

# U.S. Department of Education

Washington, D.C. 20202-5335



## APPLICATION FOR GRANTS UNDER THE

**CHARTER SCHOOL PROGRAM STATE EDUCATION AGENCY**

**CFDA # 84.282A**

**PR/Award # U282A080007**

**Grants.gov Tracking#: GRANT00405867**

Closing Date: FEB 01, 2008

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This application was generated using the PDF functionality. The PDF functionality automatically numbers the pages in this application. Some pages/sections of this application may contain 2 sets of page numbers, one set created by the applicant and the other set created by e-Application's PDF functionality. Page numbers created by the e-Application PDF functionality will be preceded by the letter e (for

example, e1, e2, e3, etc.).

Application for Federal Assistance SF-424

Version 02

* 1. Type of Submission: <input type="radio"/> Preapplication <input checked="" type="radio"/> Application <input type="radio"/> Changed/Corrected Application	* 2. Type of Application: <input checked="" type="radio"/> New <input type="radio"/> Continuation <input type="radio"/> Revision	* If Revision, select appropriate letter(s): _____ * Other (Specify) _____
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* 3. Date Received: 01/31/2008	4. Applicant Identifier: _____
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5a. Federal Entity Identifier: _____	* 5b. Federal Award Identifier: _____
---	--

**State Use Only:**

6. Date Received by State: _____	7. State Application Identifier: _____
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**8. APPLICANT INFORMATION:**

* a. Legal Name: Oregon Department of Education	
* b. Employer/Taxpayer Identification Number (EIN/TIN): (b)(2)	* c. Organizational DUNS: 809790264

**d. Address:**

* Street1: 255 Capitol St NE
Street2: _____
* City: Salem
County: _____
* State: OR: Oregon
Province: _____
* Country: USA: UNITED STATES
* Zip / Postal Code: 97306

**e. Organizational Unit:**

Department Name: Educ Improvement & Innovation	Division Name: _____
--	----------------------

**f. Name and contact information of person to be contacted on matters involving this application:**

Prefix: _____	* First Name: Margaret
Middle Name: _____	
* Last Name: Bates	
Suffix: _____	
Title: _____	
Organizational Affiliation: _____	
* Telephone Number: 503-947-5615	Fax Number: _____
* Email: margaret.bates@state.or.us	

Application for Federal Assistance SF-424

Version 02

9. Type of Applicant 1: Select Applicant Type:

A: State Government

Type of Applicant 2: Select Applicant Type:

Type of Applicant 3: Select Applicant Type:

\* Other (specify):

\* 10. Name of Federal Agency:

U.S. Department of Education

11. Catalog of Federal Domestic Assistance Number:

84.282

CFDA Title:

Charter Schools

\* 12. Funding Opportunity Number:

ED-GRANTS-120307-001

\* Title:

84.282A Charter School Program State Education Agencies

13. Competition Identification Number:

84-282A2008-1

Title:

14. Areas Affected by Project (Cities, Counties, States, etc.):

\* 15. Descriptive Title of Applicant's Project:

Oregon Charter School Grant Program

Attach supporting documents as specified in agency instructions.

Application for Federal Assistance SF-424

Version 02

16. Congressional Districts Of:

\* a. Applicant

\* b. Program/Project

Attach an additional list of Program/Project Congressional Districts if needed.

17. Proposed Project:

\* a. Start Date:

\* b. End Date:

18. Estimated Funding (\$):

* a. Federal	<input type="text" value="3,000,000.00"/>
* b. Applicant	<input type="text" value="0.00"/>
* c. State	<input type="text" value="0.00"/>
* d. Local	<input type="text" value="0.00"/>
* e. Other	<input type="text" value="0.00"/>
* f. Program Income	<input type="text" value="0.00"/>
* g. TOTAL	<input type="text" value="3,000,000.00"/>

\* 19. Is Application Subject to Review By State Under Executive Order 12372 Process?

- a. This application was made available to the State under the Executive Order 12372 Process for review on
- b. Program is subject to E.O. 12372 but has not been selected by the State for review.
- c. Program is not covered by E.O. 12372.

\* 20. Is the Applicant Delinquent On Any Federal Debt? (If "Yes", provide explanation.)

- Yes
- No

21. \*By signing this application, I certify (1) to the statements contained in the list of certifications\*\* and (2) that the statements herein are true, complete and accurate to the best of my knowledge. I also provide the required assurances\*\* and agree to comply with any resulting terms if I accept an award. I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 218, Section 1001)

\*\* I AGREE

\*\* The list of certifications and assurances, or an internet site where you may obtain this list, is contained in the announcement or agency specific instructions.

Authorized Representative:

Prefix:  \* First Name:

Middle Name:

\* Last Name:

Suffix:

\* Title:

\* Telephone Number:  Fax Number:

\* Email:

\* Signature of Authorized Representative:  \* Date Signed:

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Standard Form 424 (Revised 10/2005)  
Prescribed by OMB Circular A-102

**\* Applicant Federal Debt Delinquency Explanation**

The following field should contain an explanation if the Applicant organization is delinquent on any Federal Debt. Maximum number of characters that can be entered is 4,000. Try and avoid extra spaces and carriage returns to maximize the availability of space.

## Attachments

AdditionalCongressionalDistricts

**File Name**

**Mime Type**

AdditionalProjectTitle

**File Name**

**Mime Type**



**U.S. DEPARTMENT OF EDUCATION**  
**BUDGET INFORMATION**  
**NON-CONSTRUCTION PROGRAMS**

OMB Control Number: 1890-0004

Expiration Date: 06/30/2005

Name of Institution/Organization:  
 Oregon Department of Education

Applicants requesting funding for only one year should complete the column under "Project Year 1." Applicants requesting funding for multi-year grants should complete all applicable columns. Please read all instructions before completing form.

**SECTION A - BUDGET SUMMARY**  
**U.S. DEPARTMENT OF EDUCATION FUNDS**

Budget Categories	Project Year 1(a)	Project Year 2 (b)	Project Year 3 (c)	Project Year 4 (d)	Project Year 5 (e)	Total (f)
1. Personnel	\$ 65,410	\$ 153,266	\$ 157,491	\$ 0	\$ 0	\$ 376,167
2. Fringe Benefits	\$ 29,799	\$ 68,082	\$ 69,974	\$ 0	\$ 0	\$ 167,855
3. Travel	\$ 10,000	\$ 14,928	\$ 17,342	\$ 0	\$ 0	\$ 42,270
4. Equipment	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
5. Supplies	\$ 13,000	\$ 16,502	\$ 22,338	\$ 0	\$ 0	\$ 51,840
6. Contractual	\$ 10,000	\$ 25,000	\$ 32,000	\$ 0	\$ 0	\$ 67,000
7. Construction	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
8. Other	\$ 2,850,000	\$ 6,175,000	\$ 6,650,000	\$ 0	\$ 0	\$ 15,675,000
9. Total Direct Costs (lines 1-8)	\$ 2,978,209	\$ 6,452,778	\$ 6,949,145	\$ 0	\$ 0	\$ 16,380,132
10. Indirect Costs*	\$ 21,791	\$ 47,222	\$ 50,855	\$ 0	\$ 0	\$ 119,868
11. Training Stipends	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
12. Total Costs (lines 9-11)	\$ 3,000,000	\$ 6,500,000	\$ 7,000,000	\$ 0	\$ 0	\$ 16,500,000

**\*Indirect Cost Information (To Be Completed by Your Business Office):**

If you are requesting reimbursement for indirect costs on line 10, please answer the following questions:

(1) Do you have an Indirect Cost Rate Agreement approved by the Federal government?  Yes  No

(2) If yes, please provide the following information:

Period Covered by the Indirect Cost Rate Agreement: From: 7/1/2007 To: 6/30/2008 (mm/dd/yyyy)

Approving Federal agency:  ED  Other (please specify): \_\_\_\_\_

(3) For Restricted Rate Programs (check one) -- Are you using a restricted indirect cost rate that:

Is included in your approved Indirect Cost Rate Agreement? or,  Complies with 34 CFR 76.564(c)(2)?



**U.S. DEPARTMENT OF EDUCATION**  
**BUDGET INFORMATION**  
**NON-CONSTRUCTION PROGRAMS**

OMB Control Number: 1890-0004

Expiration Date: 06/30/2005

Name of Institution/Organization:  
 Oregon Department of Education

Applicants requesting funding for only one year should complete the column under "Project Year 1." Applicants requesting funding for multi-year grants should complete all applicable columns. Please read all instructions before completing form.

**SECTION B - BUDGET SUMMARY**  
**NON-FEDERAL FUNDS**

Budget Categories	Project Year 1(a)	Project Year 2 (b)	Project Year 3 (c)	Project Year 4 (d)	Project Year 5 (e)	Total (f)
1. Personnel	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
2. Fringe Benefits	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
3. Travel	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
4. Equipment	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
5. Supplies	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
6. Contractual	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
7. Construction	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
8. Other	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
9. Total Direct Costs (lines 1-8)	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
10. Indirect Costs	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
11. Training Stipends	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
12. Total Costs (lines 9-11)	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0

## ASSURANCES - NON-CONSTRUCTION PROGRAMS

OMB Approval No. 4040-0007  
Expiration Date 04/30/2008

Public reporting burden for this collection of information is estimated to average 15 minutes per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the Office of Management and Budget, Paperwork Reduction Project (0348-0040), Washington, DC 20503.

**PLEASE DO NOT RETURN YOUR COMPLETED FORM TO THE OFFICE OF MANAGEMENT AND BUDGET. SEND IT TO THE ADDRESS PROVIDED BY THE SPONSORING AGENCY.**

**NOTE:** Certain of these assurances may not be applicable to your project or program. If you have questions, please contact the awarding agency. Further, certain Federal awarding agencies may require applicants to certify to additional assurances. If such is the case, you will be notified.

As the duly authorized representative of the applicant, I certify that the applicant:

1. Has the legal authority to apply for Federal assistance and the institutional, managerial and financial capability (including funds sufficient to pay the non-Federal share of project cost) to ensure proper planning, management and completion of the project described in this application.
2. Will give the awarding agency, the Comptroller General of the United States and, if appropriate, the State, through any authorized representative, access to and the right to examine all records, books, papers, or documents related to the award; and will establish a proper accounting system in accordance with generally accepted accounting standards or agency directives.
3. Will establish safeguards to prohibit employees from using their positions for a purpose that constitutes or presents the appearance of personal or organizational conflict of interest, or personal gain.
4. Will initiate and complete the work within the applicable time frame after receipt of approval of the awarding agency.
5. Will comply with the Intergovernmental Personnel Act of 1970 (42 U.S.C. §§4728-4763) relating to prescribed standards for merit systems for programs funded under one of the 19 statutes or regulations specified in Appendix A of OPM's Standards for a Merit System of Personnel Administration (5 C.F.R. 900, Subpart F).
6. Will comply with all Federal statutes relating to nondiscrimination. These include but are not limited to: (a) Title VI of the Civil Rights Act of 1964 (P.L. 88-352) which prohibits discrimination on the basis of race, color or national origin; (b) Title IX of the Education Amendments of 1972, as amended (20 U.S.C. §§1681-1683, and 1685-1686), which prohibits discrimination on the basis of sex; (c) Section 504 of the Rehabilitation Act of 1973, as amended (29 U.S.C. §794), which prohibits discrimination on the basis of handicaps; (d) the Age Discrimination Act of 1975, as amended (42 U.S.C. §§6101-6107), which prohibits discrimination on the basis of age; (e) the Drug Abuse Office and Treatment Act of 1972 (P.L. 92-255), as amended, relating to nondiscrimination on the basis of drug abuse; (f) the Comprehensive Alcohol Abuse and Alcoholism Prevention, Treatment and Rehabilitation Act of 1970 (P.L. 91-616), as amended, relating to nondiscrimination on the basis of alcohol abuse or alcoholism; (g) §§523 and 527 of the Public Health Service Act of 1912 (42 U.S.C. §§290 dd-3 and 290 ee- 3), as amended, relating to confidentiality of alcohol and drug abuse patient records; (h) Title VIII of the Civil Rights Act of 1968 (42 U.S.C. §§3601 et seq.), as amended, relating to nondiscrimination in the sale, rental or financing of housing; (i) any other nondiscrimination provisions in the specific statute(s) under which application for Federal assistance is being made; and, (j) the requirements of any other nondiscrimination statute(s) which may apply to the application.
7. Will comply, or has already complied, with the requirements of Titles II and III of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 (P.L. 91-646) which provide for fair and equitable treatment of persons displaced or whose property is acquired as a result of Federal or federally-assisted programs. These requirements apply to all interests in real property acquired for project purposes regardless of Federal participation in purchases.
8. Will comply, as applicable, with provisions of the Hatch Act (5 U.S.C. §§1501-1508 and 7324-7328) which limit the political activities of employees whose principal employment activities are funded in whole or in part with Federal funds.

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Prescribed by OMB Circular A-102

Tracking Number: GRANT00405867

9. Will comply, as applicable, with the provisions of the Davis- Bacon Act (40 U.S.C. §§276a to 276a-7), the Copeland Act (40 U.S.C. §276c and 18 U.S.C. §874), and the Contract Work Hours and Safety Standards Act (40 U.S.C. §§327- 333), regarding labor standards for federally-assisted construction subagreements.
10. Will comply, if applicable, with flood insurance purchase requirements of Section 102(a) of the Flood Disaster Protection Act of 1973 (P.L. 93-234) which requires recipients in a special flood hazard area to participate in the program and to purchase flood insurance if the total cost of insurable construction and acquisition is \$10,000 or more.
11. Will comply with environmental standards which may be prescribed pursuant to the following: (a) institution of environmental quality control measures under the National Environmental Policy Act of 1969 (P.L. 91-190) and Executive Order (EO) 11514; (b) notification of violating facilities pursuant to EO 11738; (c) protection of wetlands pursuant to EO 11990; (d) evaluation of flood hazards in floodplains in accordance with EO 11988; (e) assurance of project consistency with the approved State management program developed under the Coastal Zone Management Act of 1972 (16 U.S.C. §§1451 et seq.); (f) conformity of Federal actions to State (Clean Air) Implementation Plans under Section 176(c) of the Clean Air Act of 1955, as amended (42 U.S.C. §§7401 et seq.); (g) protection of underground sources of drinking water under the Safe Drinking Water Act of 1974, as amended (P.L. 93-523); and, (h) protection of endangered species under the Endangered Species Act of 1973, as amended (P.L. 93- 205).
12. Will comply with the Wild and Scenic Rivers Act of 1968 (16 U.S.C. §§1271 et seq.) related to protecting components or potential components of the national wild and scenic rivers system.
13. Will assist the awarding agency in assuring compliance with Section 106 of the National Historic Preservation Act of 1966, as amended (16 U.S.C. §470), EO 11593 (identification and protection of historic properties), and the Archaeological and Historic Preservation Act of 1974 (16 U.S.C. §§469a-1 et seq.).
14. Will comply with P.L. 93-348 regarding the protection of human subjects involved in research, development, and related activities supported by this award of assistance.
15. Will comply with the Laboratory Animal Welfare Act of 1966 (P.L. 89-544, as amended, 7 U.S.C. §§2131 et seq.) pertaining to the care, handling, and treatment of warm blooded animals held for research, teaching, or other activities supported by this award of assistance.
16. Will comply with the Lead-Based Paint Poisoning Prevention Act (42 U.S.C. §§4801 et seq.) which prohibits the use of lead-based paint in construction or rehabilitation of residence structures.
17. Will cause to be performed the required financial and compliance audits in accordance with the Single Audit Act Amendments of 1996 and OMB Circular No. A-133, "Audits of States, Local Governments, and Non-Profit Organizations."
18. Will comply with all applicable requirements of all other Federal laws, executive orders, regulations, and policies governing this program.

* SIGNATURE OF AUTHORIZED CERTIFYING OFFICIAL Margaret Bates	* TITLE Assistant Superintendent
* APPLICANT ORGANIZATION Oregon Department of Education	* DATE SUBMITTED 01-31-2008

Standard Form 424B (Rev. 7-97) Back

# DISCLOSURE OF LOBBYING ACTIVITIES

Complete this form to disclose lobbying activities pursuant to 31 U.S.C. 1352  
(See reverse for public burden disclosure.)

Approved by OMB

0348-0046

<p>1. * Type of Federal Action:</p> <p><input type="checkbox"/> a. contract</p> <p><input checked="" type="checkbox"/> b. grant</p> <p><input type="checkbox"/> c. cooperative agreement</p> <p><input type="checkbox"/> d. loan</p> <p><input type="checkbox"/> e. loan guarantee</p> <p><input type="checkbox"/> f. loan insurance</p>	<p>2. * Status of Federal Action:</p> <p><input type="checkbox"/> a. bid/offer/application</p> <p><input checked="" type="checkbox"/> b. initial award</p> <p><input type="checkbox"/> c. post-award</p>	<p>3. * Report Type:</p> <p><input checked="" type="checkbox"/> a. initial filing</p> <p><input type="checkbox"/> b. material change</p> <p>For Material Change Only:</p> <p>year                      quarter</p> <p>date of last report</p>
<p>4. Name and Address of Reporting Entity:</p> <p><input checked="" type="checkbox"/> Prime    <input type="checkbox"/> SubAwardee    Tier if known:</p> <p>* Name: Oregon Department of Education</p> <p>* Address: 255 Capitol St NE Salem OR: Oregon 97310</p> <p>Congressional District, if known: 05</p>	<p>5. If Reporting Entity in No.4 is Subawardee, Enter Name and Address of Prime:</p>	
<p>6. * Federal Department/Agency: Department of Education/OII</p>	<p>7. * Federal Program Name/Description: Charter Schools</p> <p>CFDA Number, if applicable: 84.282</p>	
<p>8. Federal Action Number, if known:</p>	<p>9. Award Amount, if known:</p>	
<p>10. a. Name and Address of Lobbying Registrant (if individual, complete name):</p> <p>* Name: NA  NA</p> <p>* Address:</p>	<p>b. Individual Performing Services (including address if different from No. 10a):</p> <p>* Name: NA  NA</p>	
<p>11. Information requested through this form is authorized by title 31 U.S.C. section 1352. This disclosure of lobbying activities is a material representation of fact upon which reliance was placed by the tier above when the transaction was made or entered into. This disclosure is required pursuant to 31 U.S.C. 1352. This information will be reported to the Congress semi-annually and will be available for public inspection. Any person who fails to file the required disclosure shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.</p>		
<p>* Signature: Margaret Bates</p> <p>* Name: Salam  Noor</p> <p>Title: Assistant Superintendent</p> <p>Telephone No.:</p> <p>Date: 01-31-2008</p>		

**Public Burden Disclosure Statement**

According to the Paperwork Reduction Act, as amended, no persons are required to respond to a collection of information unless it displays a valid OMB Control Number. The valid OMB control number for this information collection is OMB No. 0348-0046. Public reporting burden for this collection of information is estimated to average 10 minutes per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the Office of Management and Budget, Paperwork Reduction Project (0348-0046), Washington, DC 20503.

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## CERTIFICATION REGARDING LOBBYING

### Certification for Contracts, Grants, Loans, and Cooperative Agreements

The undersigned certifies, to the best of his or her knowledge and belief, that:

(1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure of Lobbying Activities," in accordance with its instructions.

(3) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly. This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

### Statement for Loan Guarantees and Loan Insurance

The undersigned states, to the best of his or her knowledge and belief, that:

If any funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this commitment providing for the United States to insure or guarantee a loan, the undersigned shall complete and submit Standard Form-LLL, "Disclosure of Lobbying Activities," in accordance with its instructions. Submission of this statement is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required statement shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

* APPLICANT'S ORGANIZATION
----------------------------

Oregon Department of Education
--------------------------------

* PRINTED NAME AND TITLE OF AUTHORIZED REPRESENTATIVE
---

Prefix:        * First Name: Salam        Middle Name:
--

* Last Name: Noor        Suffix:        * Title: Assistant Superintendent
---

* SIGNATURE: Margaret Bates        * DATE: 01/31/2008
---

# SUPPLEMENTAL INFORMATION REQUIRED FOR DEPARTMENT OF EDUCATION GRANTS

## 1. Project Director

\* Name:

Margaret

Bates

\* Address:

255 Capitol St NE

Salem

OR: Oregon

97310

USA: UNITED STATES

\* Phone Number:

5063-947-5615

Fax Number:

Email:

## 2. Applicant Experience:

Yes  No  Not applicable to this program

## 3. Human Subjects Research

Are any research activities involving human subjects planned at any time during the proposed project Period?

Yes  No

Are ALL the research activities proposed designated to be exempt from the regulations?

Yes Provide Exemption(s) #:

No Provide Assurance #, if available:

**Please attach an explanation Narrative:**

FileName

MimeType

## NOTICE TO ALL APPLICANTS

The purpose of this enclosure is to inform you about a new provision in the Department of Education's General Education Provisions Act (GEPA) that applies to applicants for new grant awards under Department programs. This provision is Section 427 of GEPA, enacted as part of the Improving America's Schools Act of 1994 (Public Law (P.L.) 103-382).

### To Whom Does This Provision Apply?

Section 427 of GEPA affects applicants for new grant awards under this program. **ALL APPLICANTS FOR NEW AWARDS MUST INCLUDE INFORMATION IN THEIR APPLICATIONS TO ADDRESS THIS NEW PROVISION IN ORDER TO RECEIVE FUNDING UNDER THIS PROGRAM.**

(If this program is a State-formula grant program, a State needs to provide this description only for projects or activities that it carries out with funds reserved for State-level uses. In addition, local school districts or other eligible applicants that apply to the State for funding need to provide this description in their applications to the State for funding. The State would be responsible for ensuring that the school district or other local entity has submitted a sufficient section 427 statement as described below.)

### What Does This Provision Require

Section 427 requires each applicant for funds (other than an individual person) to include in its application a description of the steps the applicant proposes to take to ensure equitable access to, and participation in, its Federally-assisted program for students, teachers, and other program beneficiaries with special needs. This provision allows applicants discretion in developing the required description. The statute highlights six types of barriers that can impede equitable access or participation: gender, race, national origin, color, disability, or age. Based on local circumstances, you should determine whether these or other barriers may prevent your students, teachers, etc. from such access or participation in, the Federally-funded project or activity. The description in your application of steps to be taken to overcome these barriers need not be lengthy; you may provide a clear and succinct

description of how you plan to address those barriers that are applicable to your circumstances. In addition, the information may be provided in a single narrative, or, if appropriate, may be discussed in connection with related topics in the application.

Section 427 is not intended to duplicate the requirements of civil rights statutes, but rather to ensure that, in designing their projects, applicants for Federal funds address equity concerns that may affect the ability of certain potential beneficiaries to fully participate in the project and to achieve to high standards. Consistent with program requirements and its approved application, an applicant may use the Federal funds awarded to it to eliminate barriers it identifies.

### What are Examples of How an Applicant Might Satisfy the Requirement of This Provision?

The following examples may help illustrate how an applicant may comply with Section 427.

- (1) An applicant that proposes to carry out an adult literacy project serving, among others, adults with limited English proficiency, might describe in its application how it intends to distribute a brochure about the proposed project to such potential participants in their native language.
- (2) An applicant that proposes to develop instructional materials for classroom use might describe how it will make the materials available on audio tape or in braille for students who are blind.
- (3) An applicant that proposes to carry out a model science program for secondary students and is concerned that girls may be less likely than boys to enroll in the course, might indicate how it intends to conduct "outreach" efforts to girls, to encourage their enrollment.

We recognize that many applicants may already be implementing effective steps to ensure equity of access and participation in their grant programs, and we appreciate your cooperation in responding to the requirements of this provision.

### Estimated Burden Statement for GEPA Requirements

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless such collection displays a valid OMB control number. The valid OMB control number for this information collection is 1890-0007. The time required to complete this information collection is estimated to average 1.5 hours per response, including the time to review instructions, search existing data resources, gather the data needed, and complete and review the information collection. **If you have any comments concerning the accuracy of the time estimate(s) or suggestions for improving this form, please write to:** Director, Grants Policy and Oversight Staff, U.S. Department of Education, 400 Maryland Avenue, SW (Room 3652, GSA Regional Office Building No. 3), Washington, DC 20202-4248.

## Attachment Information

File Name

2204-GEPA\_Req.doc

Mime Type

application/msword

Federal funding from the Charter School Grant Program is used for salaries and benefits of at-will and certified staff. Oregon Department of Education does not discriminate on hiring staff or utilizing presenters and/or consultants

ODE policy prohibits discrimination against any person, charter school, public school, local education agency (LEA), State Board of Education.

At no time will ODE discriminate against any person, charter school public school, LEA or State Board of Education because of gender, race, creed national origin, color disability or age.

ODE will make every reasonable attempt that all charter schools applying for Federal Charter School Grant Funds include in the Request for Proposal the applicable GEPA requirements.

Materials and equipment, staff development and other related programs or services needed to implement and maintain our program are not used nor are they purchased with any knowledge of discrimination.

