a trauma-sensitive school can bring educators, parents, and policymakers together around a common vision. A trauma-sensitive school is one in which all students feel safe, welcomed and supported and where addressing trauma's impact on learning on a school-wide basis is at the center of its educational mission.

Our social worker is taking the lead in helping us to become a trauma sensitive school. She is:

- Attending a train the trainer course for trauma sensitive schools which will lead to a certification
- Leading and overseeing a TSS school committee which evaluates existing school structures and determines needs
- Leading TSS and behavior professional development
- Researching and implementing evidence-based, small group interventions targeting students exposed to trauma

Along with the social worker, the executive director is leading this effort. This critical area of improvement requires the organizational leader to spearhead the effort and the social worker to implement it.

We anticipate that we will see results of these efforts over the summer and during the upcoming school year. We do not believe that the addition of a new school will impact this challenge.

## **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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As we developed the design of our first school, we identified ten core principles which have served as the foundational philosophy for our educational model. These have not changed over the course of the last three years of operations and represent our key non-negotiables. While these were listed in section 3.1.1 we are providing additional detail regarding each of the principles in this section. Following the description of these non-negotiables is an explanation of the processes that we have already and plan to put in place to ensure that our new school implements this educational model with fidelity.

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

Our comprehensive educational philosophy is embodied in our ten core principles:

- **Student-centered, personalized learning.** We will carefully analyze where each student is academically, socially, emotionally, and work to provide a learning environment, academic plan, and support services that meet the needs of students on an individual basis.
- **Culture of high expectations.** We will set high academic standards that are consistent with a future of a successful college experience for all our students. We will challenge them to be their best. Teachers will also hold students to high behavioral standards, which are consistent throughout the school. The result is a respectful and orderly environment in which students can focus on learning and teachers can focus on teaching.
- **Self-pacing and mastery-based instruction.** Moving Everest teachers will utilize technology to enhance the ability of students to accelerate their learning where appropriate and to receive additional support as needed, moving forward when competency and mastery are achieved. We will provide tiered interventions including small-group and one-on-one tutoring for students who need extra attention in order to reach mastery.
- **Blended instructional model.** We will implement a blended model that utilizes technology-assisted instruction to provide: an opportunity for acceleration or remediation, enhanced student data, and feedback on student progress.
- **Data-driven instruction.** Moving Everest will be a data-driven environment where teachers will utilize student assessment feedback and data (such as NWEA MAP, teacher developed assessments, and data from our online content providers) on a continual basis to drive and personalize instructional decisions.
- **Student ownership.** We will create an environment which empowers students with the skills, information and tools they need to manage their own learning, assisting them in becoming intrinsically motivated to grow and experience success.

- **Focus on reading.** A critical factor in determining success in school is a child's ability to read. Our curriculum will include an intensive reading program that will build strong, confident readers who love to read and pursue reading independently outside of school. Extensive professional development for our teachers on techniques which have proven to be effective in promoting reading skills among low-income students and early and frequent assessments to identify students in need of extra assistance will be utilized.
- **Character development.** A consistent program of character development will be incorporated in the school. Virtues such as: wisdom, respect, gratitude, self-control, perseverance, courage, encouragement, compassion, and integrity will be taught. School uniforms, clear and consistent discipline and merit systems, daily routines and rituals, and school-wide academic support help ensure a structured environment that supports character development.
- **Social and emotional needs.** Students have multiple social and emotional barriers to learning that impede their ability to be successful. We will work closely with counselors, social workers and our after-school partner to address the social and emotional needs of students to ensure that they are prepared to learn.
- **Partnership with an afterschool provider.** The school has established a partnership with a strong after-school provider that assists the school in addressing a multitude of barriers to student learning.

We have several processes and systems in place to implement the non-negotiable features of the educational model. Both schools will utilize the same educational program which will be overseen by the Executive Director, Mike Rogers. Mike has personally created the vision for and implementation of the Moving Everest educational model. He has worked with school leadership to refine it over the last three years and will oversee its implementation in the new school. Mike anticipates that he will spend more than 50% of his time with the principal of Moving Everest 2 through the school's first year to ensure that the model is implemented with fidelity.

### **Principal Coaching and Mentoring**

We believe that principal coaching and development is critical to implementing the non-negotiables. To this end, the principal of the new school will be hired by January 2019 and will spend a significant amount of his or her time in the existing Moving Everest school working to gain a clear understanding of the Moving Everest way. The new principal will also receive twice weekly coaching with the executive director during this timeframe and during the launch of the new school. We believe that it is critical to the success of both schools for the principals to interact on a regular basis to share best practices, discuss data, raise challenges and engage in associated problem solving, conduct strategic planning and dialogue about the myriad of issues that arise in the operations of a school. To this end, the executive director will hold bi-weekly meetings with both principals to facilitate and direct these conversations.

### **Teacher Observation**

While principal coaching is essential, we must make certain that the highest quality teaching and learning is occurring in the classrooms. Moving Everest principals and directors of instruction will monitor staff performance on an ongoing and regular basis through both classroom visits and a review of the student performance data. The principal will visit each classroom on a bi-weekly basis for an

informal observation and provide staff with feedback and coaching. The new principal will conduct these classroom visits in coordination with the executive director and directors of instruction and will work directly with him to share observations and develop feedback and coaching plans as necessary during the first year of operations. We anticipate that over the course of this year, there will be a gradual release allowing the principal to take on increasing independence over time.

### **Professional Development and Induction**

We have also developed strong professional development and induction programs to ensure that all teachers are prepared to implement the ten core principles.