# Project Narrative

## Abstract Narrative

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## ABSTRACT

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Since the inception of Oregon Charter School Law in 1999, the charter school movement in Oregon has gained momentum. Charter schools have increased from 11 in 2000 to 80 in 2007. The steady growth of charter schools is due in large part to the Oregon Charter School Program (OCSP). The long-term objectives of the program are to increase the number of high quality charter schools in Oregon that meet the needs of diverse learners and increase student achievement in meeting rigorous academic state standards. In meeting the national Charter School Program purpose, OCSP awards sub-grants to charter school developers for planning, program design, and initial implementation of charter schools. The OCSP evaluates the effects of these charter schools on students, student academic achievement, staff, and parents on a continuous basis. CSP also identifies charter schools' best and promising practices in meeting the needs of diverse learners and awarding sub-grants to support the dissemination of these practices. This quality information will be valuable for future research and implementation of high quality charter schools in Oregon and across the country. OCSP expects to support the development of 30 new quality charter schools and fifteen dissemination projects over the next three years.

# Project Narrative

## Project Narrative

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**Project Narrative**

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**CFDA #84.282A**

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## **I. Competitive Preference Priorities**

The Oregon Department of Education (ODE) Charter School Grant Program meets priorities 1 through 5 as described below.

### Priority 1: Secondary Schools

According to the Oregon Statewide Report Card 2006-2007, only 55% of all Oregon students met grade 10 reading standards and 45% met math standards. Nearly 60% of African American and Latino students did not meet these same 10<sup>th</sup> grade reading and math benchmarks. It was also reported that the overall dropout rate was 4.1%. The majority of dropouts were from minority and low income student groups. In response, Susan Castillo, Superintendent of Public Instruction in Oregon, identified the following as top instructional priorities for Oregon: 1) closing the achievement gap; 2) improving literacy for all students, with an emphasis on secondary students; and 3) improving student performance in middle schools and high schools.

On January 18th, 2007, the State Board of Education adopted new Oregon high school diploma requirements. Students will be required to take more rigorous coursework and higher levels of math, science and career technical skills in order to receive a diploma. These new requirements will ensure that high school graduates are better prepared for work, higher education or training, life and citizenship.

In alignment with the Superintendent's priorities and the new diploma requirements, the Oregon Department of Education Charter School Program (OCSP) has prioritized the improvement of the academic achievement of secondary school students who are at greatest risk of not meeting state standards and not completing high school. Research has found that smaller schools and class sizes can have beneficial effects for high school students, such as lower drop-out rates and higher grade point averages. The average charter school in Oregon has under 100

students enrolled which is much lower than the larger high schools that enroll 400+ students. Typically much smaller than traditional public schools and freed from bureaucratic constraints, many charter schools allow for a level of innovation and personalization needed to help students being left behind. ORS 338.015 states, “It is the intent of this chapter that new types of schools, called public charter schools, be created as a legitimate avenue for parents, educators and community members to take responsible risks to create new, innovative and more flexible ways of educating children within the public school system.”

Oregon currently has 33 charter schools in operation that serve high school students. Of these, 18 (55%) identify “serving at-risk students” as a focus in their mission statement. The academic achievement of students in charter schools has been mixed. In 1999, the Oregon Legislature authored ORS 329.105 requiring the Department of Education to rate schools in the areas of student performance, student behavior, and school characteristics and to assign an overall rating. This overall rating is based on student performance (two-year average of Oregon state-wide assessment scores in math and English/Language Arts), student behavior (attendance), improvement in achievement and attendance over the previous four years, and participation in Oregon’s statewide assessments in the previous year. Table 1 contains the 2006/07 AYP and State Report Card ratings for charter schools serving secondary students in Oregon. Seven of 33 charter schools serving secondary students received Oregon School Report Cards with ratings of Satisfactory or higher. Three received ratings below. The remaining 23 schools were not rated as a result of a lack of three-year data or having no enrolled students at testing grades, both of which are required to receive an overall rating. Of the 25 charter schools reporting drop-out information in 2005-2006, 13 had a lower rate than the state average and 12 had a higher rate.

**Table 1: 2006-07 AYP and State Report Card Rating**

<b>Charter School</b>	<b>Grade Range</b>	<b>AYP Rating</b>	<b>State Report Card Rating</b>
Armadillo Technical Institute	6-12	NOT MET	UNACCEPTABLE
Arts & Technology Charter High School	9-11	NOT RATED	NOT RATED
Blue Mountain Charter School	K-12	NOT MET	NOT RATED
Camas Valley School	K-12	MET	SATISFACTORY
Child's Way Charter School	6-12	NOT MET	NOT RATED
Clackamas Middle College	11-12	NOT MET	NOT RATED
Clackamas Web Academy	K-12	NOT RATED	NOT RATED
Columbia County Education Campus	7-12	NOT MET	NOT RATED
Days Creek Charter School	7-12	NOT MET	LOW
Douglas Avenue Alternative Learning Sch.	7-12	NOT MET	NOT RATED
Eddyville Charter School	K-12	MET	STRONG
International School of the Cascades	9-12	NOT RATED	NOT RATED
Ione Community School	K-12	MET	STRONG
Lincoln City Career Tech High School	9-12	NOT MET	NOT RATED
Milwaukie Academy of the Arts	9-10	NOT RATED	NOT RATED
Morrison Campus Alternative Program	9-12	NOT MET	NOT RATED
Network Charter School	6-12	NOT MET	NOT RATED
New Urban High School	9-12	NOT MET	LOW
Nixyaawii Community School	9-12	NOT MET	NOT RATED
North Columbia Academy	9-12	NOT MET	NOT RATED

<b>Charter School</b>	<b>Grade Range</b>	<b>AYP Rating</b>	<b>State Report Card Rating</b>
Oregon Coast Technology School	6-12	MET	STRONG
Oregon Connections Academy	K-9	NOT RATED	NOT RATED
Oregon Virtual School	9-12	NOT RATED	NOT RATED
Paisley School	P-12	MET	NOT RATED
Resource Link Charter School	5-12	NOT MET	NOT RATED
Riddle Education Center	7-12	NOT MET	NOT RATED
Sand Ridge Charter School	K-12	MET	STRONG
Sheridan Japanese School	4-12	MET	EXCEPTIONAL
Technology Learning Center	K-12	NOT MET	NOT RATED
The Phoenix School	7-12	NOT RATED	NOT RATED
Trillium	K-11	MET	SATISFACTORY
West Lane Tech Learning Center	9-12	NOT MET	NOT RATED
Willamette Leadership Academy	6-12	NOT MET	NOT RATED

OCSP will build on the successes and address the challenges of charter high schools in Oregon by continuing to fund quality charter schools that serve secondary students through the incentive sub-grant project. The Oregon Incentive Grant application includes a priority that awards extra points for those charter schools that aim to serve at-risk students that are not meeting Oregon’s academic content standards. Applicants must propose to specifically encourage at-risk and underserved students to enroll in their charter school. The Incentive Grant Application specifically states: “Priority will be given to charter school applications that:

1) Emphasize flexible and innovative educational opportunities that will assist at-risk and under-served students to achieve state content and performance standards. 2) Provide parent choice not available in geographic areas, urban or rural, in which a large proportion or number of public schools have been identified for improvement, corrective action or restructuring.”

OCSP will identify best practices for both schools and authorizers and disseminate that information broadly. For example, Superintendent Castillo hosts an annual “Closing the Gap Conference.” OCSP will encourage charter schools (especially those that have received dissemination grants) to not only attend but to present best practices in improving student academic achievement at this state-wide conference. In addition, OCSP will prioritize those charter schools with proven success in serving secondary students at risk for falling behind for dissemination grant awards. This is an important step in disseminating best practices in closing the achievement gap to charter schools but to other public schools as well.

#### Priority 2: Periodic Review and Evaluation

Oregon Revised Statute (ORS) 338.095 (1) requires, “...a public charter school shall report to the sponsor and the State Board of Education at least annually on the performance of the school and its students. The sponsor at least annually shall visit the public charter school site and review the public charter school’s compliance with the terms and provisions of the charter. The public charter school shall have an annual audit of the accounts of the public charter school prepared in accordance with the Municipal Audit Law.”

The public charter school’s annual performance reports, annual audit of accounts and annual site visit and review as required by ORS 338.095 and any other information mutually agreed upon by the public charter school governing body and the sponsor are used in the evaluation for charter renewal. ORS 338.065 states, “The sponsor shall base the charter renewal

decision on a good faith evaluation of whether the public charter school:

- (A) Is in compliance with this chapter and all other applicable state and federal laws;
- (B) Is in compliance with the charter of the public charter school;
- (C) Is meeting or working toward meeting the student performance goals and agreements specified in the charter or any other written agreements between the sponsor and the public charter school governing body;
- (D) Is fiscally stable; and
- (E) Is in compliance with any renewal criteria specified in the charter of the public charter school.”

Charter schools are required to participate in Oregon Assessment of Knowledge and Skills (OAKS), Oregon’s statewide assessment tests. ORS 329.485(1)(a) states, “The Department of Education shall implement statewide a valid and reliable assessment system for all students that meets technical adequacy standards...(2) School district and public charter schools shall implement the statewide assessment system in mathematics, science and English. In addition, school districts and public charter schools may implement the statewide assessment system in history, geography, economics and civics.” Test results are disseminated widely through School Report Cards by ODE, school districts, schools, other websites as well as the media and other avenues to community members, parents and students.

### Priority 3: Number of High-Quality Charter Schools

The charter movement in Oregon has been growing since the legislation of 1999. The number of operational schools has increased each year as seen in the Table 2.

**Table 2: Growth in Charter Schools**

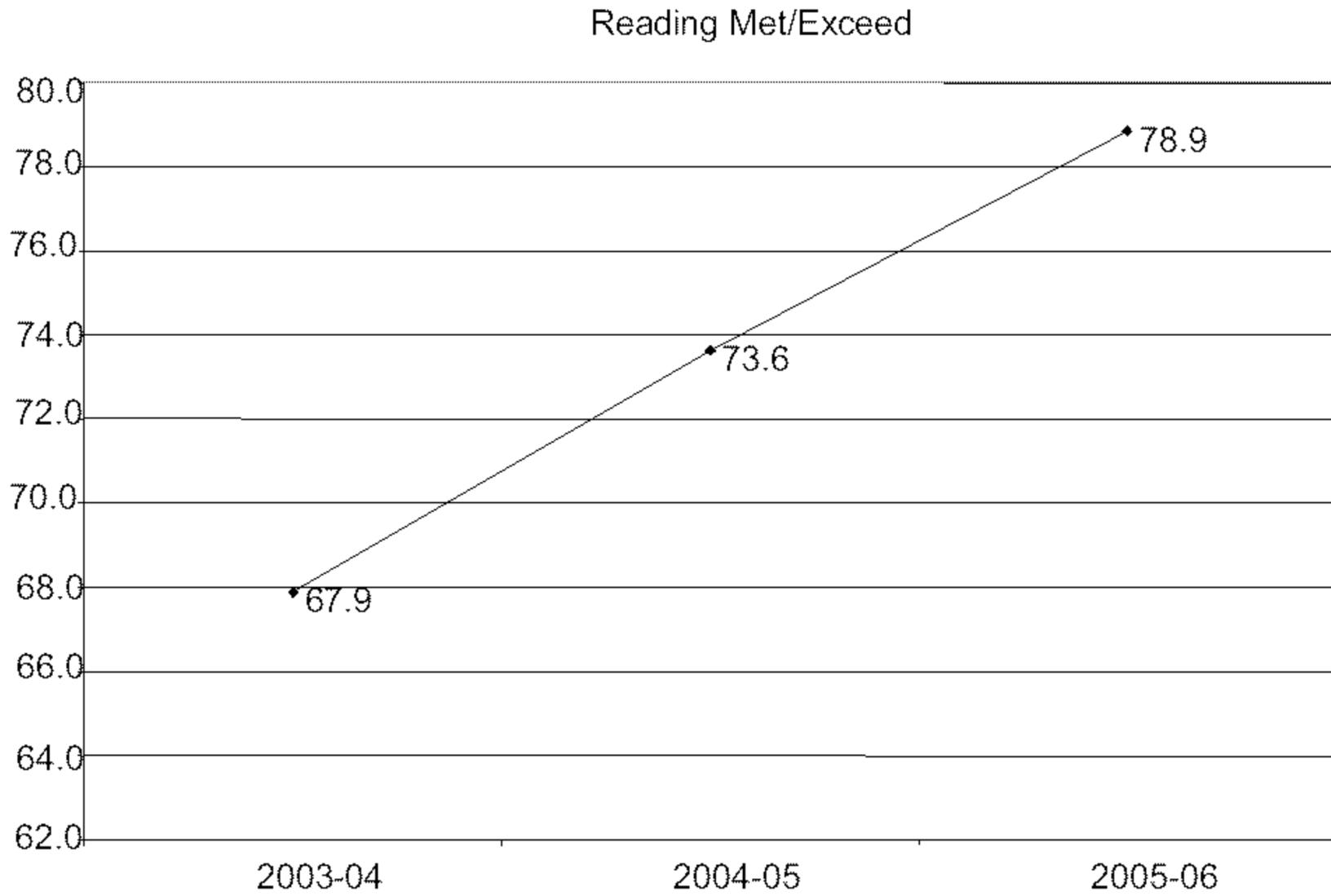
<b>Year</b>	<b>Opened</b>	<b>Closed</b>	<b>Total Operational</b>
<b>2000</b>	11	0	11
<b>2001</b>	7	2	16
<b>2002</b>	11	2	25
<b>2003</b>	18	2	41
<b>2004</b>	17	2	56
<b>2005</b>	14	5	65
<b>2006</b>	8	3	70
<b>2007</b>	12	2	80
<b>Total</b>	98	18	80

A crucial element of high-quality charter schools is accountability. Charter schools are subject to all accountability regulations such as NCLB, IDEA, civil rights, etc. The sponsoring school district is responsible for carrying out the NCLB (Title I, Title II, etc.) accountability provisions as well as elements of IDEA and others. Charter schools are held accountable for AYP just as all other schools. Sponsoring districts may incorporate AYP definition into the charter. The sponsoring district is responsible for ongoing oversight of student academic performance. According to ORS 338.105 (1), "During the term of a charter, the sponsor may terminate the charter on any of the following grounds: (a) failure to meet the terms of an approved charter; (b) failure to meet the requirements for student performance...."

Of the 59 charter schools with participation data available, 38 (65%) schools met the *No Child Left Behind* participation requirement and 21 schools (35%) did not. As charter schools operate over longer periods of time, it is possible to begin a longitudinal study of student achievement. Twenty-seven charter schools had reading and math scores available in 2003-04,

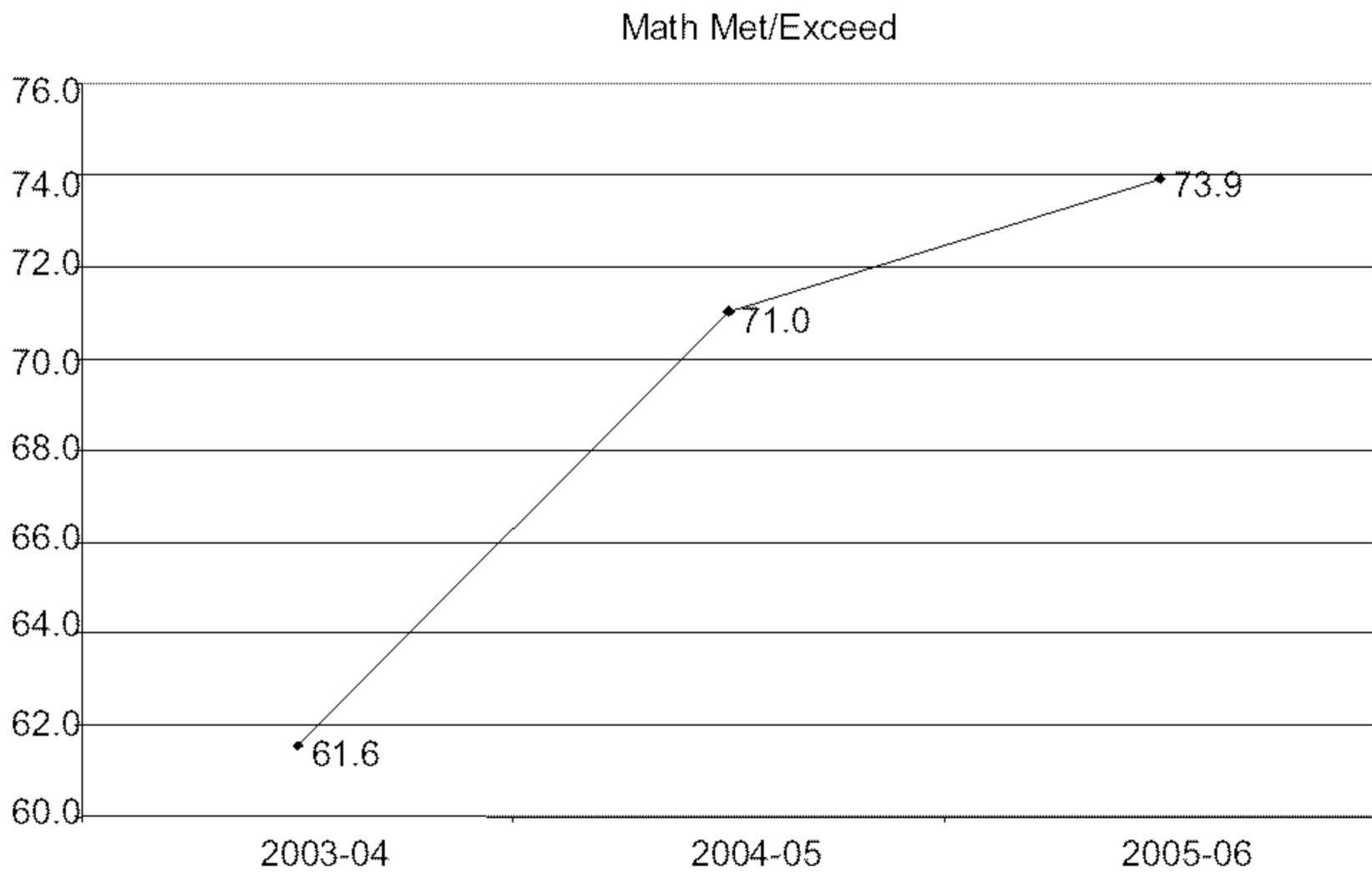
2004-05, and 2005-06. This three-year data show a significant increase in both reading and math achievement based on the average percent of students meeting the standard. In reading, the average percent increased from 68% to 79% (see Figure 1) and in math the average percent increased from 62% to 74% (see Figure 2).

**Figure 1: Percentage of Charter School Students Meeting or Exceeding Reading Scores  
2003/04-2005/06**



**Figure 2: Percentage of Charter School Students Meeting or Exceeding Math**

**Scores 2003/04-2005/06**



Priority 4: One Authorizing Public Charter Agency Other Than LEA or an Appeals Process

The Oregon Charter School statute established a process for creating charter schools, either as new entities, conversions from existing public schools or from existing alternative education programs. The law requires a charter school to be approved and sponsored by the local school district board or by the State Board of Education (SBE). The SBE becomes the sponsor only if the local board has declined to sponsor the charter school and negotiations have failed to bring agreement between the local board and the charter applicant.

A well-articulated appeals process is outlined in the Oregon Revised Statute 338.075 regarding review of school district board decisions. Applicants whose charter school proposal is

not approved may request the State Board of Education to review the decision of the school district board. The SBE will attempt to mediate a resolution. This has proven to be a valuable step in the appeals process. To date, two of 11 initial school district denials have been successfully resolved through mediation and resulted in the local school district sponsoring the charter school.

The SBE may suggest revisions to the proposal. However, if the school district board does not accept the revisions to the proposal, the SBE may become the sponsor if the applicant agrees to sponsorship. Three of 11 school district denials have been approved by the State Board for sponsorship and two continue in operation. The SBE may at any time during the review process, reject a proposal to start a charter school if the school fails to meet the requirements of the law. Further, an applicant may seek judicial review of an order of the State Board of Education. If the SBE decision is not supported by substantial evidence, the court may direct the SBE to sponsor the charter school. One applicant sought a judicial review of the order of the State Board of Education. The State Board of Education was upheld in its decision.

#### Priority 5: High Degree of Autonomy

Autonomy in exchange for accountability is the central theme to the Oregon Charter School Law. ORS 338.115 states, “Statutes and rules that apply to school district boards, school districts or other public schools do not apply to public charter schools.” The law grants charter schools autonomy over daily operation, curriculum, staffing, governance and budget decisions. ORS 329.045 states, “School districts and public charter schools shall maintain control over course content, format, materials and teaching methods.” The importance of charter schools having the ability to create innovative learning opportunities and implement improvements in education is addressed in the intent of the legislation. ORS 338.015 states, “The Legislative

Assembly seeks to create an atmosphere in Oregon’s public school system where research and development of new learning opportunities are actively pursued... It is the intent that public charter schools may serve as models and catalysts for the improvement of other public schools and the public school system.”

Staff assignment to a public charter school is voluntary. The charter school’s governing body controls employee hiring. The "employer" of the public charter school employees may either be the sponsoring entity or the public charter school governing body.

Autonomy is addressed in other areas as well. Charter schools in Oregon must organize as a non-profit organization 501(c)(3) that requires financial accountability independent from the sponsoring school district. ORS 338.115 (8) states, “A public charter school may enter into contracts and may lease facilities and services from a school district, education service district, state institution of higher learning, other governmental unit, or any person or legal entity.” ORS338.115 (10) states, “A public charter school may receive and accept gifts, grants and donations from any source for expenditure to carry out the lawful functions of the school.”

## **II. Application Requirements**

- i) Describe the objectives of the SEA’s charter school grant program.

See Selection Criteria i.

- ii) Describe how the SEA will inform each charter school in the State about Federal funds and programs.

See Selection Criteria iii.

- iii) Describe how the SEA will ensure that each charter school receives their commensurate share of Federal education funds.

See Selection Criteria iii

iv) Describe how the SEA will disseminate best or promising practices of charter schools to each LEA in the state.

See Selection Criteria i.

v) N/A

vi) N/A

vii) Describe how LEAs in which charter schools are located will comply with sections 613(a)(5) and 613(e)(1)(B) of the Individuals with Disabilities Education Act.

See Selection Criteria ii.

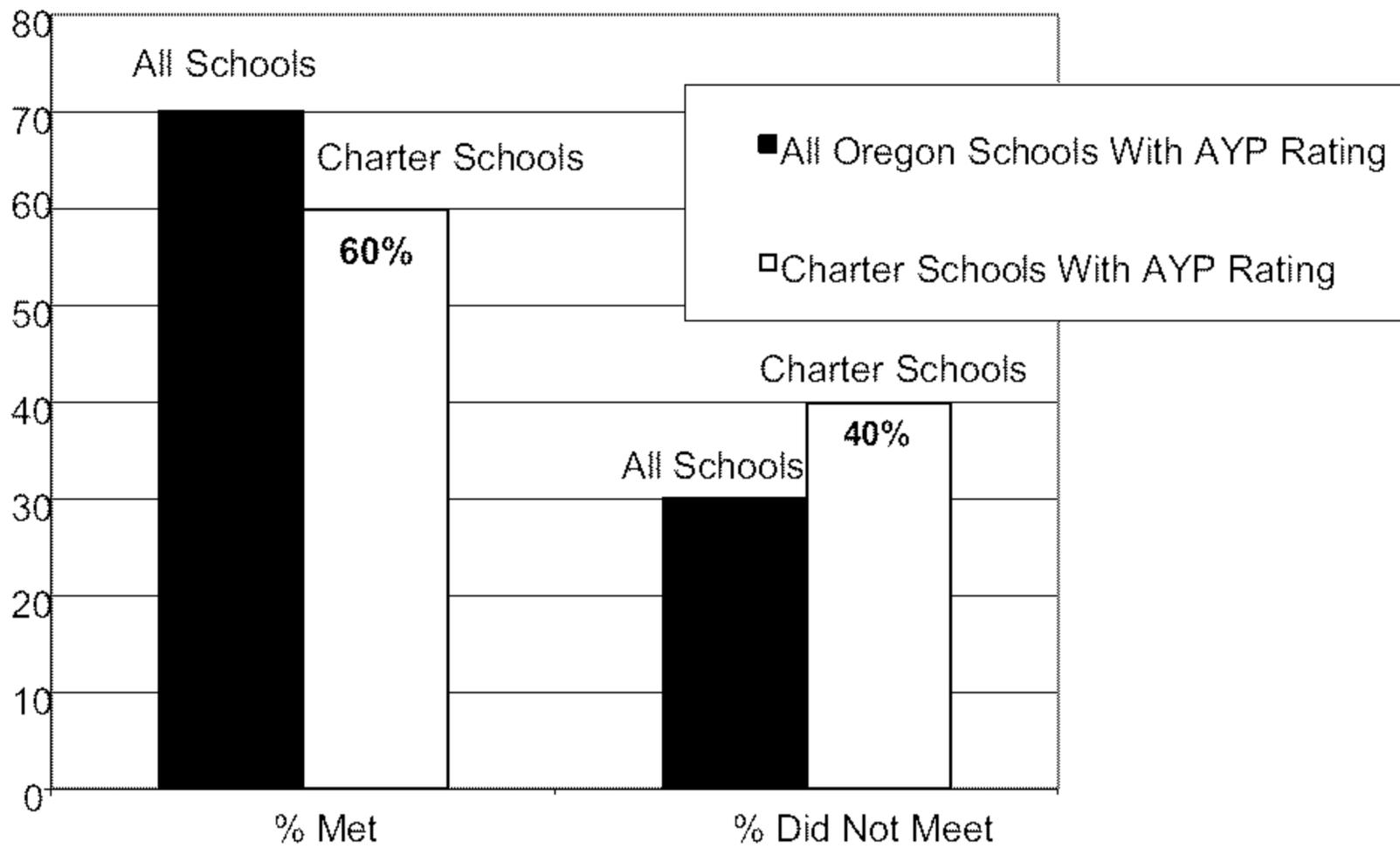
### **III. Selection Criteria**

#### **i. Assisting educationally disadvantaged and other students to achieve State academic content standards and state student academic achievement standards.**

ORS 329.045 states, "School districts and public charter schools shall offer students instruction in mathematics, science, English, history, geography, economics, civics, physical education, health, the arts and second languages that meets the academic content standards adopted by the State Board of Education and meets the requirements adopted by the State Board of Education and the board of the school district or public charter school." Further, ORS 329.485 (2) states, "School districts and public charter schools shall implement the statewide assessment system in mathematics, science and English. In addition, school districts and public charter schools may implement the statewide assessment system in history, geography, economics and civics." However, Oregon School Report Cards and AYP reports include student academic achievement rates in mathematics and English/Language Arts only.