Coaching and mentoring faculty is at the heart of what we believe to be important and is one of the primary motivations that our faculty have indicated brought them to our school initially. Even though time is at a premium, this core tenant must remain fundamental to who we are as a school and we will maintain both our summer and weekly professional development programs to enhance teacher growth.

Our summer institute is a critical component of our professional development and induction. In the first year, all teachers will attend a three-week summer institute. In subsequent years, the summer institute will be two weeks for all staff. The summer institute hours will run from 8:00 to 4:00 for 10 days. The first week of the summer institute will focus on systems, structures, school culture and behavior management. Week two of the institute will focus on teaching and learning as well as curricula.

During the summer institute, new teachers will be assigned to a mentor teacher to guide them through day-to-day questions. In the first year of operations, the executive director and the principal will serve as mentors.

### **Data Driven Instruction**

Moving Everest Charter School will be a data-driven school where teachers regularly assess students through multiple formats and analyze the corresponding data to drive and personalize instruction. In addition, with the data generated through student assessment, Moving Everest teachers and administrators will have rich and actionable data through our digital content providers, Lexia and ST Math.

Teachers will engage in data analysis on a weekly basis during our early-release Wednesdays. This will allow for grade-level planning time, discussion of individual student progress, collaboration on instructional strategies, and integration of lesson plans. Additionally, there will be opportunities for goal setting and progress assessment, as well as developing, adjusting, and modifying instructional plans to ensure students are on track to meeting their learning goals.

Every six weeks, Moving Everest will hold a data professional development day. These days will provide teachers with dedicated time to conduct deeper data analysis to refine teaching plans, identify students for tutoring and additional rigor, and analyze data across grade level. These sessions will be led by the executive director, principal and teachers where appropriate. Additional outside experts will be utilized where appropriate.

**Moving Everest Professional Culture**

We have developed tools and systems to define and guide cultural norms which are at the heart of a strong, rigorous, successful and healthy Moving Everest school. The following table provides detail related to how the mission, vision, core values, and performance indicators align and intersect to provide teachers with MOVING EVEREST cultural norms.

<b>Fit and Performance Matrix for Moving Everest Charter School – Staff</b>	
<b>Mission:</b>	
The mission of Moving Everest Charter School is to create a school that dramatically transforms the lives of K-8 students and prepares them for success in college and in life through: the delivery of a rigorous and personalized academic program, a focus on holistic education and the development of strong character.	
<b>Vision:</b>	
Our vision is to provide Austin with a robust elementary school that prepares students to enter and excel in a college preparatory high school. Our goal is that 100% of Moving Everest graduates are able to attend one of their top three high school choices. We will provide students with a transformative experience that focuses on developing their academic skills while helping them to develop a strong character and love for learning.	

<b>Values</b>	<b>Performance Indicators</b>
<p>Curiosity: Always working to learn more in order to become the best</p> <ul style="list-style-type: none"> <li>• Staff members are open to new ways of approaching education</li> <li>• Staff members continually look for opportunities to improve their practice</li> <li>• Staff members have a cage busting mindset</li> </ul> <p>Perseverance: The ability to bounce back and navigate through taxing times</p> <ul style="list-style-type: none"> <li>• Staff members push on when faced with challenge</li> <li>• Staff members never give up on a student, a colleague, or themselves</li> <li>• Staff members are confident there is a solution to every challenge and do not give up until they find it</li> </ul> <p>Respect and Self-Control: Treating others the way you want to be treated</p>	<p>Professionalism: Acknowledgment that Moving Everest is a place of work</p> <ul style="list-style-type: none"> <li>• Staff members will be punctual every day, to all meetings, duties, and drop offs and pick ups</li> <li>• Staff members will follow the staff dress code every day</li> <li>• Staff members will respond to all forms of communication from colleagues, parents, and students within 24 hours</li> <li>• Staff members will use language appropriate for a work environment</li> <li>• Staff members will create documents without grammatical or spelling errors</li> <li>• Staff members will be solution focused and will not complain</li> <li>• Staff members will meet all deadlines</li> </ul> <p>Data Driven: The knowledge that we must monitor our students’ achievement through concrete data tools and use those tools to lead to students’ success</p>

Values	Performance Indicators
<ul style="list-style-type: none"> <li>• Staff members treat our colleagues in a manner that mirrors what they would expect from them</li> <li>• Staff members treat our students in a manner that mirrors what they would expect from them</li> <li>• Staff members treat our families in a manner that mirrors what they would expect from them</li> <li>• Staff members treat our community in a manner that mirrors what they would expect from them</li> </ul> <p>Self-Confidence: The belief that we each have the power to make change</p> <ul style="list-style-type: none"> <li>• Staff members believe that they can improve their practice every day</li> <li>• Staff members are confident in their ability to implement new ideas</li> <li>• Staff members know that every student in their class can and will be successful</li> </ul> <p>Courage and the Growth Mindset: Doing the right thing, even when it is not easy</p> <ul style="list-style-type: none"> <li>• Staff members hold one another accountable</li> <li>• Staff members stand up for the mission and vision of Moving Everest Charter School to both insiders and outsiders</li> <li>• Staff members ask for help when they do not know how to do something</li> </ul>	<ul style="list-style-type: none"> <li>• Staff members will use multiple sources of data to inform decision making</li> <li>• Staff members will set academic and behavior goals</li> <li>• Staff members will monitor proficiency through a variety of assessments</li> <li>• Staff members will develop long-term and short-term plans based on their data</li> <li>• Staff members will communicate to students and families about a student’s data</li> </ul> <p>Teach Like a Champion: Giving 110% to all parts of instruction each and every day</p> <ul style="list-style-type: none"> <li>• Staff members will submit lesson plans aligned to the Common Core State Standards every Friday by 5:00 pm</li> <li>• Staff members will complete a cycle of instruction with each standard</li> <li>• Staff members will differentiate their instruction to meet the needs of each student</li> <li>• Staff members will strictly adhere to the school instructional minute calendar</li> <li>• Staff members strictly adhere to their grade level pacing guide</li> <li>• Staff members will assess students for mastery daily</li> <li>• Staff members will update their grade book every Friday by 5:00 pm</li> <li>• Staff members will communicate student progress to parents bi-monthly</li> </ul> <p>Accountability: Owning the processes with 100% consistency</p> <ul style="list-style-type: none"> <li>• Staff members will hold one another accountable to every core value and performance indicator</li> <li>• Staff members will hold students accountable to every portion of the student code of conduct</li> <li>• Staff members will own their results and work proactively to improve them</li> </ul>