As demonstrated in Figure 3, AYP ratings indicate lower performance levels for charter schools than traditional schools. However, most charter schools that received a *Not Met* designation specifically targeted at-risk youth in their marketing efforts. Additionally, charter schools that tested fewer than 95% of their students would be deemed as *Did Not Meet*. Since this information provides one snapshot of achievement, it is prudent to examine additional sources of data regarding student and school progress.

**Figure 3: 2006-07 AYP Ratings**



The distribution of ratings for the twenty-two charter schools (35% of all charter schools) receiving a State Report Card rating is shown in Table 3. Nineteen received a rating of Satisfactory or higher. Three were rated below. The lack of an overall rating for the remaining charter schools is due to the lack of longitudinal (at least three years) data or of enrolled students at the testing grades, both of which are needed to receive an overall rating.

**Table 3: 2006 Oregon Report Card Distribution of Ratings for Charter Schools**

<b>RATINGS</b>	Exceptional	Strong	Satisfactory	Low	Unacceptable	<b>Total</b>
<b>NUMBER</b>	4	8	7	2	1	<b>22</b>

Table 4 provides 2005-06 state achievement data for 64 charter schools which was used to determine the 2006-07 state report card and AYP ratings. Please note that \*\* indicates the data were suppressed to protect student confidentiality and NTG means *No Testing Grade* at the school. Percentages shown in **Bold** indicate that the charter school's percentage was higher than the state average for that content area when compared with similar grade levels tested.

**Table 4: 2005-06 State Assessment Data**

<b>Charter School</b>	<b>Reading % Met/Exceed</b>	<b>Math % Met/Exceed</b>	<b>Writing % Met/Exceed</b>	<b>Science % Met/Exceed</b>
Armadillo Technical Institute	37%	26%	<b>57%</b>	46%
Arthur Academy	<b>&gt; 95%</b>	78%	42%	NTG
Arts & Technology Charter HS	<b>82%</b>	<b>63%</b>	<b>74%</b>	59%
Baker Charter School	NTG	NTG	NTG	NTG
Bethany Charter School	65%	64%	26%	65%
Blue Mountain Charter School	67%	67%	**	**
Camas Valley School	61%	56%	35%	48%
Child's Way Charter School	48%	<b>71%</b>	36%	<b>81%</b>
City View Charter School	<b>93%</b>	<b>88%</b>	<b>63%</b>	**
Clackamas Middle College	NTG	NTG	NTG	NTG
Clackamas Web Academy	<b>76%</b>	57%	<b>54%</b>	64%
CM2 Opal School	<b>98%</b>	75%	NTG	NTG

<b>Charter School</b>	<b>Reading % Met/Exceed</b>	<b>Math % Met/Exceed</b>	<b>Writing % Met/Exceed</b>	<b>Science % Met/Exceed</b>
Columbia County Education Campus	30%	7%	**	31%
Days Creek Charter School	48%	43%	41%	50%
Deschutes Edge Charter School	<b>76%</b>	<b>78%</b>	39%	<b>78%</b>
Douglas Avenue Alternative Learning Sch.	**	**	**	**
Eddyville Charter School	<b>82%</b>	<b>75%</b>	31%	<b>86%</b>
Four Rivers Community School	NTG	NTG	NTG	NTG
Howard Street Charter School	<b>76%</b>	<b>73%</b>	<b>56%</b>	<b>72%</b>
International School of the Cascades	<b>&gt; 95%</b>	<b>93%</b>	<b>89%</b>	<b>89%</b>
Ione Community School	<b>81%</b>	<b>76%</b>	43%	62%
Jane Goodall Environmental MS	<b>94%</b>	<b>92%</b>	<b>65%</b>	<b>93%</b>
Kings Valley Charter School	<b>83%</b>	<b>84%</b>	16%	67%
Lighthouse School	<b>93%</b>	<b>90%</b>	<b>50%</b>	<b>82%</b>
Lincoln City Career Tech HS	43%	21%	36%	36%
Lourdes School	<b>90%</b>	<b>90%</b>	<b>&gt; 95%</b>	67%
Luckiamute Valley Charter School	67%	66%	14%	53%
Milwaukie Academy of the Arts	<b>73%</b>	<b>74%</b>	<b>88%</b>	<b>79%</b>
MITCH Charter School	<b>92%</b>	<b>&gt; 95%</b>	<b>71%</b>	<b>80%</b>
MITCH Sherwood Charter School	NTG	NTG	NTG	NTG

<b>Charter School</b>	<b>Reading % Met/Exceed</b>	<b>Math % Met/Exceed</b>	<b>Writing % Met/Exceed</b>	<b>Science % Met/Exceed</b>
Morrison Campus Alternative Prg.	17%	32%	24%	33%
Mosier Community School	77%	79%	<b>46%</b>	<b>&gt;95%</b>
Multisensory Learning Academy	84%	82%	33%	<b>87%</b>
Network Charter School	63%	58%	<b>60%</b>	<b>68%</b>
New Urban High School	38%	26%	48%	39%
Nixyaawii Community School	5%	11%	< 5%	22%
North Columbia Academy	13%	29%	< 5%	38%
Optimum Learning Environments	<b>92%</b>	<b>95%</b>	<b>52%</b>	<b>&gt;95%</b>
Oregon Coast Technology School	<b>88%</b>	<b>79%</b>	40%	<b>89%</b>
Oregon Connections Academy	<b>84%</b>	71%	40%	<b>74%</b>
Oregon Virtual School	**	**	**	**
Paisley School	<b>94%</b>	<b>85%</b>	<b>65%</b>	<b>93%</b>
Portland Arthur Academy Charter	**	**	**	**
REALMS Middle School	<b>79%</b>	68%	29%	<b>68%</b>
Resource Link Charter School	54%	15%	<b>57%</b>	60%
Reynolds Arthur Academy	83%	56%	NTG	NTG
Riddle Education Center	33%	47%	**	39%
Ridgeline Montessori	<b>88%</b>	<b>85%</b>	34%	<b>&gt;95%</b>
Sand Ridge Charter School	<b>91%</b>	<b>87%</b>	<b>62%</b>	<b>62%</b>
Self Enhancement Inc SEI Acad.	66%	62%	32%	NTG
Sheridan Japanese School	<b>&gt; 95%</b>	<b>&gt; 95%</b>	<b>73%</b>	<b>93%</b>

<b>Charter School</b>	<b>Reading % Met/Exceed</b>	<b>Math % Met/Exceed</b>	<b>Writing % Met/Exceed</b>	<b>Science % Met/Exceed</b>
Siletz Valley School	93%	> 95%	38%	>95%
South Columbia Family School	90%	90%	63%	89%
Technology Learning Center	**	**	**	**
The Emerson School	84%	79%	35%	78%
The Phoenix School	10%	10%	18%	14%
Three Rivers Charter School	98%	> 95%	74%	>95%
Trillium	68%	67%	31%	69%
Upper Chetco Charter School	**	**	**	**
Victory Middle School	39%	39%	13%	**
Village School	91%	89%	36%	92%
West Lane Tech Learning Center	42%	11%	21%	47%
Willamette Leadership Academy	38%	30%	26%	53%
Woodburn Arthur Academy	71%	57%	NTG	NTG
<b>Total Number of Schools Above State Average</b>	<b>28</b>	<b>24</b>	<b>20</b>	<b>24</b>

Many high school students believe that getting into college is the "hard part," when, in fact, *completing* college is often the more difficult achievement. The Oregon University System reports that nearly 75% of Oregon's high school graduates go to some form of postsecondary school within one year of graduation. However, 75% of new freshman in Oregon Universities will need remedial math or English classes and only 55.5% of enrolled freshmen will complete a

bachelor's degree within six years of enrollment. These rates are even lower for ethnic minorities and students from low-income families. The Oregon Department of Education conducted an unprecedented public engagement process on the details of the State Board of Education's proposal to increase Oregon's high school graduation requirements. The process led to a January 2007 vote by the State Board of Education to increase Oregon's graduation requirements in order to better prepare Oregon high school students for college and the workforce. Students will be required to take more rigorous coursework and higher levels of math, science and career technical skills in order to receive a diploma. The changes to the diploma will be phased in over the coming seven years. Charter schools are in a unique position to contribute to this effort by providing opportunities for innovative teaching and learning methods in small school environments. In addition, charter schools may be able to offer the personalized attention and instruction that will be needed for those high school students who are already struggling to meet academic standards.

Oregon's charter school law reinforces the emphasis on improving education for all students. ORS 338.015 states: "It is the intent of this chapter that new types of schools, called public charter schools, be created as a legitimate avenue for parents, educators and community members to take responsible risks to create new, innovative and more flexible ways of educating children within the public school system."

In addition to this overall commitment to providing education for all students, ORS 338.185 (2) specifically states that the Department of Education will give priority for awarding grants to those charter schools serving at-risk youth. The Oregon Charter School Program Incentive Grant application has a separate priority that asks developers to "describe the innovative educational opportunities for students, especially those not meeting OR exceeding all

of Oregon’s rigorous academic content standards and the outreach planned to encourage at-risk and under served students to enroll in the charter school.” Each applicant must present a detailed plan describing how their school will add value to the local educational community, specifically to those students who have “fallen through the cracks.”

The application also requires applicants to describe the methods by which the charter school will define, measure and demonstrate success, using both academic and non-academic objectives. OCSP provides technical assistance for charter school developers in developing measurable student academic performance objectives. As the new diploma requirements are phased in, charter schools in Oregon will need to have a strong academic plan to help students (especially those that are at-risk) to successfully complete these new credit requirements, demonstrate proficiency in essential skills, and meet the personalized learning requirements. OCSP will serve an essential role in this area by providing technical assistance and ensuring charter schools are receiving the same district technical assistance as other public schools.

The vision of the Oregon Department of Education Charter School Grant Program is to support high-quality charter schools that are consistent with the purposes set forth in ORS 338.015:

- Increase student learning and achievement;
- Increase choices of learning opportunities for students;
- Better meet individual student academic needs and interest;
- Build stronger working relationships among educators, parents, and other community members;
- Encourage the use of different and innovative learning methods;

- Provide opportunities in small learning environments for flexibility and innovation, which may be applied, if proven effective, to other public schools;
- Create new professional opportunities for teachers;
- Establish different forms of accountability for schools;
- Create innovative measurement tools.

The objectives and activities of the Oregon Department of Education Charter School Program are in alignment with the overall purposes identified above:

**Objective 1:** Increase the number of high quality charter schools in Oregon.

Methods: 1) Implement the Incentive Grant RFP and award process twice each year. 2) Provide one-on-one technical assistance and workshops on components of high quality charter proposals and start-up logistics for charter school developers and sponsors. 3) Monitor Incentive grantees and provide sound feedback. 4) Mediate declined charters as needed.

**Objective 2:** Promote the dissemination of Oregon charter school best and promising practices to other public schools and LEAs for implementation.

Methods: 1) Work with charter organizations, school districts and other partners to identify charter schools with best practices. 2) Implement Dissemination Grant RFP technical assistance and award process once per year. 3) Provide one-on-one technical assistance and dissemination grant writing workshops. 4) Publicize charter school successes and best practices broadly.

**Objective 3:** Support Oregon charter schools to be fiscally solvent and to incorporate sound leadership practices for long-term sustainability.

Methods: 1) Increase sound governance practices through ongoing technical assistance and workshops on leadership and fiscal responsibility for charter school operators. 2) Provide constructive review (site visits, review of audits and progress reports) and provide specific recommendations for improvement. 3) Partner with the Oregon School Boards Association in providing technical assistance for authorizers on their role in monitoring and supporting fiscal responsibility of charter schools.

**Objective 4:** Prepare and support charter schools to increase the academic achievement and graduation rates of secondary school students who are at greatest risk of not meeting state standards and not completing high school.

Methods: 1) Prioritize secondary schools for incentive grant funding. 2) Provide technical assistance for closing the achievement gap. 3) Prioritize schools serving secondary students for dissemination grants. 4) Partner high performing charter schools with those charter schools that are struggling for technical assistance.

**Objective 5:** Assist charter schools to incorporate new and innovative learning methods while also increasing rigor to meet the challenging needs of new Oregon diploma requirements.

Methods: 1) Partner with ODE offices in providing information and technical assistance to charter schools on meeting new graduation requirements. 2) Emphasize flexibility and innovation in incentive grant RFP announcements. 3) Fund dissemination projects with proven techniques for improving student academic achievement. 4) Support charter schools in developing comprehensive academic plans to increase rigor and meet new graduation requirements.

In response to CSP's shift to outcomes-oriented evaluation, the Oregon Department of Education Charter School Program has structured its performance measures and developed a logic model that best represents the inputs, activities, outputs, and intended outcomes of the program. The model graphically demonstrates how the OCSP projects and activities function together to accomplish the program's purpose (Figure 4).

OCSP identified four short term outcomes that focus on improvements to the knowledge and awareness of charter school developers, operators, other educators and community members. These short-term outcomes (e.g. increase knowledge and awareness of best practices; increase knowledge of charter school start-up logistics and operation; increase knowledge of governance and fiscal responsibility; and increase knowledge and awareness of new Oregon high school diploma requirements) are predicted to contribute to changes to the intermediate and long-term outcomes over time. Anticipated intermediate outcomes include changes in behavior, practice or policy at the person or systems level. These include implementation of charter school best practices, increased sustainability of operating charter schools and comprehensive planning for increased rigor to meet changing Oregon graduation requirements. These intermediate outcomes in turn will lead to the long-term outcomes of improved student academic achievement and an increase in the number of quality charter schools that are operational in Oregon.

In terms of activities, the logic model portrays the four primary activity groupings for the OCSP: 1) dissemination sub-grant program, 2) OCSP outreach; 3) technical assistance; 4) incentive sub-grant awards program. A full description of activities is included throughout this proposal.

**Figure 4: Oregon Charter School Program Logic Model**

INPUTS	ACTIVITIES (Main)	OUTPUTS	SHORT TERM OUTCOMES	MEDIUM TERM OUTCOMES	LONG TERM OUTCOMES
Staff Partnerships Funding Technology Materials Space Supplies	Dissemination Subgrant Prog. OCSP Outreach/ Marketing Incentive Subgrant Prog. Technical Assistance and Monitoring	<i>Number of:</i> -Charter schools with best practices identified -Dissemination grants awarded -Incentive grants awarded -Incentive and dissemination grants awarded to secondary schools -Marketing activities -TA Workshops -Participants at workshops -TA Phone -Site Visits	-Increase knowledge and awareness of best practices -Increase knowledge of charter school start-up logistics and operation -Increase knowledge of governance and fiscal responsibility -Increase awareness of new Oregon HS diploma requirements	Implementation of best practices -Increase sustainability of charter schools/ decrease in closures -Development of comprehensive academic plans to increase rigor and meet new graduation requirements	Increase in the number of high quality charter schools in Oregon  Increase in student academic achievement

OCSP informs teachers, parents and communities of the program through a number of outreach methods. One of the primary tools for disseminating information about the OCSP is the ODE website. The ODE site is the primary vehicle for information delivery for the Oregon Department of Education. The OCSP section of the site ([www.ode.state.or.us/go/charterschools](http://www.ode.state.or.us/go/charterschools)) contains technical assistance information such as the Charter School Handbook, Application Proposal Checklist and Flowchart as well as general charter school information and resources. The site is updated regularly. The site address and link are included on all department correspondence and educational materials. In addition to the website, OCSP will continue to seek media coverage for charter school successes. The media have been very responsive to stories of charter school successes. OCSP will also submit newsletter articles and updates in our partners' newsletters and websites. Examples are the Superintendent's Pipeline (a monthly communication sent out to all school districts by the Department), and working with the Oregon School Board Association's publications and website.

Oregon charter schools have been in existence for seven years and data is now available for dissemination to LEAs across the state. OCSP will actively publicize charter school successes as a means to target and increase LEA attendance at the annual Leadership Conference and charter school dissemination events/activities. OCSP is going to take the lead in partnering with other educational agencies such as the Oregon School Boards Association and the Confederation of School Administrators as channels of charter school information dissemination across the state.

**ii. The degree of flexibility afforded by the SEA to charter schools under the State's charter school law.**

The concept of flexibility is identified in the legislative intent of Oregon's charter school law. ORS 338.015 states, "It is the intent of this chapter that new types of schools, called public charter schools, be created as a legitimate avenue for parents, educators and community members to take responsible risks to create new, innovative and more flexible ways of educating children within the public school system."

Oregon's charter law establishes an administrative relationship between the charter school and the authorized public charter agency (either the school district in which the public charter school is located or the State Board of Education) that centers on the charter agreement. ORS 338.065 states, "The sponsor and applicant shall develop a written charter that contains the provisions of the proposal that have been duly approved by the sponsor and public charter school governing body... The charter, when duly executed by the sponsor and the public charter school governing body, shall act as the legal authorization for the establishment of the public charter school. The charter shall be legally binding on both the sponsor and the public charter school governing body."

Oregon's charter law exempts charter schools from significant State and local rules that inhibit the flexible operation and management of public schools. ORS 338.115 states, "Statutes and rules that apply to school district boards, school districts or other public schools do not apply to public charter schools."

The law grants charter school developers autonomy over daily operation, curriculum, staffing, governance and budget decisions. ORS 329.045 states, "School districts and public charter schools shall maintain control over course content, format, materials and teaching

methods.” In addition, ORS 338.025 (2) states, “The State Board of Education may grant a waiver of any provision of ORS338 if the waiver promotes the development of programs by providers, enhances the equitable access by underserved families to the public education of their choice, extends the equitable access to public support by all students or permits high quality programs of unusual cost.” The State Board, with few exceptions, has granted each waiver that has been requested. However, the law contains a list of “unwaivables” (e.g., statutes, rules, local policies and agreements relating to health and safety, constitutional rights, participation of all students in the Oregon Assessment System and content standards). A charter school’s admissions practices must also comply with Part B of the Individuals with Disabilities Education Act and Federal civil rights laws, including, but not limited to, Title VI of the Civil Rights Act of 1964; Section 504 of the Rehabilitation Act of 1973; and Title II of the Americans with Disabilities Act of 1990, as applicable. In addition, at least fifty percent of the total instructional and administrative FTE (full time equivalency) must be licensed teachers and/or administrators. The other fifty percent must be registered by the Teacher Standards and Practices Commission.

In Oregon, a public charter school is considered a school within the local school district. A charter school and the school district specify details of how special education services will be provided in the agreed upon charter document. However, the resident school district (home district for student with a disability) is responsible for providing any required special education and related services to public charter school students identified as students with disabilities under the IDEA. The resident school district’s responsibility to provide a free appropriate public education is the same for children with disabilities in public charter schools as for other children with disabilities attending other public schools in the district. Federal IDEA funds are distributed

to the school district designated as responsible for the provision of special education and related services or a Free Appropriate Public Education (FAPE). In Oregon, this is the resident school district of the student with disabilities.

Charter schools in Oregon are afforded a high degree of autonomy over their budgets and expenditures. They must organize as a non-profit organization 501(c)(3), that requires financial accountability independent from the sponsoring school district. ORS 338.025 (8) states, “A public charter school may enter into contracts and may lease facilities and services from a school district, education service district, state institution of higher learning, other governmental unit, or any person or legal entity.” Further, ORS 338.025 (10) states, “A public charter school may receive and accept gifts, grants, and donations from any source for expenditure to carry out the lawful functions of the school.”

Although each charter school’s budget is initially reviewed carefully by the sponsoring school district and timely reports are required, budgetary decisions are made entirely at the discretion of the charter school. State school funding flows from the state through the district to the charter school. By Oregon charter school law, the funding level is negotiable in the charter, but can be no less than 80% of the General Purpose Grant per weighted average daily membership (ADMw) for students in grades K-8, and no less than 95% of that figure for students in grades 9-12. For most charter schools, these are the rates set in the charter contract. By law, the sponsoring district must send the agreed upon payment to the charter school within 10 days after receiving payments from the State School Fund.

**iii. The number of high-quality charter schools to be created in the State.**

As of fall 2007, eighty charter schools serving 11,000 students were in operation across Oregon. Since the enactment of Oregon’s Charter School legislation in 1999, the total number of quality charter school in Oregon has increased. See Table 5.

**Table 5: Number of Charter Schools Open Each Year**

<b>Year</b>	<b>Opened</b>	<b>Closed</b>	<b>Total Operational</b>
<b>2000</b>	11	0	11
<b>2001</b>	7	2	16
<b>2002</b>	11	2	25
<b>2003</b>	18	2	41
<b>2004</b>	17	2	56
<b>2005</b>	14	5	65
<b>2006</b>	8	3	70
<b>2007</b>	12	2	80
<b>Total</b>	98	18	80

Charter school enrollment has continued to grow since 1999. However, overall charter schools still remain smaller than traditional public schools, which average over 300 students. There is no cap on the number of charter schools permitted in Oregon. Based on these trends, Oregon projects approximately 10 new charter schools to be authorized and opened each year of the grant for a total of 110 charter schools with approximately 20,000 students by 2011.

In support of this outcome, OCSP will conduct outreach to inform teachers, parents, community, and LEAs about the Oregon Charter School Incentive Grant Program through ODE website updates, media coverage, Superintendent’s Pipeline newsletter articles, Oregon School

Board Association and other partners' publications and websites. Staff will present at statewide conferences such as the Leadership Conference.

The charter school incentive grant process will include updating and distributing the Charter School Incentive Grant RFP to charter school developers, implementing a peer review process to score applications to ensure quality, and awarding grants. Technical assistance is provided to charter school developers in this process through charter school start-up workshops, charter school incentive grant writing workshops, charter school incentive grant project director's meetings, and individual start-up and implementation technical assistance.

Between 1999 and 2006, Oregon had 78 charter schools opened and 16 closed through the termination of their contract or non-renewal of the contract. This represents 20% of the charter schools in Oregon (the national average is 11%). Almost all closures were due to financial management issues. Technical assistance activities targeting both authorizers and charter schools on leadership and financial management is an important component to assisting charter schools and sponsors to develop the working relationships that are needed to create, open, implement and sustain a high quality charter school. The charter school movement in Oregon is somewhat unique in that the final charter school bill was supported by both the Oregon School Boards Association and the Confederation of Oregon School Administrators. This support has laid the initial groundwork for a collaborative relationship between charter schools and school districts. However, collaboration is not always the case.

There are a number of organizations in Oregon that provide technical assistance to charter schools and authorizers. These include: Charter School Support Center, Charter Starters, and Charter School Development Center-Oregon. The ODE charter school webpage provides a wide array of technical assistance as well. The website contains information and training on

incentive and dissemination grant processes and requirements. OCSP has developed a Charter School Handbook that provides an excellent overview of how to start and implement a charter school. Examples of topics include funding, governance, teacher licensure, special education and renewal issues.

OCSP will provide in-depth technical assistance on financial management, governance meeting special education rules and other regulatory concerns. OCSP will continue to offer ongoing technical assistance for authorizers through one-on-one contacts and biannual District Forums where district representatives are given an opportunity to ask questions and discuss current topics such as understanding their role in charter contracting, accountability and monitoring. At least two technical assistance workshops on financial management and leadership will be provided for charter schools each year. OCSP reviews each charter school's annual performance reports, audits and grant progress reports. Staff conduct site visits to each school and provide technical assistance and specific recommendations for improvement.

By partnering with the Oregon School Board Association, OCSP also plans to identify and disseminate best practices for authorizers based on the experiences of previous school districts in Oregon who have been through the charter process. OCSP will also provide a one-year membership to the National Association of Charter School Authorizers for first time sponsoring districts as a means of supporting their professional development.

Oregon charter schools are eligible for the same Federal services regular public schools receive, including No Child Left Behind services and Child Nutrition Programs. School districts are advised of this through District Forums and federal monitoring of school districts. Charter schools and authorizers are notified of the availability of such opportunities through conferences

and technical assistance activities. OCSP specifically informs charter schools and authorizers of these opportunities by:

- Including information on federal funds and programs in the Oregon Public Charter School Handbook, emails to operators, conferences and workshops;
- Providing regular updates on the ODE Charter School website, [www.ode.state.or.us](http://www.ode.state.or.us);
- Providing information to partners in the state for web posting and dissemination;
- Continuing to require school districts to sign an assurance stating charter schools in their districts have been informed of and included in any district application for federal funds and programs.