Values	Performance Indicators
	<p>High Expectations: Believing that our students and staff can be the best in all that we do</p> <ul style="list-style-type: none"> <li>• Staff members will create a classroom culture of high expectations that all students will strive to reach</li> <li>• Staff members will hold themselves and their peers to high standards in all that they do</li> <li>• Staff members will maintain high expectations even during difficult times</li> </ul>

**School Level Autonomies**

The new school principals will have limited autonomies, as described in response to Section 3.3.3. Once the new school is open and on stable footing, the school leaders will be encouraged to introduce new ideas and concepts to the executive director. The executive director who will work closely with the principal to assess the merits of each proposal and decide whether or not to implement it on a trial basis. However, we do not anticipate that this will occur during the school’s incubation and opening. As such, it is expected that the new school implementation process will mirror that of the existing school.

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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. As discussed above, principals will have the opportunity to propose modifications to the executive director who will partner with the principal to determine whether or not to implement any changes as trials to be assessed throughout the school year.

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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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Performance management at the network and school levels are overseen by the board of directors and implemented by the executive director and school principals. In general, the board sets the strategic direction for the schools and provides academic oversight. The board monitors the academic performance of the school against its the academic goals and metrics and provides guidance and support to the Executive Director regarding the academic program. Should either of the schools fail to meet its goals and metrics the Education Committee will work with the executive director to identify the aspects of the educational program that are failing to drive student achievement to its fullest potential.

The executive director will have the ultimate responsibility for the success of the school’s academics and will report directly to the board of directors. He will supervise and support the school principals and serve as a thought partner to them in the development of the school and the educational program.

The principals are the educational leaders of the schools and are responsible for managing the successful development and implementation of the educational program. They will report to the executive director and will manage all instructional staff. In addition, they will be directly responsible for meeting the school’s academic goals and driving successful student outcomes.

On an ongoing basis, each principal and the executive director use the following tools to monitor and diagnose performance:

<b>Assessment</b>	<b>Description</b>	<b>Why Chosen? For whom?</b>	<b>Frequency?</b>
NWEA’s MAP for Primary Grades and NWEA’s Measures of Academic Progress (MAP)	These are computer-assisted, nationally-normed tests that provide comparisons for individual students on a longitudinal basis and comparison vis-à-vis a national peer group	These exams give teachers and all school personnel feedback on students’ current skill level.  Grades K-8	We will deploy NWEA MAP for Primary Grades and MAP for grades 3-8, three times a year: Sept., Dec. and May
Interim assessments will be administered with results used by teachers to adjust their pacing, modify instruction and identify students needing additional help or rigor.	Regular assessments to determine student mastery of concepts/content. Data can be collected and analyzed quickly to put in place appropriate intervention strategies.	Teachers will write assessments with guidance from School Leader and expert consultants to assure alignment with scope/sequence, learning outcomes and standards.	6 weeks

Assessment	Description	Why Chosen? For whom?	Frequency?
Authentic, project-based assessments	Projects that are aligned to the curriculum assess children’s ability to access and synthesize information.	For students to show some self-selection and develop habits of planning larger scale projects that include authentic application of key concepts/skills.	3-5 weeks
Summative Assessments	Summative assessments will be administered through multiple methods including: portfolios, final projects, unit exams, and end of term exams.	For students to demonstrate mastery of skills and curricular content.	Quarterly

In addition, we will carefully track the My Voice, My School 5 Essentials Survey which is given annual by CPS and attendance which will be monitored daily.

Oversight of academic performance begins in the schools. It is our view that the principal should focus on improving instruction to enable teachers to teach at their best and students to learn to their utmost and on effectively managing people, data and processes to foster school improvement. The Moving Everest principals utilize the internal tools listed above and the associated data to conduct several key functions toward these goals:

- Assess student performance
- Monitor student progress
- Assess teacher effectiveness
- Provide teacher coaching and develop teacher growth plans
- Drive and inform observation, feedback, and planning meetings
- Direct re-teaching where and when necessary
- Assist teachers in creating whole and small group teaching plans

The key benchmarks that we will use are to determine whether a school is meeting its academic targets are tied to scoring a minimum of a 3.5 on the SQRP rating. Schools that are meeting the criteria for a 4.0 are on all measures will be considered high performing. Those with scores that include both 3.0 and 4.0 will be targeted for support and review by the executive director, and those with scores below 3.0 are considered to need academic intervention by management.