Important to the opening of new charter schools is ensuring that each charter school receives the school's commensurate share of Federal education funds that are allocated by formula each year, including during the first year of operation of the school and during a year in which the school's enrollment expands significantly. It is the responsibility of the entire Department to work collaboratively to ensure Oregon's public charter schools receive their commensurate share of federal funds.

Newly created charter schools are often not in a position to identify their enrollment of children identified as living in poverty until on or near the date when the school actually opens for the first time. The U. S. Department of Education encourages "school districts to allow public charter schools as much leeway as possible with respect to deadlines for submitting data." The Charter School Expansion Act of 1998 (CSEA) was incorporated into the NCLB Act in Title V, Part B, Subpart 1 which allows charter schools an important tool to ensure they receive the full amount of federal funds to which they are entitled. However, charter schools must follow certain procedures in order to trigger the protections provided by this law. OCSP provides

technical assistance for charter schools that are opening as well as those that experience a rapid growth in enrollment to adhere to the required procedures and obtain funds. Offices within ODE shall continue to do so by implementing the following:

- The Oregon Consolidated Grant application requires LEAs to list the charter schools they sponsor and indicate their participation in federal programs. Our office verifies the listing of all charter schools within the LEA.
- Site Federal monitoring of the LEA by ODE serves as a check on the charter school inclusion in Federal Program opportunities.
- Coordinate with other ODE offices such as School Finance and Special Education charged with overseeing Federal programs and grants to ensure all charter documents specifically address a public charter school's participation in and equitable access to these services.
- Present information about automatic inclusion of charter schools in federal grants and programs at the semi-annual Oregon Association for Compensatory Education (OACE) Conferences (specifically for Title I coordinators and teachers).
- Provide information to sponsoring (authorizing) school districts at semi-annual state meetings of the sponsors.

#### **iv. The Quality of the Management Plan**

##### Management Plan

The purpose of the management plan is to ensure that Oregon Department of Education Charter School Program achieves its outcomes, objectives, and activities on time and within budget.

**Comprehensive Management Plan**

**Objective 1: Increase the number of high quality charter schools in Oregon.**

<i>Activities</i>	<i>Timeline</i>	<i>Budget/ Resources</i>	<i>Responsibility</i>	<i>Milestones</i>
<p><u>Outreach</u></p> <p>Develop and implement Outreach and Marketing Plan to promote OCSP and sub-grant opportunities</p>	<p>Onset of grant;</p> <p>Ongoing</p>	<p>Staff time</p> <p>Travel</p> <p>Website updates</p>	<p>ODE Charter</p> <p>School Staff</p>	<p>Outreach plan developed and implemented.</p>
<p><u>Incentive Sub-grant Program</u></p> <p>-Update, distribute Charter School Incentive Grant RFP</p> <p>- Score Charter School Incentive Grant Applications</p> <p>- Award Charter Incentive Grants</p>	<p>Fall and Spring of each year</p>	<p>Printing</p> <p>Staff time</p> <p>Travel</p> <p>Sub-grants</p>	<p>ODE Charter</p> <p>School staff</p>	<p>RFP process implemented.</p> <p>Applications reviewed, scored and grants awarded.</p>
<p>Conduct charter school authorizers workshops, disseminate best practices for authorizers (phone calls, e-mails, presentations to district school boards and staff).</p>	<p>Ongoing</p>	<p>Staff time</p> <p>Supplies</p> <p>Printing</p>	<p>ODE Charter</p> <p>School staff</p>	<p>Annual workshops attended.</p> <p>Technical assistance provided.</p>

<i>Activities</i>	<i>Timeline</i>	<i>Budget/ Resources</i>	<i>Responsibility</i>	<i>Milestones</i>
Conduct charter school start-up workshops, charter school incentive grant writing workshops, charter school incentive grant project Director's meetings, individual start-up and implementation technical assistance	Annual	Staff time Supplies Printing	ODE Charter School staff	Workshops offered. TA provided as requested. High-quality incentive grant proposals received.
Implement mediation of denied charters.	As needed	Staff Time; Mediator Time	ODE Charter School Staff; Contracted Mediator	Charters mediated as needed.
Evaluate effectiveness of the program for charter school operators and authorizers in opening new charter schools.	At the end of each grant year.	Evaluator	Evaluator	Program is evaluated for effectiveness.
<b>Objective 2: Promote the dissemination of Oregon charter school best and promising practices to other public schools and LEAs for adoption and implementation.</b>				
<i>Activities</i>	<i>Timeline</i>	<i>Budget/ Resources</i>	<i>Responsibility</i>	<i>Milestones</i>

Work with partners to identify charter schools with best practices and distribute Charter School Dissemination Grant information to those schools.	Onset of grant and each year	Printing Mailing	ODE Staff	Three charter schools identified each year targeted for dissemination grants.
<u>Dissemination Sub-Grant Program</u> Distribute RFPs Review and score applications Award dissemination grants	Annual (spring of each year)	Dissemination grant funds	ODE Charter School staff	Dissemination grants awarded.
Dissemination Grant Writers Workshop	Annual (one month prior to grant deadline)	Staff time Printing	ODE Charter School staff	Workshop attended. Training provided. High quality proposals received.
Publicly identify dissemination grantees as having high-quality educational programs through formal announcements and website updates.	Annual	Dissemination grant	ODE Staff Partners	Dissemination grantees publicly acknowledged.
Take lead in partnering with other	Ongoing	Staff time	ODE Staff	All LEAs

educ. agencies to disseminate best practices to LEAs in the state.				receive dissemination information.
Evaluate effectiveness of program in disseminating best practices of charter schools in Oregon.	At the end of each grant year.	Evaluator	Evaluator	Program is evaluated for effectiveness.
<b>Objective 3: Support Oregon charter schools to be fiscally solvent and to incorporate sound leadership practices for long-term sustainability.</b>				
<i>Activities</i>	<i>Timeline</i>	<i>Budget/ Resources</i>	<i>Responsibility</i>	<i>Milestones</i>
Provide at least two technical assistance workshops as well as ongoing assistance for charter school operators on governance, leadership and financial management.	Ongoing	Workshops, phone, email	ODE Charter School Staff	Workshops attended. Training provided.
Review Annual performance reports, audits and grant progress reports, conduct site visits and provide recommendations for improvement.	Annually and grant progress reports as submitted.	Staff time	Local Sponsor & ODE Charter School staff	All reports reviewed as submitted. Each new charter school receives a site visit. Feedback given

				to all schools.
Partner with OSBA in providing technical assistance (workshops and just-in-time) for authorizers in providing oversight and support on financial management.	At onset of grant and as required	Staff time	ODE Charter School Staff. OSBA	Workshops attended. Training provided.
Inform charter schools of federal grant opportunities (through website and school districts).	Ongoing	Web Staff time	ODE Charter School staff and Federal program staff	Charter schools are informed of grant opportunities.
Ensure each charter school receives information about Federal funds/programs in which the charter school may participate (via website, school districts, etc.)	Four times per year	Web, Monitor- ing visits	ODE charter staff and Federal program staff	Each charter school has received information on Federal funding and program opportunities.
Evaluate the program's effectiveness in supporting schools to become fiscally solvent for long-term sustainability.	At the end of each grant year	Evaluator	Evaluator	Program is evaluated for effectiveness.

**Objective 4: Prepare and support charter schools to increase the academic achievement and graduation rates of secondary school students who are at greatest risk of not meeting state standards and not completing high school.**

<i>Activities</i>	<i>Timeline</i>	<i>Budget/Re sources</i>	<i>Responsibility</i>	<i>Milestones</i>
Provide information and technical assistance on closing the achievement gap through ODE professional development opportunities and partnering high performing schools with schools that are struggling for mentorship, and ongoing technical assistance.	Ongoing	Staff time	ODE Charter School staff	Partnerships between schools created. ODE professional development attended by charter schools.
Schools that serve secondary students will be given priority points on the incentive sub-grant.	Twice per year	Incentive grant funds	ODE Charter School staff	Priority is listed and highlighted in Incentive Grant RFP.
Evaluate effectiveness and usefulness of the program for supporting charter schools to increase academic achievement and graduation rates of secondary	At the end of each grant year.	Evaluator	Evaluator	Program is evaluated for effectiveness.

students.				
<b>Objective 5: Assist charter schools to incorporate new and innovative learning methods while also increasing rigor to meet the challenging needs of new Oregon diploma requirements.</b>				
<i>Activities</i>	<i>Timeline</i>	<i>Budget/Re sources</i>	<i>Responsibility</i>	<i>Milestones</i>
Partner with ODE offices/programs in disseminating information and providing TA on new graduation requirements.	Onset of grant; Bimonthly	Staff Time	ODE Staff	Information on grad. requirements disseminated.
Emphasize flexibility and innovation in Incentive Grant RFP.	Twice per year	Incentive grants	ODE Charter School Staff	RFP highlights flexibility and innovation.
Monitoring (AYP, State Report Card, drop-out rates, graduation rates, site visits) and assisting those schools that are struggling by providing one-on-one TA and by pairing with high performing schools (i.e., dissemination grantees) for technical assistance.	Ongoing, annual	Staff time	Local Sponsor & ODE Charter School staff	Struggling schools paired with high-performing schools. Training provided.
Dissemination grantees will attend and present at ODE sponsored Leadership Conference	Annual	Staff time Travel	ODE Staff	At least two charter schools present at

				Leadership Conf.
Dissemination grantees present at Closing the Achievement Gap conference and Superintendent's Summer Literacy Conference	Annual	Dissemination grant	ODE Charter School staff to invite	At least one charter school presents at each conference.
Provide charter schools support in creating comprehensive academic plans to meet rigor in new graduation requirements.	Ongoing	Staff time	ODE Staff	All charter schools receive TA in developing academic plans.

OCSP Team and Responsibilities

Joni Gilles (b) (5) FTE) will serve as Director and reports to Oregon State Board of Education as needed. She holds ultimate responsibility for the budget, organization, and overall functioning of the program. She may serve as the Oregon representative to national or federal conferences.

Margaret Bates (b) (5) FTE) will serve as the Grant Project Director. She will organize the incentive grant writing workshop, grant reviewing and scoring. She will also be the contact for any technical assistance for the incentive grant funded projects. Margaret will assist in the NCLB Federal Monitoring Site Visits of Titles I, II, V, and X and conduct some of the charter school grant funded site visits. She may serve as the Oregon representative to national or federal conferences and meetings.

Teresa Schneiderman (b) (5) FTE) is an Education Specialist. She will conduct the dissemination grant writing workshop, grant reviewing and scoring. She will be the contact for any technical assistance for the dissemination grant funded projects. Teresa will organize and direct the

process of charter schools appealing to the state board for sponsorship. In the first year of the grant, she will be the liaison between ODE and the State Board of Education sponsored charter schools. Teresa will be first contact for schools and will organize the charter school workshops and conference sponsored by ODE. She will assist in some of the NCLB Federal Monitoring Site Visits of Titles I, II, V, and X and do some of the charter school grant funded site visits. She may serve as the Oregon representative to national or federal conferences and meetings.

Donald Wildfang (b) (5) FTE) is an Education Specialist. In the second and third year he will serve as liaison between ODE and the State Board of Education sponsored charter schools. He will assist in Welcome Site Visits for new charter schools and site visits for grant funded charter schools.

Donna Newbeck (b) (5) FTE) is an Office Specialist. She is responsible for providing support for the Education Specialists and the Grant Project Director. She organizes conference sites, materials for meetings, and provides telephone and e-mail support to charter schools.

The OCSP Team meets bimonthly. The management plan and logic model will be used to develop a detailed work plan. The work plan for program staff, consultants and subcontractors will include a task analysis of program milestones. The work plan will describe project outcomes (objectives), activities, outputs (deliverables or products), person responsible, and timeline. Staff will develop a complete plan within the first month of the award. At each Oregon Charter School Program Team meeting, the work plan will be reviewed to assess the timelines for completing each task, person(s) responsible and current status, including expenditures and personnel allocation. The work plan will serve as the basis of team meetings in order to check program progress and process. These data will be used to assess the efficacy of efforts, measure progress

in achieving objectives, and to direct strategies for refining our methods. Assessing the program's progress in these areas will provide an immediate feedback loop for the project.

Contractor: Evaluators

During the first year of the grant ODE will provide a bid process for an external evaluator to conduct the evaluation of the OCSP program. ODE will provide a bid process for an additional evaluator/researcher to conduct a typology study of Oregon charter schools.

Sub-grant Process

Starting January 2003, OCSP standardized the grant process by scheduling two charter school incentive grant funding cycles each fiscal year. One takes place in the fall and the other is in the spring. This schedule allows time for OCSP to provide needed technical assistance to charter school developers. The schedule for the proposed project is shown in Table 6.

**Table 6: Timeline for Awarding Funds**

Sub-grant Funds	Timeline for awarding funds
Incentive Grants	Fall 2008, Spring 2009 Fall 2009, Spring 2010 Fall 2011, Spring 2011
Dissemination Grants	Spring 2009, 2010, 2011

Oregon awarded 13 new charter school incentive grants during the 2006 federal fiscal year (October 1, 2006-September 30, 2007). The purposes of the Oregon Charter School Incentive Grant Program are to:

1. Expand the number of high-quality and educationally diverse charter schools throughout the state by supporting the effort and partnership of charter school developers and sponsors.

2. Assist newly approved and operational charter schools in meeting their identified planning, start-up, and implementation needs.

Incentive grant funds provide resources for post-award planning and design of the educational program, including refinement of the desired educational program or professional development for teachers who will work in the charter school. This may also include planning activities that will lead to the opening of a new charter school such as evaluation of curriculum options, school design models, refinement of the charter school's educational program, and other planning activities. Funds also provide for initial implementation activities, including: informing the community about the school, acquiring the necessary equipment and educational materials and supplies, other initial operational costs not met from state/local sources, and other initial operating costs that can not be met from state and local funds. Initial implementation activities tend to be the "nuts and bolts" activities necessary for the actual opening of the charter school and follow the post-award planning and design process.

Technical Assistance. OCSP has made a commitment to assisting both charter school developers and authorizers during the grant process. Incentive Grant Writing Workshops are provided prior to each application deadline. The workshop provides information on the grant requirements, application process and approval procedures. Start-Up Workshops, Charter School Operator Workshops, and the Charter School Leadership Institute also provide opportunities for technical assistance. In addition, the staff provides assistance through telephone, email and the website on a continuous basis. Charter School Authorizers workshops are also provided each year. These workshops focus on implementation of the charter school law in Oregon. Both charter school developers and authorizers attend the workshops and receive information such as the authorizing, renewal and non-renewal processes.

Awarding Grants. The Oregon Charter School Incentive Grant Program is highly competitive. Federal law requires peer review of applications. Reviewers include charter developers, charter school board members, operators, authorizers, other charter experts and OCSP staff. The application clearly identifies the score value and scoring criteria of each element of the application. The peer review process requires two sets of reviewers, each application is read and scored twice, and if needed a third reviewer is used to determine the score of the application. Any applications 70 pts or above are funded. In addition to those schools that serve secondary students, priority will be given to charter school applications that:

- Emphasize flexible and innovative educational opportunities that will assist at-risk and under-served students to achieve state content and performance standards.
- Provide parent choice not available in geographic areas, urban or rural, in which a large proportion or number of public schools have been identified for improvement, corrective action or restructuring.

Appeals Process. Applicants may request the comments and final score of the review panel. An appeal of a grant award decision may be filed by submitting a written request for a hearing within 30 days of receiving official notification from the ODE that their application was not approved for a grant award. Requests to appeal the denial of a grant award must identify a violation by the ODE of a state or federal statute or regulation in failing to approve an application, or failing to award funds in amounts in accordance with the requirements of statutes and regulations.

The Incentive Grant Program consists of three phases, Planning, Implementation and Continued Implementation. The first phase is competitive, as a minimum score must be attained

to be considered for funding. OCSP monitors grantees through each phase to ensure accountability.

**Phase One: Competitive** application for Planning Grant (Year One). Phase One includes two stages. Stage One funds up to \$25,000 for planning activities and the remainder is awarded conditional upon sponsor approval of the charter proposal. The following documentation must be submitted to move from the **Planning Phase** into the **Implementation Phase**:

1. A signed charter, approved by the sponsoring school district;
2. An expenditure report of the Planning Grant funds;
3. Continuation report (Coversheet, Progress Report, Grant Activity Report, Inventory of Assets purchased with planning grant funds, revised implementation budget worksheet);
4. Letter from the Charter School Board indicating the fiscal agent of Phase 2 and 3 of the grant;
5. If Charter School is chooses to become fiscal agent, a copy of the EIN document declaring the EIN number for the Charter school.

**Phase Two: Non-competitive** application for an Implementation Grant (Year Two) of up to \$225,000 (\$125,000 base with balance of award based on number of students). The following documentation must be submitted to move from the **Implementation Phase** into the **Continued Implementation Phase**:

1. A copy of the annual report submitted to the local school district as per charter contract;
2. An expenditure report of the Implementation Grant funds;
3. Continuation report (Coversheet, Progress Report, Grant Activity Report, Inventory of Assets purchased with implementation grant funds, revised implementation budget worksheet).

**Phase Three: Non-competitive** application for a Continued Implementation Grant (Year Three) of up to \$225,000 (\$100,000 base with balance of award based on number of students). At the end of the grant period a final report is required.

Fiscal Integrity and Monitoring of Grant Expenditures. Ensuring the distribution and monitoring of grant funds is well established within ODE. As noted above, each new school has the opportunity to apply for implementation grants of up to \$450,000. These grants may be used for start-up expenses such as purchasing furniture, supplies, textbooks, etc. Allowable grant activities are determined by the Federal Public Charter School Program (Title V-Part B—Public Charter Schools). The implementation grants are for reimbursable expenditures only. The fiscal agent of the charter school submits documentation of the expenditure and a request for reimbursement to ODE. ODE then processes the request and submits payment. This process allows for fiscal integrity and monitoring of grant expenditures.

**v. The quality of the dissemination activities and the likelihood that those activities will improve student achievement.**

Oregon provides Dissemination Grants to Oregon Charter schools in at least the third year of operation. To date there have been 10 grants supporting dissemination activities such as:

- **School-wide discipline.** The project is implementation of school-wide behavioral systems in other schools. Project goals include 1) share different systems that could be implemented and adapted for any school, 2) decrease the number of referrals made to the school office, 3) preserve student learning by less classroom time being used for disciplinary actions, 4) Develop a one-on-one discipline program with a school.

- **Implementation of design studios and accompanying website and guidebooks.** The website and guidebooks will be based on New Urban High School (NUHS) design principles that

promote student achievement: small learning communities, project-based learning, rigorous and relevant curriculum, inclusive program and instructional practices and expanded learning opportunities. Goals of this project are: 1) develop partnerships with other public schools designed to improve student performance in each of the schools participating in the partnership, 2) provide materials of the successful practices of NUHS designed to improve student performance, 3) create a network of small schools that share best practices and lessons learned for all public schools via the NUHS Best Practices Website.

**The following activities may qualify as dissemination activities: a) assisting other individuals with the planning and start-up of one or more new public schools, including charter schools, that are independent of the assisting charter school and its developers and that agree to be held to at least as high a level of accountability as the assisting charter school; b) developing partnerships with other public schools designed to improve student performance; c) developing curriculum materials, assessments, and other materials that promote increased student achievement and are based on successful practices within the assisting charter school; and d) conducting evaluations and developing materials that document the successful practices of the assisting charter school and that are designed to improve student performance in other schools.**

Oregon proposes to dedicate up to 10 percent of the federal grant funds to support dissemination activities. A charter school may apply for a dissemination grant, regardless of whether it has applied for or received a planning or implementation grant under the CSP, if the charter school has been in operation for at least three (3) consecutive years and has demonstrated overall success, including the following: a) substantial progress in improving student achievement; b) high levels of parent satisfaction; and c) the management and leadership

necessary to overcome initial start-up problems and establish a thriving, financially viable charter school. Any public charter school receiving a dissemination grant must provide thorough and high-quality information that meets the needs of other schools trying to learn from the public charter school's experience.

In spring of 2008, forty-three Oregon public charter schools will meet the three year requirement to apply for a dissemination sub-grant. OCSP will work with partner organizations and school districts to identify charter schools with promising practices and then distribute information about the Charter School Dissemination Grant opportunities to those schools. The focus of OCSP is to encourage quality dissemination grant applications. Staff provide information and assistance on the grant opportunity and dissemination strategies at the monthly charter operator technical assistance meetings and the annual Charter School Leadership Institute. OCSP offers an annual Dissemination Grant Writers Workshop to provide more in-depth information on the grant opportunity, grant requirements, and application process. The Dissemination Grant applications are reviewed by a broad-based committee of individuals supportive of the systemic reform of public education, the public charter school concept, and knowledgeable of educational and organizational concepts embodied in school reform. Scoring of the grant applications is based on specific criteria listed in the Dissemination Grant RFP which includes: 1) Description of Public Charter School and Evidence of Overall School Success, 2) Description of High Quality Dissemination Project, 3) Viability of the Project and Soundness of Planning, 4) Value of the Dissemination Grant. At least one project goal must use OSAT results and Adequate Yearly Progress as an indicator. Each application is read twice by different readers and if needed is read a third time for higher reliability in scoring. For a Dissemination Grant proposal to be funded, a minimum score must be attained. Grants are

awarded within six weeks of the grant deadline. Dissemination grants are awarded in the spring. OCSP proposes to provide an incentive for charter schools to participate in the dissemination grant by identifying grantees publicly and broadly as having high-quality educational programs. This may give schools the opportunity to leverage dissemination grants to attract additional resources and to recruit students. Publicizing these successes may also encourage more LEAs and non-charter schools to participate in dissemination activities.

The dissemination grant opportunity supports public charter schools' efforts to form bridges with the larger system; to share best practices and insights; and to transform specific successes and lessons learned into broader reforms. According ORS 338.015, "It is the intent that public charter schools may serve as models and catalysts for the improvement of other public schools and the public school system." OCSP will encourage charter schools to share a large enough percentage of the funding with target schools (other charter schools and non-charter schools) so they have a strong incentive to participate in the dissemination project. Priority points will be awarded during the application process to those proposals that have already identified a list of charter and/or non-charter school targets. Applicants will be required to include information about how they will target non-charter schools.

Dissemination grant funds will be used to enable successful charter schools with demonstrated progress in improving student achievement to develop curriculum materials, provide professional development, and provide mentoring to emerging charter schools. Those that identify and propose to disseminate best practices in addressing the needs of at-risk students (especially secondary students) will receive priority. Collaboration and partnerships are encouraged in developing dissemination activities. Partnerships that may be undertaken in two ways: 1) A single, eligible public charter school may apply under one single grant application

and one grant award to develop and disseminate sound practices to one or more public schools (charter and traditional); and 2) Eligible public charter schools may apply in partnership with one or more public charter schools under one single grant application and one grant award to develop, and disseminate sound practices to schools within and outside of the partnership.

The Dissemination grant recipients will be asked to present a workshop at the Oregon Charter School Conference, Superintendent's "Closing the Achievement Gap" Conference or the Superintendent's Summer Institute. Dissemination grants are expected to range from \$60,000 to \$120,000 per year, for two years. Specific awards may be adjusted to more accurately reflect reasonable project scope and costs. The maximum length of the dissemination project is 24 months but applicants may propose a shorter project period. The second year of funding is contingent upon ODE receiving a satisfactory progress report and mid-year report from the grantee, a review of the update budget and the availability of federal funds. If the grant is for a one-year period, the public charter school may again apply for funds (through the competitive grant process) for additional activities for a second year. All awardees must complete a final report at the end of their project.

Implementing the newly adopted Oregon high school diploma requirements will lead to significant changes in the way teaching and learning occurs at all levels of the education continuum. High schools, middle schools, elementary schools, and community colleges and universities will have to make adjustments to support these changes. Middle and elementary schools will need to modify their curriculum, instruction, assessments and general practices to better prepare students to meet the high school requirements. All education sectors will need to align curriculum, course content and standards, proficiencies and assessments. A system of intervention and support will be required for students to meet these rigorous requirements. The

charter schools of Oregon have some strategies and alternative assessments to offer. The dissemination grant will continue to assist in the dissemination of the practices.

#### **vi. Quality of the Evaluation**

The definitive evaluation of the proposed program will be based on the extent that the ultimate goal of the OCSP – increasing academic achievement of all students – is achieved.

The evaluation plan is based on process and outcome data using both qualitative and quantitative data. The process evaluation addresses both implementation, and the on-going effectiveness, of each of the activities/services of the program. The plan calls for continuous monitoring of the program by the Project Director and the OCSP Team on a bimonthly, quarterly and yearly basis.

It will answer basic questions such as:

- Is the project doing what it said it would do and in the way that it said?
- Whom are we reaching through our outreach efforts? How does that compare to who we targeted?
- Are workshops implemented as planned? Are participants satisfied with workshops?

A detailed work plan (as described earlier) that clearly articulates program resources, milestones, person responsible and timeline will serve as the basis of Team meetings and in checking our progress and process. This information will be used to assess the efficacy of our efforts, measure progress in achieving objectives, and to direct strategies for refining our methods.

Outcomes-based evaluation focuses on formative and summative evaluation to assess progress toward achieving short-term, medium-term and long-term outcomes of the program. Performance measures determine the extent to which the OCSP's objectives are being met. The evaluation includes comprehensive performance measures that address both the process of

working toward each objective and the outcomes related to meeting each objective. The performance measures are described below.

### Performance Measures

Objective 1: Increase the number of high quality charter schools in Oregon.

Process Measures:

- a. Two incentive grant writing workshops and two start-up logistics workshops will be provided each year of the grant.
- b. For each year of the grant, there will be a 10% increase in the number of funded charter school incentive grants as compared to the previous year.

Outcome Measures:

- a. 75% of Charter school developers and operators that receive incentive grant awards will report at least a 75% increase in knowledge of charter school start-up logistics and operation at the end of each grant year.
- b. Thirty new charter schools will be created in Oregon during the course of the next three years.
- c. 70% of charter schools in Oregon will meet Adequate Yearly Progress for each year of the grant.

Data Collection: Each year, two grant applications rounds are available for charter school developers. The number of funded charter school incentive grants will be recorded each round for a total each year. The number of charter schools created will be monitored through the Oregon Department of Education's Institution Data Base. The Data Base is the resource for the state report to EDEN. An annual evaluation of charter school performance will be available each December of the previous year's charter school Annual Yearly Progress and State Report Card

ratings. Measures of operator and developer knowledge of start-up logistics and operation will be included in incentive grantee annual report requirements. The evaluation will be completed by the contracted evaluator and made public to the community through the ODE charter school web page and disseminated to others as appropriate. The information will assist us in monitoring and reporting progress of charter schools in Oregon.

Objective 2: Promote the dissemination of Oregon charter school best and promising practices to other public schools and LEAs for adoption and implementation.

Process Measures:

- a. Each year of the grant cycle, three charter schools will be identified by OCSP partners as providing best or promising practices.
- b. At least 12 outreach/marketing activities promoting OCSP and charter school best practices will be conducted each year of the grant cycle.
- c. By September 2011, 15 dissemination grants will be funded that meet OCSP dissemination grant priorities.

Outcome Measures:

- a. By September 2011, 80% of participants in dissemination activities will report an increase in awareness and knowledge of charter school best practices.
- b. By September 2011, 20% of participants in dissemination activities will report they have or they intend to adopt and implement best practices.

Data collection: The number of schools identified as having best practices will be tracked through by OCSP staff as dissemination grant RFPS are distributed. The number of outreach activities is tracked and reported through OCSP office systems. Dissemination grantees will report in their annual Dissemination Grant Progress Reports the percent of participants reporting an increase in

knowledge and intent to implement practices following active participation in their dissemination activities. Charter schools will collect this data based on a standard survey that will be developed during the second year of the grant. All completed surveys will be mailed to the OCSP for evaluation using statistical software to create needed frequencies, etc. Results will be analyzed by the evaluation contractor and communicated to the Dissemination grantees as well as Oregon community through the OCSP annual evaluation report on the OCSP website.

Objective 3: Support Oregon charter schools to be fiscally solvent and to incorporate sound leadership practices for long-term sustainability.

Process Measures:

- a. By September 2011, 90% of charter school operators will have participated in at least four technical assistance workshops on governance and fiscal responsibility.
- b. 100% of new charter schools in Oregon will receive at least one site visit from OCSP.

Outcome Measures:

- a. By September 2011, 75% of charter school operators will report an increase in knowledge of fiscal management issues.
- b. There will be no more than 1% charter school closures in Oregon per year, due to lack of fiscal responsibility.

Data Collection: Through a checklist of attendees to governance and fiscal responsibility workshops, ODE will record the participation of charter school operators for a goal of at least 90% participation. Through surveys given in each of the technical assistance workshops on governance and fiscal responsibility, participants will show their knowledge of charter school fiscal management issues as identified by Oregon Department of Education. The quality of our

charter schools will be improved if the fiscal management skills are firmly in place. The charter school renewal law includes fiscal stability as one consideration for non-renewal. The increased knowledge of fiscal management by charter school operators will increase the likelihood of non-renewals based on fiscal stability to decrease. Charter school closures are tracked through ODE.

Objective 4: Prepare and support charter schools to increase the academic achievement and graduation rates of secondary school students who are at greatest risk of not meeting state standards and not completing high school.

Process Measures:

- a. By the end of year three, 60% charter schools that receive OCSP incentive grant funds will serve at-risk secondary students.
- b. By the end of year three, 60% charter schools that receive OCSP dissemination grant funds will serve at-risk secondary students.

Outcome Measures:

- a. The percentage of secondary students in charter schools that graduate from high school will be higher than non-charter school students by the end of the second year.
- b. 75% of charter school students will meet or exceed state academic standards in math in each year of the grant.
- c. 80% of charter school students will meet or exceed state academic standards in Language Arts/Reading in each year of the grant.

Data Collection: Incentive and Dissemination grantees' student demographics are tracked by OCSP through the awards process. An annual evaluation of charter school performance will be available each December of the previous year's charter school Annual Yearly Progress and State

Report Card ratings. It will include the graduation and drop-out rates of each charter school serving secondary students. The evaluation will be completed by the contracted evaluator and available through the ODE charter school web page as disseminated through State Report Cards. The information will assist us in monitoring and reporting progress of charter schools in Oregon.

Objective 5: Assist charter schools to incorporate new and innovative learning methods while also increasing rigor to meet the challenging needs of new Oregon diploma requirements.

Process Measures:

- a. At least 2 outreach activities that disseminate information and resources to charter schools on new Oregon high school diploma requirements will be conducted each year of the grant.

Outcome Measures:

- a. By September 2011, 100% of charter schools in Oregon will be aware of new graduation requirements.
- b. By September 2011, 100% of charter schools will have an academic plan in place to meet new graduation requirements.

Data Collection: Outreach activities are tracked through OCSP office systems. Those that focus on new graduation requirements will be noted for reporting. An annual survey of the charter schools will be given to determine the awareness and implementation of the new graduations requirements. The survey will be collected electronically and through phone interviews. The survey instrument will be developed during the second year of the grant and collected through electronic means. The data will be analyzed by the external evaluation contractor and included in the OCSP annual evaluation report on the OCSP website

In addition to the process measures listed above, OCSP will collect process evaluation data on technical assistance activities that cross all outcomes. The number and types of phone calls, emails and other requests for technical assistance will be tracked to better inform OCSP of technical assistance topics and needs from the charter school community in Oregon. The external evaluator will develop a system of tracking this information and obtaining the qualitative data needed to compliment the raw data.

### External Evaluation

OCSP will contract with an external evaluator for evaluation of the program. During the first year of the grant ODE will provide a bid process for an external evaluator. The evaluator will be responsible for collecting and analyzing the data from state achievement reports, state charter school surveys, and program specific surveys, using both qualitative and quantitative data. The result will be an annual evaluation of the program effectiveness based on the project objectives and the performance of students attending charter schools. OCSP will be purposeful in obtaining an evaluator with the skills and experience necessary to implement a high quality evaluation. Ideally, the evaluator will have at least a master's degree in education, have extensive experience with a wide range of quantitative data collection strategies as well as qualitative data collection, and be willing to work with program staff in a flexible and cooperative manner. Preference will be given to those that have experience in evaluating state agency programs.

OCSP proposes to expand the program evaluation to include a research study of the typology of charter schools in Oregon. As the charter school movement is gaining maturing in Oregon, the importance of better understanding the state's charter schools is crucial for continued success. A second evaluator/researcher will be contracted through OCSP to complete

this project. The evaluator will have a background in conducting typology studies of charter schools.

In 2006, the results of a nearly two-year project were released detailing the creation of a new typology of charter schools (Carpenter, 2006). This two dimensional typology classifies schools by their theme or curricular approach (Traditional, Progressive, Vocational, General, and Alternative Delivery) and the student population the school is designed to serve (open enrollment and targeted student population). This typology was created to provide a tool for the systematic classification of charter schools, which, in turn, will facilitate analyses of charter performance. Such classification and analyses will assist leaders, researchers, and policymakers in accountability reporting, determining best practices, and informing policy.

The typology was created by using a sample of schools from Arizona, California, Florida, Michigan, and Texas. Currently, the typology is being applied to schools in Colorado, and the project described herein would extend this research to Oregon. Data required to classify schools typically comes from narrative descriptions about the schools. Other data for this study, such as demographic and performance data, will come from databases like the Common Core of Data (CCD) or those available from the ODE.

The methods necessary to complete this project will closely adhere to the procedures used to create the typology. First, schools will be classified by type based on descriptions of their theme or curricular approach. Second, data analyses will examine school demographic differences by type. A final analysis will examine performance differences based on type after controlling for school demographic variables.

The data for this project are of three types. The first includes descriptions of schools that are used for the purpose of classification. These descriptions are commonly found in the Oregon

charter school directory, school report cards, school websites, and other narrative material. However, descriptions may not always suffice, requiring direct contact with the school to determine its type.

The second type of data includes school demographics, such as population, percent minority, years in operation, percent free and reduced lunch, and grade levels. These are available through databases such as the CCD. The third type of data includes school performance, available through the ODE. The total sample will include all Oregon charter schools in operation.

This project will collect, analyze, and report data on at least one year of data. Analyses will utilize Analysis of Covariance (ANCOVA) to test the effect of school type after controlling for various school level variables. If two years of data are used, data will also be analyzed using repeated measures ANCOVA. Analysis will include descriptive statistics for reporting purposes and inferential statistics resulting from ANCOVA. Final results will be submitted in a report to the ODE by December 2009.

The second project to begin in January 2009 will be a continuance of the previous year results. The second project will collect, analyze, and report longitudinal data from 1999 through December 2010. Analyses will utilize repeated measure of Analysis of Covariance (ANCOVA) to test the effect of school type after controlling for various school level variables. Analysis will include descriptive statistics for reporting purposes and inferential statistics resulting from ANCOVA. Final results will be submitted in a report to the ODE December 2010. Results from the project will be shared widely with charter school leaders, researchers, policy makers and the community.

# Project Narrative

## Other Narrative

### Attachment 1:

Title: Pages: Uploaded File: **8451-Mandatory\_2007-2008\_Charter\_Schoolslist.doc**

### Attachment 2:

Title: Pages: Uploaded File: **6608-Charter\_School\_Calendar\_2007-2008.doc**

### Attachment 3:

Title: Pages: Uploaded File: **5057-DissemGrant\_RFP.doc**

### Attachment 4:

Title: Pages: Uploaded File: **5471-Donna's\_Resume,\_1-30-08.doc**

### Attachment 5:

Title: Pages: Uploaded File: **9489-DW\_Resume.doc**

### Attachment 6:

Title: Pages: Uploaded File: **1718-Incentive\_RFPFinal\_08-09.doc**

### Attachment 7:

Title: Pages: Uploaded File: **9894-Joni\_Resume.doc**

### Attachment 8:

Title: Pages: Uploaded File: **2123-Margaret\_Batescs2.doc**

### Attachment 9:

Title: Pages: Uploaded File: **4634-resumeTS.doc**

## Charter Schools in Oregon 2007-2008

#	Charter School Date Opened	Contact Information	District/County	Enrollment	Grades Served	Website
1.	Academy of Character Education (ACE)	Starr Sahnaw PO Box 1652 195 N 6 <sup>th</sup> St Oakridge, OR 97424 541-942-9707 <a href="mailto:starr@aceclassicaled.org">starr@aceclassicaled.org</a>	South Lane Lane	50	K-12	<a href="http://www.aceclassicaled.org">www.aceclassicaled.org</a>
2.	Alliance Charter Academy	Lara Fabrycki 1404 7th Oregon city, OR 97045 503-593-9337 <a href="mailto:info@alliancecharteracademy.com">info@alliancecharteracademy.com</a>	Oregon City SD Clackamas	220	K-12	<a href="http://www.alliancecharteracademy.com">www.alliancecharteracademy.com</a>
3.	Armadillo Technical Institute 9/00	Mike Warner PO Box 1560 106 Rose St Phoenix, OR 97535-1560 541-535-3287 <a href="mailto:armadillotech@gmail.com">armadillotech@gmail.com</a>	Phoenix-Talent SD Jackson	99	4-12	<a href="http://www.armadillotech.org">www.armadillotech.org</a>
4.	Arthur Academy 9/02	Michelle Duhon 13717 SE Division St. Portland, OR 97236 503-252-3753 <a href="mailto:mduhon@arthuracademy.org">mduhon@arthuracademy.org</a>	David Douglas SD Multnomah	140	K-5	<a href="http://www.arthuracademy.org">www.arthuracademy.org</a>
5.	Arts and Technology Charter High School 9/05	Mike Tannenbaum/Tom Dearborn PO Box 35 8502 SW Main St, Suite 100 West Linn, OR 97068 503-673-7740 <a href="mailto:tannenbm@wlwv.k12.or.us">tannenbm@wlwv.k12.or.us</a>	West Linn- Wilsonville SD Clackamas	76	9-12	<a href="http://www.wlww.k12.or.us/schools/other/arttech.asp">www.wlww.k12.or.us/schools/other/arttech.asp</a>
6.	Baker Charter School 9/05	Tracy Moisan 999A Locust St. NE Salem, OR 97303 503-364-4042 <a href="mailto:moisan_tracy@salkeiz.k12.or.us">moisan_tracy@salkeiz.k12.or.us</a>	Salem-Keizer SD Marion	99	K-2	<a href="http://www.bakercharter.org">www.bakercharter.org</a>

7.	Ballston Community Charter School 9/06	Jeff Clabaugh 9015 DeJong Rd Amity, OR 97101 503-843-2537 <a href="mailto:bcsadmin@onlinenw.com">bcsadmin@onlinenw.com</a>	Amity SD Yamhill	42	K-12	
8.	Bethany Charter School 9/04	Kathy Frank 11824 Hazelgreen Rd. NE Silverton, OR 97381 503-873-4300 <a href="mailto:frank_kathy@silverfalls.k12.or.us">frank_kathy@silverfalls.k12.or.us</a>	Silver Falls SD Marion	108	K-8	<a href="http://www.bethanycharter.org">www.bethanycharter.org</a>
9.	Blue Mountain Charter School 9/04	Lesley Stine 76132 Blue Mountain School Rd Cottage Grove. OR 97424 541-942-7764 <a href="mailto:info@bluemountainschool.com">info@bluemountainschool.com</a>	South Lane SD Lane	59	K-12	<a href="http://www.bluemountainschool.com">www.bluemountainschool.com</a>
10.	Camas Valley School 9/04	Jane Pitcock PO Box 57 Camas Valley, OR 97416 541-445-2131 <a href="mailto:jane.pitcock@camasvalley.k12.or.us">jane.pitcock@camasvalley.k12.or.us</a>	Camas Valley SD Douglas	166	K-12	<a href="http://www.camasvalley.k12.or.us">www.camasvalley.k12.or.us</a>
11.	Cascade Heights Charter School 9/06	Holly Denman 13515 SE Rusk Rd Milwaukie, OR 97222 503-701-0009 <a href="mailto:info@cascadeheights.org">info@cascadeheights.org</a>	North Clackamas SD Clackamas	132	K-6	<a href="http://www.cascadeacademy.org">www.cascadeacademy.org</a>
12.	Center for Advanced Learning 9/03	Bill Lesh 1484 NW Civic Dr. Gresham, OR 97030 503-667-4978 <a href="http://bill_lesh@thecenterforadvancedlearning.org">bill_lesh@thecenterforadvancedlearning.org</a>	Gresham-Barlow SD Multnomah	400	11-12	<a href="http://www.thecenterforadvancedlearning.org">www.thecenterforadvancedlearning.org</a>
13.	Child's Way Charter School 9/04	Michael Kerns 37895 Row River Rd Culp Creek, OR 97427 541-946-1821 <a href="mailto:childsway@pacinfo.com">childsway@pacinfo.com</a>	South Lane SD Lane	40	6-12	

14.	City View Charter School 9/04	Pamela Grant 1771 SE Minter Bridge Rd. Hillsboro, OR 97123 503-844-9424 <a href="mailto:pgrant@cityviewcharter.org">pgrant@cityviewcharter.org</a>	Hillsboro SD Washington	62	1-6	<a href="http://www.cityviewcharter.org">www.cityviewcharter.org</a>
15.	Clackamas Middle College 9/04	Tim King 19729 South Hwy 213 Oregon City, OR 97045 503-518-5929 <a href="mailto:edchoices@msn.com">edchoices@msn.com</a>	North Clackamas SD Clackamas	244	7-12	<a href="http://www.clackamasmiddlecollege.org">www.clackamasmiddlecollege.org</a>
16.	Clackamas Web Academy 9/05	Tim King 19721 South Hwy 213 Oregon City, OR 97045 503-518-5925 <a href="mailto:edchoices@msn.com">edchoices@msn.com</a>	North Clackamas Clackamas	380	1-12	<a href="http://www.edline.net/pages/clackamas_web_academy">www.edline.net/pages/clackamas_web_academy</a>
17.	CM2 Opal School 9/01	Judy Graves 4015 SW Canyon Rd. Portland, OR 97221 503-417-9917 <a href="mailto:jgraves@portlandcm.org">jgraves@portlandcm.org</a>	Portland Public Schools Multnomah	75	Pre K-4	<a href="http://www.opalschool.org">www.opalschool.org</a>
18.	Columbia County Education Campus 9/02	Colleen Grogan 474 N 16 <sup>th</sup> St St. Helens, OR 97051 503-366-3207 <a href="mailto:ccec@sthelens.k12.or.us">ccec@sthelens.k12.or.us</a>	St. Helens SD Columbia	91	7-12	<a href="http://www.sthelens.k12.or.us">www.sthelens.k12.or.us</a>
19.	Days Creek Charter School 9/05	Laurie Newton PO Box 10 Days Creek, OR 97429 541-825-3296 <a href="mailto:laurie.newton@dayscreek.k12.or.us">laurie.newton@dayscreek.k12.or.us</a>	Douglas County SD Douglas	184	6-12	<a href="http://days.or.schoolwebpages.com">http://days.or.schoolwebpages.com</a>
20.	Deschutes Edge Charter School 9/05	Carrie Carpenter 1220 NW Upas Ave Redmond, OR 97756 541-526-6440 <a href="mailto:carrie.carpente@redmond.k12.or.us">carrie.carpente@redmond.k12.or.us</a>	Redmond SD Deschutes	211	6-8	<a href="http://www.redmond.k12.or.us/gregory/charterschool/decs.htm">www.redmond.k12.or.us/gregory/charterschool/decs.htm</a>

21.	EagleRidge High School	Steve Iverson 429 8 <sup>th</sup> St Klamath Falls, OR 97601 541-850-9949 <a href="mailto:siverson@eaqleridgehigh.us">siverson@eaqleridgehigh.us</a>	Klamath Falls City SD Klamath	110	9-10	<a href="http://www.eaqleridgehigh.com">www.eaqleridgehigh.com</a>
22.	Eddyville Charter School 9/03	Don McDonald PO Box 68 Eddyville School Rd. Eddyville, OR 97343 541-875-2942 <a href="mailto:don_mcdonald@lincoln.k12.or.us">don_mcdonald@lincoln.k12.or.us</a>	Lincoln County SD Lincoln	233	K-12	
23.	Emerson School 9/03	Tara O'Neil 105 NW Park Ave. Portland, OR 97209 503-525-6124 <a href="mailto:info@emersonschool.org">info@emersonschool.org</a>	Portland Public Schools Multnomah	126	K-5	<a href="http://www.emersonschool.org">www.emersonschool.org</a>
24.	Forest Grove Community Charter School	Vanessa Gray 2417 15 <sup>th</sup> Ave Forest Grove, OR 97116 503-359-0672 <a href="mailto:vgray@fgcschool.org">vgray@fgcschool.org</a>	Forest Grove SD Washington	140	1-9	<a href="http://www.fgcschool.org/index.php">www.fgcschool.org/index.php</a>
25.	Fossil Charter School	Mike Hughes PO Box 206 Fossil, OR 97830 541-763-4303 <a href="mailto:mhughes@fossil.k12.r.us">mhughes@fossil.k12.r.us</a>	Fossil SD Wheeler	88	K-12	
26.	Four Rivers Community School 9/03	Chelle Robins 2232 SW 4 <sup>th</sup> Ave. Ontario, OR 97914 541-889-3715 <a href="mailto:chelle@4riverscs.org">chelle@4riverscs.org</a>	Ontario SD Malheur	123	K-5	<a href="http://www.4riverscs.org">www.4riverscs.org</a>
27.	Gresham Arthur Academy	Ryan Hull 1890 NE Cleveland Ave Gresham, OR 97030 503-667-4900 <a href="mailto:greshamadmin@arthuracademy.org">greshamadmin@arthuracademy.org</a>	Gresham-Barlow SD Multnomah	90	K-3	<a href="http://www.arthuracademy.org">www.arthuracademy.org</a>

28.	Howard Street Charter School 9/02	Dan Johnson 710 Howard St. SE Salem, OR 97302 503-399-3408 <a href="mailto:Johnson_dan@salkeiz.k12.or.us">Johnson_dan@salkeiz.k12.or.us</a>	Salem-Keizer SD Marion	154	6-8	<a href="http://www.howardstreet.org">www.howardstreet.org</a>
29.	Insight School of Oregon 1/08	Fred Schwartz 1590 NW Spring St Newport, OR 97365 541-265-4408 <a href="mailto:info@insightor.net">info@insightor.net</a>	Lincoln County SD Lincoln		9-12	<a href="http://www.insightor.net">www.insightor.net</a>
30.	International School of the Cascades 9/05	Donna Howard 2105 W Antler Redmond, OR 97756 541-923-4840 <a href="mailto:donna.howard@redmond.k12.or.us">donna.howard@redmond.k12.or.us</a>	Redmond SD Deschutes	121	9-12	<a href="http://www.redmond.k12.or.us/isc">www.redmond.k12.or.us/isc</a>
31.	Ione Charter School 9/04	Bryn Browning PO Box 167 445 Spring St Ione, OR 97843 541-422-7131 <a href="mailto:bryn.browning@ione.k12.or.us">bryn.browning@ione.k12.or.us</a>	Ione SD Morrow	154	K-12	<a href="http://www.ione.k12.or.us">www.ione.k12.or.us</a>
32.	Jane Goodall Environmental Middle School 9/04	David Blair 2805 Lansing Ave. NE Salem, OR 97303 503-399-3215 <a href="mailto:blair_david@salkeiz.k12.or.us">blair_david@salkeiz.k12.or.us</a>	Salem-Keizer SD Marion	89	6-8	<a href="http://www.jgems.net">www.jgems.net</a>
33.	Kings Valley Charter School 9/01	Mark Hazelton 38840 Kings Valley Highway Philomath, OR 97370 541-929-2134 <a href="mailto:mark.hazelton@kingsvalleycharterschool.org">mark.hazelton@kingsvalleycharterschool.org</a>	Philomath SD Benton	95	K-8	<a href="http://www.kingsvalleycharterschool.org">www.kingsvalleycharterschool.org</a>
34.	LEP High School (Leadership and Entrepreneurial Public Charter high School) 9/06	Lorna Fast Buffalo Horse 2044 E Burnside St Portland, OR 97214 503-254-2537 <a href="mailto:info@lephigh.org">info@lephigh.org</a>	Portland Public Schools Multnomah	102	9-10	<a href="http://www.lephigh.org">www.lephigh.org</a>

35.	Lighthouse School 9/02	Bruce Steele 93670 Viking Lane North Bend, OR 97459 541-751-1649 <a href="mailto:lhsteele@nbend.k12.or.us">lhsteele@nbend.k12.or.us</a>	North Bend SD Coos	158	K-7	<a href="http://www.lighthouse.nbend.k12.or.us">www.lighthouse.nbend.k12.or.us</a>
36.	Lincoln City Career Technical High 9/00	Mark Peery/Marie Jones 801 SW Hwy 101, Suite 404 Lincoln City, OR 97367 541-996-5534 <a href="mailto:office@careertech.us">office@careertech.us</a>	Lincoln County SD Lincoln	52	9-12	<a href="http://www.careertech.us">www.careertech.us</a>
37.	Lourdes School 9/99	Linda Duman 39059 Jordan Rd Scio, OR 97374 503-394-3340 <a href="mailto:lourdes@smt-net.com">lourdes@smt-net.com</a>	Scio SD Linn	49	K-8	<a href="http://www.lourdes.k12.or.us">www.lourdes.k12.or.us</a>
38.	Luckiamute Valley Charter School 9/01	Dan Austin 12975 Kings Valley Highway Monmouth, OR 97361-9525 503-838-1933 <a href="mailto:pd.charter@dallas.k12.or.us">pd.charter@dallas.k12.or.us</a>	Dallas SD Polk	115	K-4 5-8	<a href="http://www.lvcs.k12.or.us">www.lvcs.k12.or.us</a>
39.	Madrone Trail School	Corinne Brion PO Box 579 129 N Oakdale Ave Medford, OR 97501 541-245-6787 <a href="mailto:school@madronetrail.org">school@madronetrail.org</a>	Medford SD Jackson	72	K-2	<a href="http://www.madronetrail.org">www.madronetrail.org</a>
40.	Milwaukie Academy of the Arts 9/05	Bill Maher/Kelly Carlisle 11300 SE 23 <sup>rd</sup> Ave Milwaukie, OR 97222 503-353-5851 <a href="mailto:maa@nclack.k12.or.us">maa@nclack.k12.or.us</a>	North Clackamas SD Clackamas	163	9-12	<a href="http://www.academyofthearts.org">www.academyofthearts.org</a>
41.	MITCH 9/02	Debi Lorence PO Box 230575 10445 Cantbury St Tigard, OR 97281-0575 503-639-5757 <a href="mailto:mitch@mitchcharterschool.org">mitch@mitchcharterschool.org</a>	Tigard-Tualatin SD Washington	165	K-8	<a href="http://www.mitchcharterschool.org">www.mitchcharterschool.org</a>
42.	MITCH Sherwood Charter School	Fred Puhl PO Box 1342	Sherwood SD Washington	81	K-3	<a href="http://www.mitchcharterschool.org">www.mitchcharterschool.org</a>