SQRP Metric	SQRP Score 4 points	SQRP Score 3 points
National School Growth Percentile on the NWEA Reading and Math Assessment	Between 70th and 89th percentile	Between 40th and 69th percentile
Percentage of Students Meeting or Exceeding National Average Growth Norms on NWEA Reading and Math Assessments	Between 60% and 69.9%	Between 50% and 59.9%
National School Attainment Percentile on the NWEA Reading and Math Assessment	Between 70th and 89th percentile	Between 40th and 69th percentile
Average Daily Attendance Rate (Grades K-8)	Between 95% and 95.9%	Between 94% and 94.9%
My Voice, My School 5 Essentials Survey	Organized	Moderately Organized

In the event that a school needs support or intervention, the executive director will work closely with the school principal to analyze the data, determine the cause for the failure to meet the benchmarks, identify areas for improvement and create the appropriate action plan. This action plan will be used as a tool during weekly principal-executive director meetings to track progress. If necessary, the executive director will provide the struggling principal with additional resources (internal or external) to accelerate progress on the action plan. The executive director will have a discretionary fund to engage external resources as needed.

The executive director will also support the principal in identifying any teachers that need targeted support, professional development and/or a corrective action plan. Together, they will devise action plans for teachers as necessary to improve their performance. In addition, the executive director will have discretionary funds set aside to hire external consultants for targeted support if necessary. In fact, the executive director took this action in the current fiscal year for the existing school to provide additional targeted teacher coaching which has been a highly successful initiative.

In the event that these actions do not result in improved outcomes, the executive director, in consultation with the board, will engage a third-party expert to conduct a 360 degree assessment of the educational program and its implementation.

Please note that the executive director’s discretionary funds mentioned above will sit at the central office and will not be seen on the school budget. Instead, they are embedded in the network fee.

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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.
- 

When the board of directors was developed, we assembled a robust team of ethnically diverse individuals with a broad base of skills and experiences. The board has demonstrated expertise in financial oversight and management, community engagement, human resource management and leadership development, fundraising, educational leadership, IT strategy and implementation, mental health services, and non-profit management. In addition, several members of the board have demonstrated ties to the Austin community. As such, we do not anticipate making any changes to the board composition or structure as we expand to our second school in the Austin neighborhood. The board is comprised of:

#### **Composition and Structure**

##### **DONNITA TRAVIS** - *Chairman of the Board*

Donnita Travis launched By The Hand Club For Kids in 2001. Under her leadership, By The Hand has undergone tremendous growth, becoming an \$8.5 million nonprofit with five locations and a staff of 120 employees and 300-plus volunteers. Donnita is a seasoned entrepreneur, organizational leader and fundraiser who will provide Moving Everest Charter School with the oversight and support that it needs to achieve success.

Donnita has been recognized for her work with children as Chicagoan of the Year in 2012, the recipient of Mayor Daley's SAGE Award in 2011 and Northwestern Kellogg's Social Entrepreneur of the Year in 2010. Travis has an MBA from Northwestern University and a BA in English and communications from Spalding University. Most recently, she attended Harvard Business School for Strategic Perspectives in Nonprofit Management after receiving the HBS Club of Chicago's Roman Nomitch Fellowship.

##### **VIVETTE PAYNE** - *Vice Chairman of the Board*

Vivette Payne is President of the Avery Payne Group, which specializes in organization, team and leadership development. Her expertise includes leadership coaching, team building, the custom design and delivery of leadership and other skill development programs, and facilitating planning and strategy development. Vivette also works with growing businesses to provide tips and techniques that help them start, grow and manage their business, from inception to peak performance.

Vivette has served as the Chair of The Professional Women's Network, and is a member of the Board of Directors of The Christian Working Woman and Orland Park Chamber of Commerce. Vivette has received the Chicago Southland Chamber of Commerce's "Business Woman of the Year" award, and the



Avery Payne Group has been awarded the U.S. Commerce Association’s “Outstanding Business Award”. Vivette holds a bachelor’s degree in psychology and a master’s degree in organization development.

**MICHAEL ROSS – Treasurer**

Michael Ross is a seasoned executive in corporate cash management and information technology consulting. Most recently, he served as the Executive Director of the Corporate Investment Bank at JPMorgan Chase. In addition to his corporate career, Michael is a reverend who has served as the Pastor of New Galilee Baptist Church in the Austin neighborhood for the last twelve years. Michael is also a community activist who volunteers at Big Brothers-Big Sisters where he serves on the executive board.

**CONSTANCE GIERE - Secretary**

Connie Giere is an independent health care information technology consultant in her own firm, Giere Health Care IT Consulting. She also serves as a consultant with the Epic Systems Emeritus Program, based in Verona, WI. In this role, Connie provides consultative services to major healthcare organizations during electronic health record implementations and upgrades. Prior to starting Giere Health Care IT Consulting, Connie was the Chief Health Informatics Officer at Loyola University Health System where she was responsible for developing and implementing the electronic health record (EHR) training, support and optimization programs for 4,000 clinicians. She also worked for Motorola, developing disease management and healthcare benefits programs. Connie has an extensive critical care clinical nursing background in the Chicago area. Connie is a registered nurse and received a Bachelor of Science degree from Trinity International University and a MBA in Health Care Management from Loyola University Chicago.

**SUSY FRANCIS BEST, PsyD, MBA**

Dr. Susy Francis Best is a bilingual (Spanish) clinical psychologist, consultant and executive coach with over 15 years of experience as a business leader with exceptional executive leadership skills, organizational creativity, business acumen, and expertise in diversity and inclusion. Her understanding of psychology and what motivates the human spirit enables her to envision a path for exceptional growth for both individuals and businesses.

Her portfolio of leadership and business experience includes both therapeutic and administrative roles. In addition to founding Thrive Group International (TGI), Dr. Susy provides consulting services to organizations in a variety of fields. Currently, Dr. Susy serves as an Inclusive Diversity Consultant for Allstate Insurance Company. Prior to founding TGI, she served as the President and CEO of Cornerstone Counseling Center of Chicago (CCCOC) for 12.5 years. During her tenure, Dr. Susy was able to create partnerships that allowed the budget and services to grow fivefold, expand services to include international clients and implement best practices that were invited for peer reviewed presentations.