	9/05	23264 SW Main St Sherwood, OR 97140 503-925-8007 <a href="mailto:mitchsherwood@verizon.net">mitchsherwood@verizon.net</a>				
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43.	Mosier Community School 9/02	Carole Schmidt P.O. Box 307 1204 First Ave. Mosier, OR 97040 541-478-3321 <a href="mailto:schmidtc@nwasco.k12.or.us">schmidtc@nwasco.k12.or.us</a>	North Wasco County SD Wasco	128	K-6	<a href="http://www.mosierschool.com">www.mosierschool.com</a>
44.	Multisensory Learning Academy 9/01	Terri Amacher 402 NE 172 <sup>nd</sup> Ave. Portland, OR 97230-6442 503-261-0202 <a href="mailto:tamacher@mla.k12.or.us">tamacher@mla.k12.or.us</a>	Reynolds SD Multnomah	197	K-5	<a href="http://www.mla.k12.or.us">www.mla.k12.or.us</a>
45.	Network Charter School 9/03	Mary Leighton 45 W Broadway, Suite 201 Eugene, OR 97401 541-344-1229 <a href="mailto:mary@networkcharterschool.org">mary@networkcharterschool.org</a>	Eugene SD Lane	105	7-12	<a href="http://www.networkcharterschool.org">www.networkcharterschool.org</a>
46.	New Urban High School 9/03	Ken Costa 1901 SE Oak Grove Blvd Milwaukie, OR 97267 503-353-5925 <a href="mailto:costak@newurban.org">costak@newurban.org</a>	North Clackamas SD Clackamas	248	9-12	<a href="http://www.newurban.org">www.newurban.org</a>
47.	Nixyaawi Community School 9/04	Fjell Ley PO Box 638 73300 July Grounds Lane Pendleton, OR 97801 541-966-2680 <a href="mailto:fjell.ley@pendleton.k12.or.us">fjell.ley@pendleton.k12.or.us</a>	Pendleton SD Umatilla	55	9-12	<a href="http://www.oncs.w.blogspot.com">www.oncs.w.blogspot.com</a>
48.	North Columbia Academy 9/04	Kristin Carrico 305 3 <sup>rd</sup> West, Rm. 14 28168 Old Rainier Rd Rainier, OR 97048 503-556-5041 <a href="mailto:kristin_carrico@rsd.k12.or.us">kristin_carrico@rsd.k12.or.us</a>	Rainier SD Columbia	27	9-12	<a href="http://www.rainier.k12.or.us">www.rainier.k12.or.us</a>
49.	Optimum Learning Environment 9/02	Gary Etchemendy 7905 June Reid Place Keizer, OR 97303 503-399-5548 <a href="mailto:etchemendy_gary@salkeiz.k12.or.us">etchemendy_gary@salkeiz.k12.or.us</a>	Salem-Keizer SD Marion	125	1-5	<a href="http://www.salkeiz.k12.or.us/districtcenter/schools/ole.htm">www.salkeiz.k12.or.us/districtcenter/schools/ole.htm</a>

50.	Oregon City Service Learning Academy (OCSLA) 9/06	Melanie Schaffer PO Box 2110 1104 John Adams Oregon City, OR 97045 503-785-8445 <a href="mailto:melanie.schaffer@orecity.k12.or.us">melanie.schaffer@orecity.k12.or.us</a>	Oregon City SD Clackamas	90	9-12	<a href="http://www.orecity.k12.or.us/ocsla">www.orecity.k12.or.us/ocsla</a>
51.	Oregon Coast Technology School 9/03	James Moyer 1913 Meade St. North Bend, OR 97459-3432 541-756-8307 <a href="mailto:jimm@nbend.k12.or.us">jimm@nbend.k12.or.us</a>	North Bend SD Coos	290	6-11	<a href="http://www.student.nbend.k12.or.us/orco/homepage.html">www.student.nbend.k12.or.us/orco/homepage.html</a>
52.	Oregon Connections Academy 9/05	Jerry Wilks PO Box 1160 38875 NW First Ave Scio, OR 97374 503-394-4315 <a href="mailto:jwilks@connectionsacademy.com">jwilks@connectionsacademy.com</a>	Scio SD Linn	1,311	K-11	<a href="http://www.connectionsacademy.com">www.connectionsacademy.com</a>
53.	Paisley Charter School 9/03	Mark Jeffery PO Box 97 Paisley, OR 97636 541-943-3111 <a href="mailto:suptjeffery@hotmail.com">suptjeffery@hotmail.com</a>	Paisley SD Lake	77	K-12	<a href="http://www.paisleyschool.com">www.paisleyschool.com</a>
54.	Phoenix School of Roseburg 9/05	Ron Breyne 3131 NE Diamond Lake Blvd Roseburg, OR 97470 541-673-3036 <a href="mailto:rbreyne@douglasfast.net">rbreyne@douglasfast.net</a>	Douglas County SD Douglas	195	7-12	<a href="http://www.roseburgphoenix.com">www.roseburgphoenix.com</a>
55.	Portland Arthur Academy 9/05	Christina Loug 7507 SE Yamhill Portland, OR 97215 503-257-3936 <a href="mailto:portlandadmin@arthuracademy.org">portlandadmin@arthuracademy.org</a>	Portland Public Schools Multnomah	91	K-2	<a href="http://www.arthuracademy.org">www.arthuracademy.org</a>
56.	Portland Village School	Tom Klein 7654 N Delaware Ave Portland, OR 97217 503-445-0056 <a href="mailto:info@portlandvillageschool.org">info@portlandvillageschool.org</a>	Portland SD Multnomah	155	K-4	<a href="http://www.portlandvillageschool.org">www.portlandvillageschool.org</a>

57.	REALMS 9/01	Roger White 1501 NE Neff Rd. Bend, OR 97701 541-322-5323 <a href="mailto:rpwhite@bend.k12.or.us">rpwhite@bend.k12.or.us</a>	Bend-La Pine SD Deschutes	59	6-8	
58.	Resource Link 12/03	Lesli Gieselman PO Box 509 755 S 7 <sup>th</sup> St. Coos Bay, OR 97420 541-267-1499 <a href="mailto:leslig@coos-bay.k12.or.us">leslig@coos-bay.k12.or.us</a>	Coos Bay SD Coos	42	5-12	<a href="http://www.reslink.org">www.reslink.org</a>
59.	Reynolds Arthur Academy 9/04	Chris Arnold 123 SE 21 <sup>st</sup> St. Troutdale, OR 97060-3300 503-465-8882 <a href="mailto:reynoldsadmin@arthuracademy.org">reynoldsadmin@arthuracademy.org</a>	Reynolds SD Multnomah	126	K-3	<a href="http://www.arthuracademy.org">www.arthuracademy.org</a>
60.	Riddle Education Center 9/04	Alan Springer PO Box 300 Riddle, OR 97469 541-874-3202 <a href="mailto:alan.springer@riddle.k12.or.us">alan.springer@riddle.k12.or.us</a>	Riddle SD Douglas	33	7-12	<a href="http://www.riddle.k12.or.us">www.riddle.k12.or.us</a>
61.	Ridgeline Montessori Charter School 9/00	Cindy Bass 2855 Lincoln St, #C Eugene, OR 97405 541-681-9662 <a href="mailto:cbass@ridgeline.org">cbass@ridgeline.org</a>	Eugene SD Lane	229	K-8	<a href="http://www.ridgeline.org">www.ridgeline.org</a>
62.	Sage Community School	Faith Wilkins PO Box 655 43580 Hwy 62 Chiloquin, OR 97624 541-783-2533 <a href="mailto:sgirdner@sagecommunityschool.org">sgirdner@sagecommunityschool.org</a>	Klamath County SD Klamath	65	K-6	<a href="http://www.sagecommunityschool.org">www.sagecommunityschool.org</a>
63.	Sand Ridge Charter School 9/02	Jay Jackson 30581 Sodaville-Mt. Home Rd Lebanon, OR 97355 541-258-2416 <a href="mailto:sracad@proaxis.com">sracad@proaxis.com</a>	Lebanon Community SD Linn	258	K-12	<a href="http://www.pieducation.net">www.pieducation.net</a>

64.	SEI Academy 9/04	Linda Harris 3920 N Kerby Ave. Portland, OR 97227 503-249-1721 <a href="mailto:lindah@selfenhancement.org">lindah@selfenhancement.org</a>	Portland Public Schools Multnomah	134	6-7	<a href="http://www.selfenhancement.org">www.selfenhancement.org</a>
65.	Sheridan Japanese School 9/03	Kim Miller PO Box 446 430 SW Monroe St Sheridan, OR 97378 503-843-7438 <a href="mailto:sheridanjapanese@wbcable.net">sheridanjapanese@wbcable.net</a> <a href="mailto:office@sjsfoundation.com">office@sjsfoundation.com</a>	Sheridan SD Yamhill	82	4-12	<a href="http://www.sjsfoundation.com">www.sjsfoundation.com</a>
66.	Siletz Valley Early College Academy 9/06	Robert Line PO Box 247 245 James Frank Ave. NW Siletz, OR 97380-0247 541-444-1100 <a href="mailto:rlinesvs@yahoo.com">rlinesvs@yahoo.com</a>	Lincoln County SD Lincoln	59	9-12	<a href="http://www.siletzvalleyschool.org">www.siletzvalleyschool.org</a>
67.	Siletz Valley School 9/03	Robert Line PO Box 247 245 James Frank Ave. NW Siletz, OR 97380-0247 541-444-1100 <a href="mailto:rlinesvs@yahoo.com">rlinesvs@yahoo.com</a>	Lincoln County SD Lincoln	190	K-8	<a href="http://www.siletzvalleyschool.org">www.siletzvalleyschool.org</a>
68.	Sisters Charter Academy of Fine Arts	Bill Lewis 450 E Cascade Sisters, OR 97759 541-549-9800 <a href="mailto:sisterscharterschool@yahoo.com">sisterscharterschool@yahoo.com</a>	Sisters SD Deschutes	40	K-6	<a href="http://www.sisterscharterschool.org">www.sisterscharterschool.org</a>
69.	South Columbia Family School 9/04	Anita Ott Scappoose SD 33589 High School Way Scappoose, OR 97056 503-543-7077 <a href="mailto:anita.ott@comcast.net">anita.ott@comcast.net</a>	Scappoose SD Columbia	39	K-8	<a href="http://www.scfschool.org">www.scfschool.org</a>

70.	Southwest Charter School	Sue Carter 5839 SW Hood Ave Portland, OR 97239 503-452-8929 <a href="mailto:suecarter@swcharter.org">suecarter@swcharter.org</a>	Portland SD Multnomah	35	K-6	<a href="http://www.swcharter.org">www.swcharter.org</a>
71.	Springwater Environmental Sciences School 9/06	Deb Odell PO Box 3010 16491 S Springwater Rd Oregon City, OR 97045 503-631-7700 <a href="mailto:deb@springwaterschool.com">deb@springwaterschool.com</a>	Oregon City SD Clackamas	85	K-4	<a href="http://www.springwaterschool.com">www.springwaterschool.com</a>
72.	St. Helens Arthur Academy	Michael Arthur 33035 Pittsburg Rd St Helens, OR 97051 503-366-7030 <a href="mailto:sthelensadmin@arthuracademy.org">sthelensadmin@arthuracademy.org</a>	St. Helens SD Columbia	100	K-4	<a href="http://www.arthuracademy.org">www.arthuracademy.org</a>
73.	Sweet Home Charter School 9/06	Mary Northern PO Box 190 1805 Long St Sweet Home, OR 97386 541-367-1833 <a href="mailto:mnorthernshcs@yahoo.com">mnorthernshcs@yahoo.com</a>	Sweet Home SD Linn	80	K-4	<a href="http://www.pieducation.net">www.pieducation.net</a>
74.	Three Rivers Charter School 9/01	Katherine Holtgraves 4975 Willamette Falls Drive West Linn, OR 97068 503-723-6019 <a href="mailto:kholtgraves@3rcs.org">kholtgraves@3rcs.org</a>	West Linn- Wilsonville SD Clackamas	100	4-8	<a href="http://www.3rcs.org">www.3rcs.org</a>
75.	Trillium Charter School 9/02	Stephanie Hinkle 5420 N Interstate Ave Portland, OR 97217 503-285-3833 <a href="mailto:info@trilliumcharterschool.org">info@trilliumcharterschool.org</a>	Portland Public Schools Multnomah	296	K-12	<a href="http://www.trilliumcharterschool.org">www.trilliumcharterschool.org</a>
76.	Upper Chetco Charter School 9/05	Karen Johnson 99603 N Bank Chetco River Rd. Brookings, OR 97415 541-412-9072 <a href="mailto:upperchetco@charterinternet.com">upperchetco@charterinternet.com</a>	Brookings-Harbor SD Curry	28	2-5	<a href="http://www.chetcoschool.com">www.chetcoschool.com</a>

77.	Village School 9/00	Martha Collins 2855 Lincoln St. Eugene, OR 97405 541-345-7285 <a href="mailto:village@4j.lane.edu">village@4j.lane.edu</a>	Eugene SD Lane	194	K-8	<a href="http://www.happyvillage.org">www.happyvillage.org</a>
78.	West Lane Technology Learning Center 9/03	Donna Garner 24936 Fir Grove Lane Elmira, OR 97437 541-935-2101 <a href="mailto:dgarner@lane.k12.or.us">dgarner@lane.k12.or.us</a>	Fern Ridge SD Lane	101	9-12	<a href="http://www.westlanetech.org">www.westlanetech.org</a>
79.	Westside Dual Language Charter School 9/06	Dan Patton 3685 Belmont Dr Hood River, OR 97031-9704 541-386-1535 <a href="mailto:dpatton@hoodriver.k12.or.us">dpatton@hoodriver.k12.or.us</a>	Hood River County SD Hood River	220	K-5	<a href="http://school.gorge.net/hrcsd/westside/">http://school.gorge.net/hrcsd/westside/</a>
80.	Willamette Leadership Academy 9/03	Roger McClelland 87230 Central Rd Eugene, OR 97402-9200 541-935-6815 <a href="mailto:rmcclell@lane.k12.or.us">rmcclell@lane.k12.or.us</a>	Fern Ridge SD Lane	78	6-12	<a href="http://www.pioneeryouthcorps.com">www.pioneeryouthcorps.com</a>
81.	Woodburn Arthur Academy 9/04	Jennifer Hale 591 Gatch St Woodburn, OR 97071 503-981-5746 <a href="mailto:woodburnadmin@arthuracademy.org">woodburnadmin@arthuracademy.org</a>	Woodburn SD Marion	88	K-2	<a href="http://www.arthuracademy.org">www.arthuracademy.org</a>

## Charter School Dates 2007-2008

Date	Time	Activity	Location	Contact
August 10	8:30-4:00	Incentive Grant Writing Workshop	ODE, Basement B	Margaret
September 21	By 5:00 pm	Incentive Grants due	ODE- postmarked, e-mailed, faxed	Donna
September 28	8:30-4:00	Charter School Forum	ODE, Basement B	Margaret
October 5	8:30 -4:00	Incentive Grant Reading	ODE, Basement A, Basement C, 200A	Margaret
October 18		Incentive Grant Awards	ODE	Margaret
November 1-2	8:30-4:00	Leadership Conference	TBA	Teresa/Margaret/Don
November 8	9-12	Incentive Project Director's Mtg.	ODE, Basement A	Margaret
December 5	9:30-12:30	District Forum	Salem-Keizer SD	Don/Joni/Margaret
January 22	8-5	Incentive Grant Writing Workshop	ODE, Basement A	Margaret
January 25	8:30-4:00	Charter School Forum	ODE, Basement A	Margaret
February 13	9-12	Dissemination Grant Writing Workshop	ODE, Basement A	Teresa
March 7	By 5:00 pm	Incentive grant due	ODE- postmarked, e-mailed, faxed	Margaret
March 19	8-5	Incentive Grant Reading	ODE, Basement A, B, C	Margaret
March 28	By 5:00 pm	Dissemination Grant due	ODE- postmarked, e-mailed, faxed	Teresa
April 16	8-5	Dissemination Grant Reading	ODE, Basement A, Basement B	Teresa
April 17		Incentive Grant Awards	ODE	Margaret
April 25	8:30-4:00	Charter School Forum	ODE, Basement A	Margaret
May 1	1-4	Incentive Project Directors Mtg.	ODE, Basement A	Margaret
May 15		Dissemination Grant Awards	ODE	Teresa
May 29-30	8:30-4:00	New Operator's Workshop for schools opening 08-09	TBA	Teresa
June 30		Federal Annual Report Due		Margaret

# Application for Funds

## **Oregon Public Charter School Dissemination Grant**

Application Deadline: March 28, 2008

Issued by the Oregon Department of Education  
Public Charter School Program

Send completed application to:

Oregon Department of Education  
Office of Educational Improvement and Innovation  
Attn: Teresa Schneiderman  
255 Capitol St. NE  
Salem, OR 97310-0203

*Every Student, Every Day – A Success*

Oregon Public Charter School Dissemination Grant Program  
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## **Background**

The Oregon Public School Charter Law was enacted in May 1999. This legislation provides an opportunity for teachers, parents, and community members to “create new, innovative, more flexible ways of educating all children within the public school system” by offering local communities the opportunity to design and operate schools that individualize and customize education for their students.

Charter schools are public schools of choice, selected by students and parents for their unique offerings. The essential characteristics of any Oregon public charter school are school-centered governance, autonomy, and a clear design for what and how students will learn. Each public charter school is considered a district school; however, it is exempt from many state laws and rules. Public charter schools must incorporate state content standards into their curriculum, participate in the statewide assessment system, and comply with all health, safety and civil rights laws.

In the nine years since Oregon’s Public Charter School Law was enacted, 96 public charter schools have opened their doors. There are approximately 40 additional public charter school developers at various stages of the preoperational phase. In October of 2005, the Oregon Department of Education was awarded an additional \$7,000,000 under Title V, Part B of the Elementary and Secondary Act – Public Charter Schools Program. Ten percent of the award is for the purpose of awarding dissemination grants to eligible public charter schools. As a result of this competitive grant process, several qualified public charter schools will have the opportunity to share their best practices or assist developing public charter schools in 2008-09, when the dissemination grants are awarded.

## **Dissemination Grant: General Information**

**Purpose of Dissemination Grant:** The purpose of this application is to fund proposals to support activities that share effective practices resulting from the first three years of charter school operation. This grant opportunity supports public charter schools' efforts to form bridges with the larger system; to share best practices in improving student achievement; and to transform specific successes and lessons learned into broader reforms.

Grant writers should focus on activities that:

- have proven successful (having been implemented for a minimum of one year),
- help improve existing public charter schools or regular public schools,
- open new schools (including public charter schools),
- share the lessons learned by public charter schools, and
- create and/or disseminate materials that will assist in the operation of public charter and/or traditional public schools.

**Amount of Funds Available:** The Oregon Department of Education will award up to \$200,000 in this round of funding. Dissemination grants are expected to range from \$40,000 to \$60,000 per year, for two years. Specific awards may be adjusted to more accurately reflect reasonable project scope and costs.

**Eligible Applicants:** Public charter schools in operation for at least three consecutive years are eligible to apply for a dissemination grant. Eligible public charter schools must also have demonstrated overall success to apply for a dissemination grant.

According to federal guidance, "overall success" of a public charter school includes, but is not limited to:

- substantial progress in improving student achievement
- high levels of parent satisfaction, and
- the management and leadership necessary to overcome initial start-up challenges and establish a thriving, financially viable public charter school.

A public charter school may receive a dissemination grant whether or not it has previously received a planning and/or incentive grant. Public charter schools that have been in operation for at least 3 years are listed in Attachment D.

Collaboration and partnerships are encouraged in developing dissemination activities. The following describes possible types of partnerships that may be undertaken:

- A single, eligible public charter school may apply under one single grant application and one grant award to develop and disseminate sound practices to one or more public schools (charter and traditional).
- Eligible public charter schools may apply in partnership with one or more public charter schools under one single grant application and one grant award to develop, and disseminate sound practices to schools within and outside of the partnership.

**Length of Grant Awards:** The maximum length of a dissemination grant project is 24 months from the time of the award, though applicants may propose a shorter project period. If the application is funded for a two-year period, the second year of funding is contingent upon ODE receiving a satisfactory progress report (due June 30, 2008), from the grant awardees, review of updated budget, and the availability of federal funds. If the grant is for a one-year period, the public charter school may again apply for funds (through the competitive grant process) for additional activities for a second year. All awardees must complete a final report, due June 30, 2009.

### **Review Process**

Dissemination grant applications will be reviewed by a broad-based committee of individuals supportive of the systemic reform of public education, the public charter school concept, and knowledgeable of educational and organizational concepts embodied in school reform. Review criteria will be based upon the specific indicators listed in this RFP.

**Permissible Use of Funds:** Authorized dissemination activities include assisting other public charter schools by:

- Assisting other individuals with the planning and start-up of one or more new public schools (including public charter schools) that are independent of the assisting public charter school and the assisting public charter school's developers.
- Developing partnerships with other public schools (including public charter schools) designed to improve student performance in each of the schools participating in the partnership, including improved student performance in the disseminating school.
- Providing curriculum materials, assessments and other materials that promote increased student achievement, and are based on successful practices within the assisting public charter school.
- Providing materials that document the successful practices of the assisting public charter school and are designed to improve student performance.
- "The grantee shall ensure that any publication that contains project materials also contains the following statements:

*The contents of this (insert type of publication; e.g., book, report, film) were developed under a grant from the Department of Education. However, those contents do not necessarily represent the policy of the Department of Education, and you should not assume endorsement by the Federal Government."* EDGAR 75.620(b)

Applicants must target one or more of the fundable activities (listed above) in their grant proposal.

A public charter school may NOT use:

- dissemination grant funds for regular operating expenses,
- dissemination grant funds, either directly or through a contractor, for marketing or recruitment activities designed to promote the public charter school or for general operating purposes, and

- **grant funds to implement activities, programs, etc. to be disseminated at a later date.**

Grant funds MAY BE used to develop materials **documenting current** successful practices of the public charter schools for the educational purpose of assisting other schools in improving student academic achievement. Any public charter school receiving a dissemination grant must provide thorough and high-quality information that meets the needs of other schools trying to learn from the public charter school's experience.

**Application Timeline:** A public charter school may apply for the dissemination grant during any grant cycle after March of their third year of operation. The State Board will award the grant funds.

**Required Format:** The applicants must follow the required format in order to assure a consistent application of evaluation criteria. **Grant applications formatted in ways other than outlined below will be returned to the applicant and will not be scored.** Please use this as a checklist before submitting your application:

- 20 page maximum (not including attachments)
- All pages must be standard letter size, 8-1/2" X 11"
- 12 point Arial font
  - Tables, charts, diagrams, etc. may be included using double space and 12 point Arial font
- 1 inch on all margins (top, bottom and sides)
- Double-spaced
- Document footer with the name of charter school and page numbers on each page

Grant applications not following these criteria may be disqualified. In all cases, that portion of the application exceeding the space limitations described above will not be considered for scoring by the grant readers.

**Required Information:** Submit your grant application **in the order listed.** The attachments are required to have a **complete** grant application. **Grant applications with an omitted section or with sections out of order may be returned to the applicant and may not be scored.**

- Application Cover Page (Attachment A)
- Assurances Signature Page (Attachment B)
- Required Narrative, 20 page maximum (Elements #1-5)
- Budget Worksheet (Attachment C)

## Post-Award Requirements

Every eligible applicant awarded grant funds under this program must agree to meet all requirements of federal law governing the Public Charter Schools Grant Program and any applicable state requirements. Once the public charter school has received notification they have been granted funds, they have 90 days in which to submit a revised, final budget and any other necessary forms or they will forfeit their grant. Any post-award changes to the budget must be approved by the Oregon Department of Education.

Successful grant applicants may be required to provide a copy of the complete application in electronic format (HTML or Microsoft Word version 6 for Windows or higher). Awarded applications may be posted on the ODE Charter School's website. **However, do not submit your electronic files with the initial application.**

Grant recipients may be asked to present a workshop at Oregon Charter School Conferences. Costs associated with conducting the workshop at the conference may be paid using grant funds, and such costs should be built into the budget and budget narrative portion of the application.

The grantee shall maintain accounting records and other evidence pertaining to costs incurred, with the provision records to be kept available by the grantee during the grant period and thereafter for three full years from the date of final payment. ODE must be permitted to audit, review, and inspect the grantee's activities, books, documents, papers, and records relating to the expenditures of grant proceeds during the period of the grant and for three years following final payment.

**Technical Assistance:** Technical Assistance is available by contacting Teresa Schneiderman, 503.947.5648 or [teresa.schneiderman@state.or.us](mailto:teresa.schneiderman@state.or.us).

## Narrative Grant Components:

### 1. Abstract of Proposal (2 page maximum) Required for funding **10 points**

- Baseline information
  - How the school was established
  - Number of years the charter has been in operation
  - Number and grade levels of pupils served
  - Demographic characteristics of student population
- Specify project period (not to exceed two years) and include a detailed timeline (timeline must be double spaced).
- **List at least three project objectives with performance measures and quantifiable indicators. Project objectives should be specific, measurable, attainable, and time-phased. If the project is in any way academically related, at least one project objective must use OSAT results and Adequate Yearly Progress as an indicator.**
- Describe how the project will meet the needs of the school being assisted and/or developing school and the amount of funding you are requesting.
- Explain the collaboration, partnership or mentoring program that will be used.
- Specifically detail how dissemination grant meets the objectives of the project and addresses an identified need.
- Address how effective practices will be distributed; include compilation techniques and planned distribution.
- If a product will be developed, describe the material and how public schools will benefit or student academic achievement will be increased. Primary measure must include the Oregon Statewide Assessment.

### 2. Description of Public Charter School and Evidence of Overall School Success (5 pages maximum) **25 points**

- A. The Public Charter School's Educational Vision
  - Documented success in achieving mission and overall program goals.
  - Noted specific educational objectives that have been accomplished through the school.
- B. Educational Capacity of the School (Substantial Progress in Student Achievement)
  - Identify rigorous standards in all curriculum areas and various assessment measures used.
  - Identify assessment measures used – in addition to OSAT.
  - Show student performance and achievement data (including Oregon Statewide Assessment and other measures of academic success) improvement.
  - Indicate the number and percentage of students participating in Oregon Statewide Assessment.

- C. Business and Organizational Management Capacity of the School  
(Management and leadership necessary to overcome initial start-up problems and establish a thriving, financially viable public charter school)  
Evidence of:
- the overall fiscal viability of the school,
  - effective governance and administrative structure, and
  - overall stability (facilities, management and leadership, audit reports).
- D. Collaboration and Networking Partnerships  
Evidence of:
- successful collaboration within the school,
  - collaboration and partnerships with other organizations outside of the school, and
  - role and relationship with authorizing agency.
- E. Other Indicators of Success (High Levels of Parent Satisfaction)  
Level of:
- parent satisfaction as indicated by survey or other means as described in application,
  - satisfaction of authorizing agency (renewals and evaluations),
  - growth in student population (include data), and
  - program expansion (include data).

3. Description of High Quality Dissemination Project (6 pages maximum) **25 points**

A. Needs Assessment

- Provide a description of the needs assessment that was completed in order to design the project. Include the summative results, on the assessment instrument, in an attachment.
- Describe the number of schools contacted, how many responded and the greatest needs identified.
- Correlate the needs assessment with the project design.
- Explain how the chosen delivery model (e.g. printed materials, workshops, audio visual materials, one-on-one training) best meets the identified needs.
- Describe how the needs assessment relates to project objectives.
- Describe how the project will produce the anticipated results.

B. Description of the Overall Dissemination Project

- Identify the specific area (curriculum, assessment, finance, governance, community relations, professional development, etc.) that will be the focus of the dissemination activities.
- Describe the objectives and performance measures of the dissemination project.
- Describe the overall dissemination project, including the number of students and number and types of schools that will benefit from the project.
- Describe the methods and process for dissemination.

- C. Accountability (address all that apply)
- Describe how the school being assisted will be held to at least the same level of accountability as the assisting public charter school, e.g. adherence to ODE Academic Content Standards, improved OSAT results, etc.
  - Describe how parents are involved in the accountability program.
  - Describe the product being developed and how it will assist other public schools.
  - Describe the process for dissemination of the products developed and how any necessary training will be addressed.

4. Viability of the Project and Soundness of Planning (3 pages maximum) **20 points**

- A. Capacity for applicant to succeed in the proposed project
- Provide evidence of your success in the specific area that has been selected for dissemination.
  - List the individuals involved in and responsible for this project. Provide evidence the personnel involved with the project are well qualified and will provide the expertise necessary to accomplish stated goals.
  - Describe who will be responsible for each project activity and how their expertise matches the project goals and the needs identified in the needs assessment. Include all people working on the project (e.g. bookkeeper, subproject staff, etc.). Attach a resume for each lead person.
- B. Planning, Assessment and Procedures for Monitoring Project Goals
- Provide timeline for completion of specific tasks and how progress will be monitored.
  - Describe monitoring and evaluation plans to ensure project goals are achieved and recipients are given the opportunity to provide feedback.
  - Include a strong project **evaluation plan** which outlines success indicators
- C. Budget (Worksheet and Narrative – Attachment C)
- Describe the use of funds for all planned activities. The narrative should break down the budget for each school involved and reflect the activities during entire project period
  - Describe the process for how the grant money will be spent and the reasonableness of the grant budget in relation to the proposed activities.

5. Value of the Dissemination Project (4 pages maximum) **20 points**

- A. Benefit of the project to the applicant school and the educational community in general
- Justify need for the project to applicant and potential recipients.
  - Describe value of the product or activities to educational reform.
  - Describe how the project will improve student performance and/or improve educational accountability for the applicant and recipient schools.
  - Clearly describe outreach strategies, methods and process for dissemination.

# Scoring Guide

## Criteria

1. Abstract of Proposal (**Required**) (2 page maximum) **10 points**
- Baseline information includes all the following.
    - How the school was established,
    - Number of years the charter has been in operation,
    - Number and grade levels of pupils served, and
    - Demographic characteristics of student population
  - Project period is specified (not to exceed two years) and includes a detailed timeline (timeline must be double spaced).
  - At least three project objectives are listed with performance measures and quantifiable indicators. Project objectives are specific, measurable, attainable, and time-phased. If the project is in any way academically related, at least one project goal must use OSAT results and Adequate Yearly Progress as an indicator.
  - The project meets the needs of the school being assisted and/or developing school. The amount of funding requested is indicated.
  - The collaboration, partnership or mentoring program that will be used is explained.
  - Detail is included as to how the dissemination grant meets the objectives of the project and addresses an identified need.
  - Abstract addresses how effective practices will be distributed; includes compilation techniques and planned distribution.
  - If a product will be developed, a description of the material and how public schools will benefit is included (i.e. student academic achievement will be increased). Primary measure must include the Oregon Statewide Assessment.
2. Description of Public Charter School and Evidence of Overall School Success (5 page maximum) **25 points**
- A. Educational Vision
- There is evidence that:
- The public charter school has a well-articulated vision and mission and has accomplished the goals set forth in their charter.
  - Specific educational objectives accomplished through the school were noted.

#### B. Educational Capacity

There is evidence that:

- The school has established and made progress toward rigorous standards in all curricular areas and measures success through a wide variety of assessment measures.
- The school is able to demonstrate other indicators of success.
- Student performance and achievement data (OSAT and other measures of academic success) are noted and show improvement.
- The number and percentage of students participating in the Oregon Statewide Assessment is indicated.

#### C. Organizational Capacity

There is evidence that:

- The school demonstrates fiscal and operational soundness over time.
- A clearly defined and stable governance/administrative structure supports the goals of the charter.
- Overall stability (facilities, management and leadership, audit reports, etc.).

#### D. Collaboration

There is evidence that:

- Collaboration occurs within the school.
- Collaboration and partnerships have been established with organizations outside of the school.
- The role and relationship with the authorizing agency has been established and described.

#### E. Indicators of Success

There is evidence that:

- The level of parent satisfaction has been determined and described.
- The level of satisfaction of the authorizing agency, growth in student population, and/or program expansion has been addressed.

### 3. Description of High Quality Dissemination Project (6 page maximum) **25 points**

#### A. Needs Assessment

There is evidence that:

- The specific area that will be the focus of the dissemination project meets an established need based on a clearly defined needs assessment.
- The summative results are included in an attachment.
- The needs assessment is correlated with the project design.
- The number of schools contacted (if any) is indicated.
- The chosen delivery meets the identified needs.
- The needs assessment relates to the project objectives.
- The project will produce the anticipated results.

B. Overall Dissemination Project

The following are described:

- the proposal is clear, well planned and reasonable,
- the specific area (curriculum, assessment, finance, governance, community relations, professional development, etc.) that will be the focus of the dissemination activities,
- the objectives and performance measures of the dissemination project,
- the overall dissemination project, including the number of students and number and types of schools that will benefit from the project, and
- the methods and process for dissemination.

Consider also:

- Are the project objectives and performance measures consistent with the applicant's proven, successful practices?
- Does the project plan clearly describe the work product that will result from the grant and the individuals responsible for each component of the project?

C. Accountability for all grant participants (address all that apply)

The applicant has described:

- how the school being assisted has consented to being held to at least the same level of accountability as the assisting public charter school, e.g. adherence to ODE Content Standards, improved OSAT results, etc.,
- how parents are involved in the accountability program,
- the product being developed and how it will assist other public charter and traditional schools, and
- the process for dissemination of the products developed and how any necessary training will be addressed.

4. Viability of the Project and Soundness of Planning (3 page maximum) **20 points**

A. Capacity for applicant to succeed in the proposed project

There is evidence of:

- success in the specific area that has been selected for dissemination,
- the personnel involved with the project are well qualified and will provide the expertise necessary to accomplish stated objectives

B. Planning, Assessment and Procedures for Monitoring Project Objectives

- A realistic timeline for completion of specific tasks and how progress will be monitored is in evidence.
- There are monitoring and evaluation plans to ensure project objectives are achieved and recipients are given the opportunity to provide feedback.
- The application includes a strong project **evaluation plan**, which outlines success indicators.

C. Project Viability

- The use of funds for each planned activity is described. The narrative breaks down the budget for each school involved and reflects the activities during entire project period.
- The process for how the grant money will be spent and the reasonableness of the grant budget in relation to the proposed activities is included.

5. Value of Dissemination Grant (4 page maximum)

**20 points**

A. There is evidence the proposal:

- is clearly focused on an area of need in the education or charter community that has not been and cannot be met by other sources,
- project objectives and performance measures are highly consistent with effective school change/improvement,
- is clearly convincing that the completion of the proposed grant-funded activities will lead to improved student performance or improve educational accountability for the applicant and/or recipient schools, and
- outreach strategies, methods, and process for dissemination are clearly described.

Cover page

(Attachment A)

# Oregon Public Charter School Dissemination Grant Program

Name of Charter School:	
Name of School District:	
Fiscal Agent:	Fiscal Manager:
Project Director:	
Address:	Phone:
	E-mail:
Date of Opening:	Current Enrollment

Focus of Grant: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

### Enrollment History

Year	Total Grades	Total Enrollment
<i>Example 1998-99</i>	<i>6,7,8</i>	<i>135</i>

Funds Requested (Year) \_\_\_\_\_ \$ \_\_\_\_\_

Funds Requested (Year) \_\_\_\_\_ \$ \_\_\_\_\_

**TOTAL FUNDS REQUESTED** \$ \_\_\_\_\_

**ASSURANCES REQUIRED**

(Attachment B)

Public Charter school, which accepts funding through the Oregon Public Charter School Grant Program, agrees to the following assurances:

1. An assurance that the applicant will annually provide the U.S. Secretary of Education and the Oregon Department of Education such information as may be required to determine if the public charter school is making satisfactory progress toward achieving the funded activities. This includes participation in any federal or state funded public charter school evaluations or studies.
2. An assurance that the applicant will cooperate with the U.S. Secretary of Education and the Oregon Department of Education in evaluating the program being assisted.
3. An assurance that the school is nonsectarian in its programs, admissions policies, and employment practices.
4. An assurance that the school operates in accordance with State laws.
5. An assurance that the school agrees to comply with the same Federal and State audit requirements, as do other public schools in the State and that arrangements have been made to finance those mandatory audits.
6. An assurance that the school complies with the Age Discrimination Act of 1975, Title VI of the Civil Rights Act of 1964, Title IX of the Education Amendments of 1972, section 504 of the Rehabilitation Act of 1973, and Part B of the Individuals with Disabilities Education Act.
7. An assurance that the school meets all applicable Federal, State, and local health and safety requirements.
8. An assurance that the school's admission process will not discriminate against anyone regarding race, gender, national origin, color, disability, or age.
9. An assurance that the school will admit students on the basis of a lottery, if more students apply than can be accommodated.
10. An assurance that the public charter school is in at least its third year of operation.
11. An assurance that the school will comply with all timeline and reporting requirements.
12. An assurance that the grantee shall maintain accounting records and other evidence pertaining to costs incurred, with the provision that the records shall be kept available by the grantee during the grant period and thereafter for three full years from the date of final payment. ODE must be permitted to audit, review, and inspect the grantee's activities, books, documents, papers and records relating to the expenditures of grant proceeds during the period of the grant and for three years following final payment.
13. An assurance that the public charter school will submit a revised budget narrative and budget to ODE within 90 days of notification of a grant award.
14. An assurance that the public charter school has provided the school district with "adequate and timely notice" of this grant application.

*It is the responsibility of each local public charter school-district partnership that receives funds under this grant to comply with all required federal assurances. Funded sites will be expected to cooperate with the Department in the development and submission of certain reports to meet certain state and federal guidelines and requirements. All grantees must work with and provide requested data to the successful contractor(s) in the evaluation of Oregon public charter schools.*

In addition, funded projects will be required to maintain appropriate fiscal and program records. Fiscal audits of funds under this program are to be conducted by the recipient agencies annually as a part of their regular audit. Auditors should be aware of the Federal audit requirements contained in the Single Audit Act of 1984.

**IF ANY FINDINGS OF MISUSE OF FUNDS ARE MADE, PROJECT FUNDS MUST BE RETURNED TO THE OREGON DEPARTMENT OF EDUCATION.**

The Oregon Department of Education may terminate a grant award upon thirty (30) days notice if it is deemed by the Oregon Department of Education that the applicant is not fulfilling the funded program as specified in the approved project application.

The applicant may subcontract for work to be performed, but shall retain sole responsibility for the project and shall be the only direct recipient of funds. Project modifications and changes in the approved budget may be requested in writing and be approved in writing by the Oregon Department of Education before modifications are made to the expenditures. Teresa Schneiderman, Education Specialist, will be the contact person for any modifications. Her contact information is: e-mail address [teresa.schneiderman@state.or.us](mailto:teresa.schneiderman@state.or.us); telephone number is (503) 947-5648.

**SIGNATURES of Assurances**

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District Administrator Date

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Charter School Board Chair Date

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Charter School Administrator Date

---

Person Preparing Grant Date

**NOTE:** The No Child Left Behind Act, Title V, Part B [20 USC 7221c. Section 5204, (e)(4)(B)] states, "A local educational agency may not deduct funds for administrative fees or expenses from a subgrant awarded to an eligible applicant, unless the applicant enters voluntarily into a mutual agreed upon arrangement for administrative services with the relevant local educational agency. Absent such approval, the local educational agency shall distribute all subgrant funds to the eligible applicant without delay."

## BUDGET INSTRUCTIONS

The budget worksheet and narrative must support the activities that are proposed in the application. There must be a clear relationship between the proposal activities and where the funds are going to be spent.

Please remember no grant funds can be obligated or spent until a final budget has been received and approved by the Oregon Department of Education. Grant disbursements will be made upon receipt of an eligible request for reimbursement.

Examples of the types of expenses that may be included in each object category are listed below for guidance only. Your budget narrative should give enough detail so that the appropriate object category can be confirmed.

1. **Salaries** Amounts paid for personnel services for both permanent and temporary employees.
2. **Employee Benefits**-Benefits paid for both permanent and temporary employees.
3. **Purchased Services**-Consultant fees, professional educational services and other services performed by persons or firms with specialized skills and knowledge. Also property services to operate, repair, or maintain school property. Other purchased services could include items such as telephone, travel, printing and postage expenditures.
4. **Supplies/Materials**-office supplies, books, and other general supplies.

Some expenditures may cross object category lines. For example, community services or parental involvement may include salaries, purchased services (printing) and supplies/materials. The budget narrative should identify these elements so a total cost of the activity can be determined.

## Oregon Public Charter School Dissemination Grant Budget Worksheet

Project Site \_\_\_\_\_

In the budget detail, please describe expenditures for grant activities using the following categories: 1. Salaries/stipends, 2. Employee benefits, 3. Purchased services, 4. Supplies/materials

Description of Activity	Budget Category	Total Request
	1. 2. 3. 4.	
<b>Total</b>		

**ELIGIBLE PUBLIC CHARTER SCHOOLS**

The following public charter schools have been in operation at least three full academic years.

<b>Public Charter School</b>	<b>Sponsor</b>	<b>Year Opened</b>
Lincoln City Career Tech	Lincoln County SD	2000-2001
Ridgeline Montessori (one year)	Eugene SD	2000-2001
Luckiamute Valley Charter School	Dallas SD	2001-2002
Multisensory Learning Academy	Reynolds SD	2001-2002
Arthur Academy	David Douglas SD	2002-2003
Columbia County Education Campus	St. Helens SD	2002-2003
Mosier Charter School	North Wasco County SD	2002-2003
Sand Ridge Charter School	Lebanon SD	2002-2003
Center for Advanced Learning	Gresham-Barlow SD	2003-2004
Eddyville Charter School	Lincoln County SD	2003-2004
Emerson School	Portland Public Schools	2003-2004
Four Rivers Community School	State of Oregon	2003-2004
Oregon Coast Technology School	North Bend SD	2003-2004
Sheridan Japanese School	Sheridan SD	2003-2004
Siletz Valley School	Lincoln County SD	2003-2004
West Lane Technology Learning Center	Fern Ridge SD	2003-2004
Willamette Leadership Academy	Fern Ridge SD	2003-2004
Bethany Charter School	Silver Falls SD	2004-2005
Blue Mountain Charter School	South Lane SD	2004-2005
Camas Valley School	Camas Valley SD	2004-2005
Child's Way Charter School	South Lane SD	2004-2005
Ione Charter School	Ione SD	2004-2005
Jane Goodall Environmental MS	Salem-Keizer SD	2004-2005
Nixyaawi Community School	Pendleton SD	2004-2005
North Columbia Academy	Rainier SD	2004-2005
Reynolds Arthur Academy	Reynolds SD	2004-2005
Riddle Education Center	Riddle SD	2004-2005

SEI Academy	Portland Public Schools	2004-2005
South Columbia Family School	Scappoose SD	2004-2005
Woodburn Arthur Academy	Woodburn SD	2004-2005
Three Rivers Charter School	West Linn-Wilsonville SD	2001-2002
Arts and Technology Charter High	West Linn- Wilsonville SD	2005-2006
Baker Charter School	Salem-Keizer SD	2005-2006
Clackamas Web Academy	North Clackamas SD	2005-2006
Days Creek Charter School	Douglas County SD	2005-2006
Deschutes Edge Charter School	Redmond SD	2005-2006
International School of the Cascades	Redmond SD	2005-2006
Milwaukie Academy of the Arts	North Clackamas SD	2005-2006
MITCH Sherwood Charter School	Sherwood SD	2005-2006
Oregon Connections Academy	Scio SD	2005-2006
Phoenix School of Roseburg	Douglas County SD	2005-2006
Portland Arthur Academy	Portland Public SD	2005-2006
Upper Chetco Charter School	Brookings-Harbor SD	2005-2006

### Charter Schools Previously Awarded Dissemination Grants

Public Charter School	Sponsor	Year Opened
Howard Street	Salem-Keizer SD	1997-1998
Sojourner Institute	North Clackamas SD	1998-1999
Lourdes	Scio SD	1999-2000
Armadillo Technical Institute	Phoenix-Talent SD	2000-2001
Ridgeline Montessori (one year)	Eugene SD	2000-2001
Village School	Eugene SD	2000-2001
CM2 Opal School	Portland Public SD	2001-2002
King's Valley Charter School	Philomath SD	2001-2002
REALMS	Bend-La Pine SD	2001-2002
Lighthouse School	North Bend SD	2002-2003

<b>Optimum Learning Environment</b>	<b>Salem-Keizer SD</b>	<b>2002-2003</b>
<b>MITCH Charter School</b>	<b>Tigard-Tualatin SD</b>	<b>2002-2003</b>
<b>Trillium Charter School</b>	<b>Portland Public SD</b>	<b>2002-2003</b>
<b>Network Charter School</b>	<b>Eugene SD</b>	<b>2003-2004</b>
<b>New Urban High School</b>	<b>North Clackamas SD</b>	<b>2003-2004</b>
<b>Paisley Charter School</b>	<b>Paisley SD</b>	<b>2003-2004</b>
<b>Clackamas Middle College</b>	<b>North Clackamas SD</b>	<b>2004-2005</b>

Donna Newbeck

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[newbeckfamily@q.com](mailto:newbeckfamily@q.com)

**Current Position:** Office Specialist 2; Oregon Department of Education  
**Responsibility:** Support for: Charter Schools, 21<sup>st</sup> Century Schools, Middle School Improvement, Schools To Watch, GED Option Program, Service Learning

### Highlights:

- 1999-2008 **Charter School Grant Support Staff:** support for grant and charter school team
- 2004-2008 **21<sup>st</sup> Century Schools, Middle School Improvement, Schools To Watch, GED Option Program, Service Learning:** support for these programs, some of which have grants
- 2003-2007 **Physical Education Support Staff:** support for PE Ed. Specialist, content standards for PE
- 1998-2003 **Grants and Content Panels:** support for various grants and content panels
- 1995-1998 **Cashier and head vault teller for the Oregon Food Stamp Program**

### Education Background:

- 1998-2008 Professional development training, grant management training, procurement training
- 1985-1986 Basic Computer Programming – Home Study
- 1977-1979 Modern Beauty College – general studies, including business management
- 1977 One term at Walla Walla College – general studies, technical and business writing
- 1977 Graduated high school

### Responsibilities and Achievements:

- 1999-2008 **Charter Schools:** support the Federal Charter School Program Grant, provide assistance to charter school developers, operators, and public explaining policy and procedure for charter school grant application, claiming funds, assist with grant application to the U.S. Department of Education, assist with the handbook and directory, maintain charter school files, general support the charter school team

- 2004-2008 **21<sup>st</sup> Century Schools, Middle School Improvement, Schools To Watch, GED Option Program, Service Learning:** support for these programs, some of which have grants, maintain files, answer question about policy and procedure
- 2003-2007 **Physical Education Support Staff:** support for PE Ed. Specialist, content standards for PE
- 1998-2003 **Grants and Content Panels:** support for Goals 2000 Grants, Professional Development Grant, Character Education Grant, Superintendent's Reading Corps Grant, Social Science and Content panel, English Language Arts and Reading Content Panels
- 1995-1998 **Cashier and head vault teller for the Oregon Food Stamp Program:** kept accurate records of amount of food stamps used each month, responsible for mailing out food stamps each month, food stamp tracking for legal matters, helped in changing program from food stamps to EBT debit card.

**DONALD STEPHEN WILDFANG**

(b)(6) 6025 Lone Oak Rd S.E. · Salem, Oregon 97306

(b)(6) 503-585-1916 home · 503-580-1712 office · (b)(6)dfang@hotmail.com

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My mission is to bring servant leadership to students, schools and systems.  
My vision is to foster communication, personal and professional development,  
global thinking and strategic planning.