Dr. Susy is a highly sought-after international speaker, visionary leadership coach, organizational consultant and content expert.

Dr. Susy has been featured as one of Chicago’s CBS 2 “Woman to Know”. She has also been featured on Windy City Live, ABC 7 Chicago, Moody Radio, the Holland Redfield Show, and other media outlets. A native of St. Croix, US Virgin Islands, Dr. Susy earned her B.A. in Psychology from Wheaton College (IL), and is a past Wheaton class representative and Alumni Board member and currently serves on the Board of Visitors. Dr. Susy completed her MBA from North Park University, and earned her doctorate



degree in Clinical Psychology from the Chicago School of Professional Psychology where she is an adjunct faculty. Dr. Susy is also a Fellow of Leadership Greater Chicago, and currently serves on the Leadership Fellows Association Board. She also serves as on the board of directors for several non-profit organizations in the region.

#### **DAVID ELDERSVELD**

David is currently the Executive Vice President, General Counsel and Corporate Secretary at Equity Lifestyle Properties, Inc. ELS is a real estate investment trust which owns and operates more than 400 lifestyle-oriented properties in 32 states and British Columbia. Prior to that, David worked at a privately-owned waste management business. For eight years, Dave held a number of positions for the Tribune Company including: Executive Vice President/General Counsel and Corporate Secretary and General Counsel. Dave began his career at the law firm of Sidley & Austin as an associate in the Corporate and Securities group. He is a graduate of Duke Law School and Calvin College.

#### **JOHN FELLOWES**

John Fellowes became President & CEO of Fellowes Brands in 2014, and represents the fourth generation of family leadership in this private Chicago-based company founded in 1917. He leads an organization of over 1600 employees in 18 global locations and 4 manufacturing facilities. Fellowes has been recognized as a 'Tribune, Top Places to Work' and receives award recognition each year for its product innovation, design and customer support.

John attended Torchbearer Bible Schools in Europe and holds a BS from Taylor University. He has received a Chicago Innovation Award and The Distinguished Alumnus Award from Taylor University. John also serves as a member of various business products industry and local community councils.

#### **COLLEEN SULLIVAN**

Ms. Sullivan is the Chief Executive Officer of CMT Digital Holdings LLC and has been a partner with the broader CMT Group for four years. Ms. Sullivan is also a Co-Founder and Managing Member of Sullivan Wolf Kailus LLC, a boutique law firm based in Chicago, that specializes in hedge fund, private equity, venture capital, digital assets, and other alternative investment products. Ms. Sullivan has advised hedge fund, proprietary trading, private equity, broker-dealer, venture capital, FinTech, digital assets, and financial trading technology clients on a broad range of domestic and international transactions and regulatory matters. Ms. Sullivan previously practiced in the Investment Funds and Derivatives group at Sidley Austin LLP and, at age 25, co-founded a company called iOptions Group LLC, which advised individuals with employee stock options how to hedge them with listed options. Ms. Sullivan is co-author of a USPTO issued patent with respect to the iOptions hedging and monetization strategies. Ms. Sullivan currently serves as co-chair of the FinTEch Chicago Legal and Regulatory Committee, is on the Advisory Board of Bloq Inc., and participates in various working groups with the Chamber of Digital Commerce, of which CMT Digital is an Executive Committee Member.

#### **DR. TIMOTHY WIENS**

Tim Wiens will be the Headmaster at Mount Paran Christian School in 2018. Mount Paran serves 1100+ students and is the largest independent school in Cobb County, Georgia. Wiens previously served as the Head of School at Delaware County Christian School, a highly diverse institution outside of Philadelphia, PA and as founding Headmaster at Boston Trinity Academy, a school serving a diverse population of students within the city of Boston, MA.



Wiens has also served as the Co-chair of Vanderbilt University's Peabody Professional Institute for Independent School Leadership and the ADVIS-Penn Independent School Leadership Institute at the University of Pennsylvania. Tim is the co-founder and served as the Executive Director of the Council on Educational Standards and Accountability (CESA) from 2009-2015 and was an assistant professor and visiting scholar at Wheaton College in Wheaton, Illinois.

### **Roles and Responsibilities**

The board's roles and responsibilities will not change as a result of adding a second school. As with one school, the board will continuously monitor the academic, operational and financial aspects of each of the two schools. It will continue to engage in the following key activities:

- Setting the strategic direction for both schools
- Hiring, setting compensation for, and evaluating the Executive Director
- Approving and overseeing the annual budgets
- Monitoring the financial health of the schools and the network as a whole
- Engaging in community outreach and fundraising efforts
- Hiring an independent auditor
- Providing academic oversight
- Evaluating the effectiveness of our partnership with By The Hand Club for Kids

### **Board Professional Development Priorities**

The board will continuously assess its professional development priorities at each stage of growth and will evaluate its effectiveness on an annual basis through a thorough self-review. The board holds an annual retreat during which time it determines what, if any, plans it has for professional development in the upcoming year. Our board is highly seasoned with tremendous non-profit experience both at a board and at a leadership level. Additionally, our board has extensive experience with start-up organizations and expanding organizations. As such, we anticipate that the need for growth specific professional development will be limited at this time.

### **Board Relationship to Schools**

The board's relationship to the schools is primarily through the executive director. This structure will remain in place as we expand to a second school. We do, however, expect that board members will make efforts to engage directly in activities that take place at both of the schools. This will be an extension of current board practice.

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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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We conduct an annual review of our Ethics Policy and Conflict of Interest statements which are attached as appendices. During the annual review we identify and make any and all necessary changes. These policies meet all CPS, state and federal requirements. In addition, all board members complete the annual CPS conflict of interest and ethics requirements.



**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 Moving Everest 2 school will require significant activity over the next 16-18 months to ensure a smooth and successful opening. As we opened the first Moving Everest school three years ago, we are well versed in the critical start-up steps and activities which we have categorized in the following buckets:

- Community engagement and recruitment
- Governance
- Human Resources
- Financial Management
- Operations and Administration
- Facility

The primary individuals managing these processes are the executive director, the incoming principal, the incoming office manager and consulting CFO, and consulting community engagement specialist. The principal and office manager will start on January 1, 2019, immediately following authorization. The other staff and consultants are already in place. The following table details the percent effort, timeframe and funding source for these efforts:

Startup Plan – July 1, 2018 – August 30, 2019

Title	Timeframe	Percent Effort	Funding Source
Executive Director	7/1/18-8/30/19	50%	Network Office Budget
Incoming Principal	1/1/19 8/30/19	100%	CSP Funding
Incoming Office Manager	1/1/19-8/30/19	100%	CSP Funding
Consulting CFO	7/1/18-8/30/19	20%	Network Office Budget
Consulting Community Engagement Specialist	7/1/18-6/30/19	20%	Network Office Budget

As Moving Everest is already an existing school, many of the systems, operating procedures and tools are already in place which minimizes the need to perform many of the activities typically found in a new school start-up plan. For example, we have already created non-academic documents and policies.

Additionally, we have existing relationships with vendors for services such as food service, insurance, technology support, related service providers, substitute teachers and others. In addition, the school's partner, By The Hand Club For Kids (BTH) will manage all aspects of the facility acquisition, design and construction/renovation. As such, our role will simply be to work with the architect to finalize the design which is based on our existing school, supporting in the permitting process, monitoring construction progress and finalizing the lease.

Please see the attached start-up plan for additional details.

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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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The attached decision rights matrix indicates that Moving Everest will run a tight organization where the network leadership is the primary decisionmaker for the majority of key school functions. As stated above, there are several areas where the schools will have input but ultimate decisions will be made by the executive director or the board of directors. Additionally, principals will be encouraged to bring ideas to the executive director to test and implement in their schools.

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

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As described in response to Section 3.1.3: Implementation of Growth Plans, Chicago Education Partnership is creating a small network office to support the expansion and incubation of the new school. The network office will be comprised of the following individuals:

- Executive Director, Michael Rogers
- Director of Operations and Compliance, Lakeshia Hayes
- Director of Diverse Learners, Kristen Soroko
- Director of Social and Emotional Learning, Laura Elk
- Director of Technology, Brad Ritchie

The network team is supplemented by an outsourced bookkeeping firm as well as Matthew Shaw who serves as a consulting CFO.

The team will be instrumental in the expansion and incubation of the new school. The team will manage all aspects of the application process although it may outsource certain functions as necessary. We anticipate that the new principal and an office manager will be hired in January 2019 immediately following approval from the CPS Board of Education. Upon hire, the new principal and office manager will lead efforts related to preparing the school for opening. We anticipate that Mike Rogers, Executive Director, will spend approximately 50% of his time working with the new principal to assist in preparations for school opening and to provide coaching and mentoring. Lakeshia Hayes, Director of Operations and Compliance will focus on training the new school office manager and on putting office

systems in place. She will be supported by the consulting CFO. Other members of the team are also expected to invest a significant portion of their time during the nine months prior to opening.

The following bios for the network staff provide insight into their individual and collective capacity to manage the expansion and incubation processes.

**Michael Rogers, Executive Director**

Michael has a strong track record of leadership and a rich, diverse set of experiences that uniquely prepare him for leading an innovative non-profit with an ambitious vision. His varied professional experiences, coupled with his educational background, have cultivated an innovative, entrepreneurial approach that combines insights from a variety of disciplines and industries. Mike has served as a classroom teacher, department head over three departments at a prestigious 3,000-student high school, and principal of an independent K-8 school of over 500 students. Mike also has a long history of volunteer experiences including over a decade as a high school Young Life leader and many years serving kids at By The Hand in the Austin community. Specifically, his vision for this school has been greatly informed by blending a deep understanding of education and schools with that of finance, economics and strategy. Mike holds a B.A. in political science from the University of Iowa and an M.A. in Educational Leadership from Aurora University.

**Kristin Soroko, Director of Diverse Learners**

Kristin was the founding Special Education Coordinator at Moving Everest. She came to Moving Everest with more than 7 years of education experience and a passion for using technology in the classroom. Most recently, Kristin served as Department Chair at Catalyst Circle Rock Charter School, where she worked to provide technology-rich experiences for her students. Prior to that, Kristin taught both 1st grade and special education at Namaste Charter School. Kristin has served as an edtech consultant, supporting 200 schools in the Midwest with literacy intervention and instruction and currently serves on the Board for the International Society for Technology in Education's Inclusive Learning Network. Kristin holds a B.A. in Journalism from Columbia College Chicago and an M.A. in Elementary Education from Roosevelt University with dual certification in general and special education.

**Lakeishia Hayes, Director of Operations and Compliance**

Lakeishia brings extensive business and school experience to Moving Everest. Most recently she spent seven years at the CICS Longwood campus as the business operations manager and school operations specialist. In these roles, she was responsible for operations management, inventory, vendor relations, grant applications, financial tracking and reporting, budgetary management, human resources and compliance issues. Lakeishia has a B.A. in Business and Economics from Benedictine University.

**Laura Elk, Director of Social and Emotional Learning**

Laura has more than 10 years of experience working with children in Chicago schools and in the community. Her experience includes work with children 0 – 3 years old in Early Intervention as well as elementary, middle and high school students at Catalyst Charter Schools and Perspectives Charter Schools. In this capacity, she was responsible for supporting scholars, families, teachers and school staff. She worked to develop interventions that helped scholars reach their full potential in school and life. She has a B.A. in Art History from Northern Illinois University, a M.A. in Social and Cultural Foundations in Education from DePaul University and her M.S.W. from the University of Chicago.

**Matthew Shaw**, Consulting 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.

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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

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**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.*

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This individual has not yet been identified.

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**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.*

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

School Leaders	3	0	1	0	0
Teachers	11	6	6	5	6
Network Staff	0	0	2	0	0
Other Key Supporting Staff	9	4	2	2	1
Total	23	10	11	7	7

Chicago Education Partnership has demonstrated a strong capacity to hire high quality individuals. As is common with many organizations in their first year of operations, Moving Everest had significant turnover in its first year. Since then we have dramatically increased our staff retention and have



sourced teachers and other staff who are much more qualified and who have demonstrated strong professional performance. This demonstrates our ability to recruit, identify and hire the staff who will drive success at Moving Everest. Our CEO and the new principal will lead the hiring process at Moving Everest 2. Since we are growing with one grade at a time, the annual hiring needs will be reasonably met by this team.

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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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As explained in response to the question above, Chicago Education Partnership excellent capacity to recruit and retain strong individuals who will have a significant and positive impact on the students of Moving Everest 2. We have demonstrated our ability to attract, hire and retain excellent school leadership, teachers and other key supporting staff.

### **Recruitment and Hiring**

Our goal is to recruit, hire, develop and retain a team of high-performing educators who exemplify our mission, principles and cultural values. We also fundamentally believe that a diverse staff is a more effective one. Our model requires a diversity of teacher talent with respect to experience level and expertise, and we additionally plan to hire teachers from a diversity of backgrounds, including hiring a significant portion of staff reflective of our students' backgrounds, our goal is that at least 70% of our staff meet at least one of the following diversity targets:

- Ethnic minority
- Men
- Career changer
- Non-TFA corps member

We will recruit teaching staff through both national and local searches, building on the vast experience of our school leadership team in sourcing, selecting and hiring instructional staff. We have budgeted \$10,000 per year for teacher recruitment activities. To source our teachers, we will access our extensive networks, attend job fairs, and post job descriptions widely on websites such as the Illinois Network of Charter Schools, Idealist.org, Monster.com, EducationAmerica.net, and School Spring. In addition, we will work with organizations such as: Teach for America, Golden Apple, University Teacher Education Program, and The Inner-City Teaching Corps. Furthermore, we will recruit from local and national schools of education. Finally, we will recruit through the Moving Everest Charter School website and social media such as Facebook, Twitter and LinkedIn.

We are not planning to open until Fall 2019, thus, we will have an extended period of time to conduct our teacher hiring process. Informally, we will initiate the process upon approval and begin accessing our networks. The formal process will begin in February 2019, at which time we will start our initial outreach and teacher sourcing activities. After a comprehensive resume review, we will begin our interviewing and teacher observations in March 2019 – June 2019. The hiring process will continue through July 2019 which is our target completion date for all hiring. During the hiring process we will engage in the following activities:



### **Phone Screen**

The phone screen will be a short, 20-30 minute conversation in order to double check and/or clarify any information from the resume review. The reason for a phone screen is to give a quick check to see if what Moving Everest Charter School observed on paper is what this person is about. Moving Everest is looking to check off a minimum of three core values and performance indicators during this screen.

### **Written Exercise**

Candidates who reach the exercise phase will be given four different questions that address our values. Although Moving Everest Charter School will be looking for performance indicators while reviewing the responses to the exercise, it is focusing on the core values. Candidates will have three days to complete the activity and return it to the team and must answer the questions in 500 words or less. Moving Everest Charter School is putting these guidelines in place in order for us to quickly check their professionalism and accountability to a deadline.

### **Lesson Sample and Post-Lesson Interview**

Candidates will be asked to create and teach a lesson based upon the Common Core State Standards in either reading or math. Moving Everest Charter School is not looking for a teacher who will need to be given all of the answers all of the time, but someone who will strategically attack a problem and seek clarity and help when needed. The lesson will be observed by the school leader and at least one other staff member in order to get a variety of viewpoints. The lesson will be assessed based upon a sample lesson rubric. When the lesson is completed, the staff member and school leader will conduct a post-lesson interview.

### **School Observation and Interview**

When a candidate is asked back for an in-depth interview, he/she will first be asked to tour the building. He/She will be given a tour of Moving Everest Charter School by one of our students as opposed to a staff member so that he/she is focused on the school environment as opposed to the conversation. This school tour will be referenced throughout the interview process. After the tour is completed, candidates will participate in an in-depth interview with the administration team and a minimum of one teacher or alternate team member. This brings a variety of perspectives to the candidate and allows the candidate to get to know more about us. All core values and performance indicators will be targeted both formally and informally.

Following the school observation and interview, Moving Everest will conduct thorough reference checks as well as a criminal background check.

### **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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#### **Overview**

The budget represents a realistic and conservative financial plan for the launch and growth of Moving Everest 2. The budget includes assumptions based on our experience at Moving Everest over the last three years. The staffing plan is built to mirror the staffing plan at the current school and the compensation and benefits assumptions are aligned to our FY19 Moving Everest budget. This budget is aligned with the proposed school program as it is based on the budget of our existing school.

Please note that we did not inflate wages or expenses in this budget. The budget template does not allow for revenue inflation over the five years. Since revenues stay flat, we cannot increase wage or non-personnel expense rates. An organization cannot be financially viable when expenses inflate while revenues do not. However, over the past several years we have seen CPS per pupil revenues stay flat or even decrease. During years where this has occurred, we have carefully reviewed our budget to assess where we can reduce expenses and/or manage our staffing to keep wages constant. Additionally, we budget a contingency reserve of 3% of PCTC which we have used to offset mid-year retroactive decreases in per pupil funding.

The proposed school will operate at an annual surplus and will maintain a cash balance of at least 30 days cash on hand at all times. This reserve along with the 3% contingency will ensure that the school will remain financially healthy in the event that revenues are lower and/or expenses are higher than anticipated. Additionally, should there be an unanticipated shift in revenue or expense, we will carefully review the budget to identify potential areas of savings.

#### **Budget Assumptions:**

The budget template is designed to note major assumptions for both revenues and expenditures. As such, we will only discuss the assumptions that require additional explanation in this budget narrative.

The budget includes \$950,000 in CSP funding over the planning year and first two years of operations. This grant is administered by ISBE and we have already been in conversation with them. We were successful in winning the CSP grant for our first school and are confident that we will be able to obtain it again for the proposed school.

The budget includes a fundraising goal of \$700,000 over the course of the first four years of operations.

As mentioned above all salaries, benefits and non-personnel expenses are aligned to those at our existing school.

As described in section 3.1.3: Implementation of Growth Plans in the facility risk portion, our afterschool partner, By The Hand Club For Kids (BTH) will develop the school and lease it to Moving Everest 2 for



\$750 per pupil. The rent will include all occupancy expenses and all FF&E. In other words, BTH will purchase all the furniture, technology and other fixtures and equipment necessary to fully implement the Moving Everest program.

As mentioned above, we have set aside 3% of PCTC as a contingency reserve which will protect the school against unexpected decreases in revenue or increases in expense.

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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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We are projecting a fundraising need of \$700,000. We believe that this is an easily attained target as it is significantly lower than the amounts that we have raised for our existing school. Over the course of the last four years, we have raised well in excess of \$1.2M. Our board and executive director have strong ties to the philanthropic community and to foundations that are interested in charter schools and in our unique model. In addition, there is a significant philanthropic interest in replicating schools and new school launches. We have already begun to have conversations with donors and foundations about the possibility of securing funds to launch and scale the new school. Over the course of the next six months we will engage more heavily in prospecting potential donors and identifying foundations aligned with our mission and vision.

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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 addition of the new campus will have a positive impact on the sustainability of the existing campus. Currently, the existing campus is covering 100% of the wages and benefits for the staff who will shift to the network office. As the new campus scales, it will share in these expenses, offsetting the costs to the first school. Since the network office is not scaling in direct proportion to the number of additional students, the second campus will generate significant economies of scale.

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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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Chicago Education Partnership has not been on financial probation over the past three years.

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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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Chicago Education Partnership has a robust Financial Policies and Procedures Manual. The manual has been reviewed by CEP’s auditor and approved by the board of directors. The manual includes the following key policies and procedures:



- Staffing
- Accounting System and Cycle
- Segregation of Duties
- Cash Receipts and Donations
- Purchasing Processes
- Procurement Process and Cash Disbursements
- Reimbursement of Expenses
- Payroll
- Bank Accounts
- Electronic Funds Transfers and Wire Transfers
- Investment of Funds
- Borrowing
- Capitalization
- Audit

These controls were designed to scale as CEP expands. They will serve the central office and both of the Moving Everest schools. The policies and procedures ensure the viability of the organization and address the role of executive director, director of operations and compliance, board treasurer, board as a whole, and external accounting firm. In addition, they describe the network’s reporting responsibility to the board of directors.

The full manual 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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Chicago Education Partnership is committed to the following financial goals and metrics:

Cash Reserve	45 days
Current Ratio	1.2
Net Asset Ratio	80%
Variance to Budget	+/- 10%
Development Targets	Meet or exceed

We are currently exceeding all five metrics and are committed to continuing to do so. The Executive Director and consulting CFO monitor these metrics on a monthly basis and provide the board of directors with regular reports on their status. The board of directors review financial reports and a budget to actual report at board meetings and works with the Executive Director in the event that the organization is not meeting its financial goals. Together the board of directors and Executive Director develop an action plan and determine immediate measure that the Executive Director will take to ensure the organization’s strong financial position.



In addition, the Executive Director and CFO develop annual budgets which are informed by historic finances, multi-year forecasts and input from key staff. The budgets are presented to the board of directors for review, suggested modification, and approval. Once approved, the budget provides the Executive Director with a financial roadmap for the school year. In the event that the Executive Director projects a significant variance in the budget he seeks approval for a budget modification from the board of directors.

Finally, the organization is audited annually, and both the board and management are provided with information about the school's financial operations which allows them to make key decisions about the financial future of the organization.

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

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Chicago Education Partnership has robust financial policies, procedures and practices. The Executive Director and director of operations and compliance are heavily involved in the school's financial management and are supported by an external accounting firm and a seasoned consulting CFO. The external services have capacity to scale with the organization. Additionally, the accounting firm and consulting CFO are planning to upgrade the accounting software from QuickBooks to a more robust software that can provide an increasingly complex organization with the tools necessary to effectively manage multiple schools. This will be completed in advance of launching the new school. In addition, the consulting CFO and director of operations and compliance will put more robust procurement systems in place to facilitate purchasing and cash disbursements for two campuses. The combination of the staff, additional services from external service providers, and new systems and tools will ensure smooth financial management of both schools.