---

**Education**

Master of Science, Education 1986  
Concentration: Critical Thinking/Problem Solving  
Western Oregon University, Monmouth, OR  
Bachelor of Science, Elementary Education, WOU 1978

Licensure:

Oregon Continuing Superintendent - Portland State University (June 2001)  
Oregon Basic Superintendent 090 - PSU 1997  
Oregon Standard Administrative 074 - PSU 1991  
Oregon Standard Elementary 014 - WOU 1986

**Professional Experience**

Oregon Department of Education 2006-Present  
Educational Consultant; Leadership Coach 2006-Present  
Morrison Campus Alternative Charter School 2003-2006  
Executive Director and Founder  
Dallas School District, Dallas, Oregon: 1978-2003  
Principal of Morrison Campus – district alternative education 1998-2003  
Principal of Rural Elementary Schools 2000-2002  
Director of Title I and E.L.L. 1998-2001  
Director of Support Services and Principal of Morrison Kindergarten 1997-98  
Principal, LaCreole Middle School 1993-97  
Assistant Principal, LaCreole Junior High School 1989-93  
Principal and 4th Grade Teacher, Bridgeport Elementary School 1988-89  
6th Grade Teacher, Oakdale Heights Elementary School 1978-88  
Residential Land Developer 1979-95  
Construction Firm Owner and Heavy Equipment Operator 1971-78  
United States Navy (Western Pacific Theater) 1969-71

**Professional Memberships**

Oregon Middle Level Association (Charter Member) 1990-Present  
National Association of Secondary School Principals 1988-Present  
Oregon Association of Secondary School Principals 1988-Present  
Confederation of Oregon School Administrators (COSA) 1988-Present  
Association for Supervision and Curriculum Development 1986-Present  
Phi Delta Kappa 1985-Present

**Community Service**

Salem Alliance Church men's leadership team	2000-Present
Dallas Budget Committee	1998-2000
Dallas Comprehensive Planning Committee	1997-2000
Rotary International - Dallas Chapter	1994-2000
Youth Committee Chair	1998-99
Sergeant at Arms	1997-98
Membership Committee	1995-96
Keynote Speaker, Dallas High School Baccalaureate	1991

**Leadership Experience**

Founder and Executive Director of Morrison Campus Alternative Charter	2002-2006
Developer of Morrison Alternative Program and campus	1998-2003
<p>Developed the first school in Dallas to serve at risk youth (grades 6 to 12); hired five teachers, one secretary and an assistant. The program was both academic and character-based with a major focus on developing Individualized Student Plans. The focus also assessed the instructional effectiveness of Dallas School District K-12 and recommended appropriate modifications. In 2000 the school converted to a grades 9-12 enrollment. Various community and state partnerships and alliances were forged to provide community service and career related opportunities. Worked with John Schoon to draft legislation for a tax-incentive to employers of at-risk youth; the bill passed and became the First Break Program.</p>	
Directed the conversion of La Creole Jr. High to a Middle School	1993-96
<p>As building principal a \$5 million bond was passed to convert to a middle school program. The campus was expanded by 44,000 sq. ft. and remodeled. Oversaw the construction project and created grade level teams to implement a broad based, experiential learning school. Originated Site Council, Parent Advisory Committee</p> <p>Developed Volunteer Program, converted the Junior High to a Middle School concept</p>	
Adjunct Faculty, College of Education, WOU	1996-2006
Oregon Talented and Gifted Regional Planning Group	1990-96
<p>Moderator, TAG in Rural High Schools Panel - 1992</p>	
Elementary Education Advisory Committee Chair, WOU	1989-92
<p>The Middle Level Endorsement at WOU is a direct result of this group's efforts</p>	
Middle School Planning Committee, Dallas	1989-91
Confederation of Oregon School Administrators (COSA)	1988-92
<p>Administrator Mentor Program, Salem</p>	
The Oregon Assessment Center (COSA)	1987

**Awards/Recognition**

John Pence Memorial Award for Service to Middle Level Education from the Oregon Middle Level Association	1995-96
Volunteerism Recognition, WOU	1992

01/08

# Request for Proposals



## Oregon Public Charter School Incentive Grant Program

A Grant Opportunity for Title V, Part B  
Charter Schools Program  
No Child Left Behind Act

2008-09 APPLICATION

Issued by the  
Oregon Department of Education  
Office of Education Improvement and Innovation  
255 Capitol Street NE  
Salem, OR 97310-0203

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## Introduction

The Public Charter Schools Grant Program (PCSGP) is authorized by 20 U.S. Code sections 7221-7221j, and is administered by the U.S. Department of Education.

In August, 2005, Oregon received a three-year PCSGP award to support the continued development of high-quality charter schools in the state. The State Board of Education (SBE) is the authorized state educational agency for the PCSGP, and the Oregon Department of Education (ODE) administers the state's program on its behalf.

## General Information

### **Purpose of Grant**

The general purpose of the PCSGP are to:

- **Provide financial assistance** for the planning, program design, and initial implementation of high quality charter schools.
- **Expand the number** of high-quality charter schools available to students.  
High-quality charter schools are defined as charter schools that have been serving students for three years and:
  - ❖ achieve Adequate Yearly Progress (AYP) goals.
  - ❖ have no material exceptions or deficiencies in their most recent audit.
- **Evaluate the effects** of charter schools on students, academic achievement, staff and parents.

The Incentive Grant funds are intended to assist charter schools in meeting planning and implementation needs during the initial 36 months.

There are three phases of this grant:

- **Planning** – up to **18 months** preceding charter school operation.
- **Implementation & Continued Implementation**– up to **24 months** of initial operation of charter school.

Since this is a competitive grant, it is possible some applications may not be funded. There is no guarantee the submission of an application will result in funding or that funding will be allocated at the level requested. All funding is contingent upon continued federal funding.

**Priorities:** Priority will be given to charter school applications that:

- Emphasize flexible and innovative educational opportunities that will assist at-risk and under-served students to achieve state content and performance standards.
- Provide parent choice not available in geographic areas, urban or rural, in which a large proportion or number of public schools have been identified for improvement, corrective action or restructuring.

## Federal Definition of a Charter School

Grant applicants must conform to the definition of a public charter school in the No Child Left Behind Act [P.L.107-110, section 5210(1)] in order to be eligible for Public Charter School grant funds. The definition is as follows:

*A public school that:*

(A) in accordance with a specific State statute authorizing the granting of charters to schools, is exempt from significant State or local rules that inhibit the flexible operation and management of public schools, but not from any rules relating to the other requirements of this paragraph;

(B) is created by a developer as a public school, or is adapted by a developer from an existing public school, and is operated under public supervision and control;

(C) operates in pursuit of a specific set of educational objectives determined by the school's developer and agreed to by the authorized public chartering agency;

(D) provides a program of elementary or secondary education, or both;

(E) is nonsectarian in its programs, admissions policies, employment practices, and all other operations, and is not affiliated with a sectarian school or religious instruction;

(F) does not charge tuition;

(G) complies with the Age Discrimination Act of 1975, Title VI of the Civil Rights Act of 1964, Title IX of the Education Amendments of 1972, section 504 of the Rehabilitation Act of 1973, and Part B of the Individuals with Disabilities Education Act;

(H) is a school to which parents choose to send their children, and that admits students on the basis of a lottery, if more students apply for admission than can be accommodated;

(I) agrees to comply with the same Federal and State audit requirements as do other elementary and secondary schools in the State, unless such requirements are specifically waived for the purpose of this program;

(J) meets all applicable Federal, State, and local health and safety requirements;

(K) operates in accordance with State law; and

(L) has a written performance contract with the authorized public chartering agency in the State that includes a description of how student performance will be measured pursuant to State assessments that are required of other schools and pursuant to any other assessments agreeable to the authorizing agency.

**Accountability:** Charter schools are results-oriented institutions. Charter schools must develop clear and measurable goals to which they agree to be held accountable.

By applying for this grant:

- 1) funded grant sites agree to be held accountable for the school and student goals as outlined in an ensuing charter and
- 2) funded grant sites assure these goals will provide the basis for the charter school's annual report.

**Allowable Expenditures:** (Budgets are reviewed for non-allowable expenditures and reasonableness of costs)

1. Stipends and consulting fees are allowed for curriculum and professional development.
2. Accounting fees are allowable for planning, development and training.
3. Attorney fees are allowable for start-up expenses.
4. Minor renovations are limited to compliance with code, classroom dividers, and expenditures for the health and safety of children as defined in federal, state and local laws, such as heating/cooling, handicapped accessibility, electrical/lighting, plumbing and safety alarms. Developer should be prepared to provide documentation to support claims for minor renovations.
5. Administrative fees must be reasonable.
6. Construction or purchase of facilities is **NOT** an allowable expense.

**Application Process:** The Charter School Incentive Grant has the following three phases:

**Phase One:** Competitive Planning Grant (Year One) of up to \$55,000.

- Access up to \$25,000 upon State Board of Education grant approval.
- Remainder \$30,000 is conditional upon sponsor approval of charter proposal.

**Phase Two:** Non-competitive Implementation Grant (Year Two) of up to \$225,000 (\$125,000 + (projected number of students X \$1000)). Criteria for receiving the Implementation Grant (Year Two) grant award includes compliance with ORS 338, submission of an approved charter, and the approval of the Planning Phase Progress Report and Implementation Revised Budget.

**Phase Three:** Non-competitive Continued Implementation Grant (Year Three) of up to \$225,000 [\$100,000 + (projected number of students X \$1000)]. Criteria for receiving the Continued Implementation Grant (Year Three) grant award includes compliance with ORS 338, the approval of the Implementation Progress Report (including accountability plan) and Continued Implementation Revised Budget, and submission of the annual evaluation turned in to the local school district as per charter agreement.

**Assurances:** Review the Title V: Public Charter School Program Requirements and Assurances carefully before signing (pages 21-22).

**Business Capacity:** Charter School Statute requires charter schools to follow state financial accounting procedures.

**Cost of Preparing an Application:** Costs of preparing and delivering grant applications are the responsibility of the applicant and may not be charged to the grant.

**Eligible Applicants and Fiscal Agent:**

**Applicants may submit a proposal for only ONE incentive grant per round.**

It is expected the charter school developer will be working in partnership with the local school district. However, the signature of the superintendent is not required and does not bind or commit the school district to award a charter. The signature of the district superintendent acknowledges the planning grant funds will be passed through the district to the charter school. The Implementation and Continued Implementation Phase funds may go directly to the charter school.

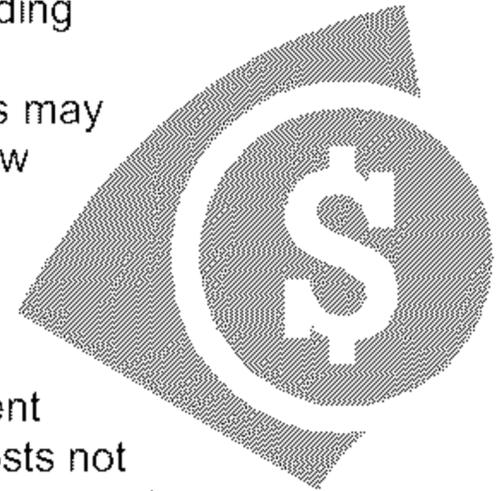
An Incentive grant will not be awarded to support any school affiliated with any religious or sectarian institution or that discriminates on the basis of religion, gender, race, ethnicity, national origin or disability in either hiring or admission. Charter school applicants must adhere to all laws and regulations pertaining to health and safety, and civil rights applicable to public schools.

Applicants must carefully review and charter schools must fully comply with Oregon Revised Statute (ORS) Chapter 338. Charter schools receiving Charter School Program grant funds must agree to comply with the Non-regulatory Guidance for the Charter School Program issued by the U.S. Department of Education.

**Expenditure of Funds:** Project modifications and/or changes in the approved budget must be requested and approved in writing by the Oregon Department of Education Project Director **BEFORE** these modifications and/or changes are made. If grant funds are used for activities not indicated in the application without prior approval, grant funds may be recaptured.

**Fundable Activities:** Under the allowable activities described in Public Law 107-110, Title V, Part B, Section 5204 (f) (3), grant funds must be used for the following:

1. Post-award planning and design of the educational program, including refinement of the desired educational program or professional development for teachers who will work in the charter school. This may also include planning activities that will lead to the opening of a new charter school such as evaluation of curriculum options, school design models, refinement of the charter school's educational program, and other planning activities.
2. Initial Implementation of the charter school, including: informing the community about the school, acquiring the necessary equipment and educational materials and supplies, other initial operational costs not met from state/local sources, and other initial operating costs that can not be met from state and local funds. Initial implementation activities tend to be the "nuts and bolts" activities necessary for the actual opening of the charter school and follow the post-award planning and design process.



**National Association of Charter Authorizers (NACSA) Membership:** Planning grant recipient's local school district will receive a one year membership to NACSA to assist them in the challenge of chartering a successful charter schools. The Budget Worksheet (Attachment C) includes the reference to district membership to NACSA. The membership amount is in addition to the \$60,000 allowed to the developing charter school.

**Selection of Grant Awards:** The Oregon PCSGP is highly competitive. The application clearly identifies the score value of each element of the application. Federal law for the PCSGP requires peer review of applications. Oregon's reviewers include charter developers; charter school governing board members, operators, authorizers, other charter experts, and ODE staff. Readers will be required to remove themselves from the evaluation of any application for which they have a *perceived or real conflict of interest*.

ODE may establish minimum eligibility standards for funding and may revise the amount of the actual grant award requested. All decisions of the State Board of Education on the awarding and funding of grants are final.

**Staffing:** Quality instruction is one of the most important determinants of student achievement. Charter School statute **requires** the instructional staff be licensed or registered by TSPC.

### **Appeal Process**

Applicants may request the comments and final score of the review panel. An appeal of a grant award decision may be filed by submitting a written request for a hearing within 30 days of receiving official notification from the ODE their application was not approved for a grant award. Requests to appeal the denial of a grant award must identify a violation by the ODE of a state or federal statute or regulation in failing to approve an application, or failing to award funds in amounts in accordance with the requirements of statutes and regulations, or failing to comply with Oregon' approved 2005-2008 CSP application. See Appendix H to review federal appeal procedures [34 *Code of Federal Regulations* 76.401(c) (d) (2)-(7)].

Requests to appeal should be addressed to:

Oregon Department of Education  
Public Charter Schools Grant Program  
255 Capitol St. NE  
Salem, OR 97310

### **Grant Monitoring**

The ODE will monitor grants by reviewing and approving budget worksheets prior to each phase and may request additional information from the grantee, verify information with the authorizing entity, require the submission of invoices and receipts, or use any other appropriate and legal means to obtain such verification. The ODE will also conduct site visits to grantees during the grant project period. Prior to these monitoring visits, the grantee may be required to submit additional relevant information that will allow the ODE to conduct a useful, efficient, and effective visit. All information in these reports is subject to verification.

## Application Requirements:

### Required Information

Submit your grant application **in the order listed**. The attachments are required to have a **complete** grant application. **Grant applications with an omitted section or with sections out of order will be returned to the applicant and will not be scored.**

#### 1. Cover Sheet (Attachment A)

The *Cover Sheet* must be **complete** and **signed** by the eligible applicant's authorized agent (see Appendix A for the definition of authorized agent). If the application is submitted by e-mail, it must be submitted by the person authorized to sign the grant application.

#### 2. Assurances Signature Page (Attachment B)

Superintendent's signature does not bind or commit the School District Board to approve a proposal or award a charter.

#### 3. Abstract of Proposal & Application Narrative (Questions 1-10)

In a one-page *Abstract*, summarize the key components of your grant proposal. The name of the proposed charter school should be at the top of the *Abstract*. The *Application Narrative*, including supporting documentation, graphics or tables, and a budget narrative, **must not exceed 20 pages** in length.

Applicants should not copy language from grant applications of other developers that resulted in a grant award.

#### 4. Budget Worksheets (Attachment C, D, E)

You may use as many pages as necessary to provide a comprehensive list of expenditures. The *Budget Sheet* form can be extended to as many lines as necessary by using the tab key to add rows.

#### 5. Three-Year Operational Budget (Attachment F)

**Required Format:** The applicants must follow the required format in order to assure a consistent application of evaluation criteria. **Grant applications formatted in ways other than outlined below will be returned to the applicant and will not be scored.** Please use this as a checklist before submitting your application:

- 20 page maximum (not including attachments)
- All pages must be standard letter size, 8-1/2" X 11"
- 12 point Arial font
- 1 inch on all margins (top, bottom and sides)
- Double-spaced
- Document footer with the name of charter school and page numbers on each page
- Tables may be included using double space

The application needs to be sent electronically to:

Donna Newbeck  
[donna.newbeck@state.or.us](mailto:donna.newbeck@state.or.us)

Or

Fax: 503-378-5156  
by 5:00 p.m.

**Attachment A and B, with original signatures, must be mailed and received within one week of due date.**

**General Requirements:** The electronic file must be received by 5:00 p.m. of the due date. Proposals received after this time will not be considered. Attachment A and B, with original signatures, must be mailed and received within one week of due date.

**Required Narrative Questions and Criteria:** Applicants should respond, in sequence, to all of the following questions in **twenty** pages or less (not including required Attachments). **Application questions may be restated in single space and smaller font.** Each applicant must convince the grant review team the proposal will result in a quality educational program sustainable charter school. Special focus will be placed on the applicant’s soundness of planning and the ability to link the specific activities described in the grant project to the charter school’s educational vision and project goals.

If you are unable to address narrative elements #5, 6 (B), or 7 (C) at this time, please indicate what is in place now and provide a detailed timeline of activities indicating how and when the element will be developed.

Each question will be scored using the **scoring criteria** with the following scoring guide.

4	<b>Exceeds</b> criteria
3	<b>Meets</b> criteria
2	<b>Most</b> of the criteria are met
1	<b>Some</b> of the criteria are met
0	<b>None</b> of the criteria are met

**Oregon Public Charter School Program  
Incentive Grant**

4	<b>Exceeds</b> criteria
3	<b>Meets</b> criteria
2	<b>Most</b> of the criteria are met
1	<b>Some</b> of the criteria are met
0	<b>None</b> of the criteria are met

**1. Abstract of Project and Project Goals**

**5%**

- A. Briefly describe your charter school, include the general educational program, the school community, the targeted enrollment, the school's overall origin and the vision of the school.
- B. List at least 5 project goals (for the Planning, Implementation and Continued Implementation Phases) for the proposed grant. At least one of these goals must address student academic achievement of all students, as measured by the Oregon State Assessment System. Each listed goal must be specific, measurable, and time-phased. Project goals (goals of all three phases of the Incentive grant) should align with school's goals that are discussed in Narrative Element 6, but they are not the same.

<b>Criteria</b>
➤ Clearly describes how the charter school originated, its vision and school community
➤ Clearly describes the target enrollment and the general education plan
➤ Project goals (for the Planning, Implementation and Continued Implementation Phases) are specific, measurable and time phased and provide compelling evidence that the funds will be used wisely
➤ Project goals clearly align with the school's goals

4	<b>Exceeds</b> criteria
3	<b>Meets</b> criteria
2	<b>Most</b> of the criteria are met
1	<b>Some</b> of the criteria are met
0	<b>None</b> of the criteria are met

## 2. Purpose of School

15%

Identify which of the following nine goals of ORS Chapter 338 the public charter school intends to meet. For one goal identified, provide a paragraph or two describing how the school's vision and educational program will meet this goal. *Note: Not all the ORS Chapter 338 goals need to be addressed.*

- A. Increase student learning and achievement.
- B. Increase choices of learning opportunities for students.
- C. Better meet individual student academic needs and interests.
- D. Build stronger working relationships among educators, parents and other community members.
- E. Encourage the use of different and innovative learning methods.
- F. Provide opportunities in small learning environments for flexibility and innovation, which may be applied, if proven effective, to other public schools.
- G. Create new professional development opportunities for teachers.
- H. Establish additional forms of accountability for schools.
- I. Create innovative measurement tools.

Criteria
<ul style="list-style-type: none"> <li>➤ Identified goal clearly describes how the school's vision and education program will meet this goal</li> </ul>

4	<b>Exceeds</b> criteria
3	<b>Meets</b> criteria
2	<b>Most</b> of the criteria are met
1	<b>Some</b> of the criteria are met
0	<b>None</b> of the criteria are met

### 3. Demographics/Need

15%

- A. Provide a description of the community and the local schools in which the charter school is to be located.
- B. Discuss the demographics of the student population to be served by the proposed charter school.
- C. Provide evidence that demonstrates the existence of sufficient need for the proposed charter school within the community.

Criteria
➤ The description of the community and local schools demonstrates sufficient need for the proposed charter school within the community
➤ The description of the student population to be served demonstrates sufficient need for the proposed charter school within the community

### 4. Parent and Community Support

15%

- A. Describe how parents and other members of the community **were** and **will be** involved in the design and implementation of the school.
- B. Describe the composition of the governing board (e.g. parents, community members or staff) and their responsibilities and decision-making authority.

Criteria
➤ Describes in detail how parents or community members <b>were</b> and <b>will be</b> integrally involved in the design and implementation of the school
➤ Evidence of strong parent/community leadership and involvement on the governing board, including their responsibilities and decision-making authority

4	<b>Exceeds</b> criteria
3	<b>Meets</b> criteria
2	<b>Most</b> of the criteria are met
1	<b>Some</b> of the criteria are met
0	<b>None</b> of the criteria are met

## 5. Education Program

10%

- A. Describe the comprehensive, research-based educational program that is or will be implemented by the charter school. The description should include any packaged curriculum programs your school will use, as well as a typical school day.
- B. Describe how the program is designed to support state and local academic standards.
- C. Describe the school's plan to align the curriculum with state content standards.
- D. Describe the classroom structure and the types of instructional methods (experiential learning, cooperative learning, direct instruction) that will be used.

Criteria
➤ Educational program is well described <b>or</b> there is a detailed timeline of activities indicating how and when this will be addressed
➤ Education program clearly supports and uses state content standards <b>or</b> there is a detailed timeline of activities indicating how and when this will be addressed
➤ The school's plan to align the curriculum with state content standards is clearly described <b>or</b> there is a detailed timeline of activities indicating how and when this will be addressed
➤ Classroom structure and types of instructional methods are well described <b>or</b> there is a detailed timeline of activities indicating how and when this will be addressed

4	<b>Exceeds</b> criteria
3	<b>Meets</b> criteria
2	<b>Most</b> of the criteria are met
1	<b>Some</b> of the criteria are met
0	<b>None</b> of the criteria are met

## 6. Accountability

10%

- A. Describe the school's accountability plan to the district, parents and students, include the school goals. The goals must be specific, measurable and time-based.
- B. Describe the student goals. State at least two academic goals, one of which must be measured by the Oregon State Assessments and at least two non-academic goals. Describe how the progress toward these goals will be assessed annually (attendance, instances of disruptive behavior, entrance into post-secondary programs, etc). If no student goals are in place, include a detailed timeline of activities to address this element.

### Criteria

- Broad and thorough accountability plan, outlining both school and student goals
- Convincing evidence of academic and non-academic student goals that are specific and measurable and how the progress toward these goals will be assessed annually **or** convincing evidence of how the timeline of activities proposed will address narrative element 6 (B)

## 7. Staffing

10%

- A. Identify the school staff composition, include the **number** of administrators, licensed staff, registered staff, paraprofessionals, non-teaching staff.
- B. Describe the responsibilities each staff will be expected to assume.
- C. Describe the charter school's professional development plan and goals.

### Criteria

- Strong description of staff composition
- Detailed description of staff responsibilities addresses all components of a school operation
- Detailed description of the charter school's professional development plan and goals **or** convincing evidence of how the timeline of activities proposed will address narrative element 7(C)

4	<b>Exceeds</b> criteria
3	<b>Meets</b> criteria
2	<b>Most</b> of the criteria are met
1	<b>Some</b> of the criteria are met
0	<b>None</b> of the criteria are met

**8. Project Budget Narrative (Plus Attachments C, D, & E) 10%**

- A. Provide an overview of how **grant** funds will be used to address project goals and meet the needs of the charter school.
- B. Fully describe the proposed budget, include a justification or rationale for each activity.

Criteria
➤ Budget overview completely supports the project goals (Planning, Implementation and Continued Implementation phases) and meets the needs of the school
➤ The description of the proposed budget is detailed and includes a justification or rationale for <b>each</b> activity

**9. Business Capacity/Continued Operation 10%**

- A. Describe how the business office practices and policies at the charter school **were** or **will be** established.
- B. Complete the three-year operational budget (Attachment F). Include revenues and expenditure projections. Describe any assumptions used in the projection of all revenue and expenditure items.
- C. Describe the rationale used to estimate enrollment in the first year of school operation and any projected enrollment growth in the second and third years' of operation.

Criteria
➤ Thorough description of business practices and policies and how they <b>were</b> or <b>will be</b> established
➤ Comprehensive, well-thought out three year operational budget that will result in fiscal viability Assumptions used in the projection of revenue and expenditure items are clearly described
➤ Convincing rationale used to estimate student enrollment for first, second and third years' of operation

4	<b>Exceeds</b> criteria
3	<b>Meets</b> criteria
2	<b>Most</b> of the criteria are met
1	<b>Some</b> of the criteria are met
0	<b>None</b> of the criteria are met

## 10. Priority

**20 points**

- A. Describe the outreach planned to encourage at-risk and underserved students to enroll in the charter school.
- B. Describe how parent choice will be provided in geographic areas not currently served by charter schools or where public schools have been identified for improvement, corrective action or restructuring.

Criteria
➤ Convincing evidence of strategies to encourage at-risk and underserved students to enroll in the charter school
➤ Convincing evidence of parent choice in geographic areas not currently served by charter schools and where public schools have been identified for improvement, corrective action or restructuring

## Definitions

**At-risk student:** A student who is at least one year behind in satisfactory completion of course work or obtaining credits for graduation, pregnant or a parent, economically deprived using measures such as free and reduced lunch, homeless or has been homeless within the preceding six months, has limited English proficiency, has been suspended from school three or more times, or has been referred by the school district for enrollment in an alternative program.

**Charter School:** A public school of choice, selected by students and parents for its unique offerings. School-centered governance, autonomy and a clear design for what and how students will learn are essential characteristics of charter schools. Charter schools must be open to ALL students in the school district and provide a lottery if the number of applications exceeds capacity.

**Charter School Development Team:** Individuals actively involved in the planning and design of the charter school.

**Continued Implementation (Year Three):** Grant awards to continue the implementation phase.

**Developer:** An individual or group of individuals (may include teachers, administrators and other school staff, parents, or other members of the local community) involved in the development of a charter proposal.

**Eligible Applicant:** An authorized public chartering agency participating in a partnership with a developer to establish a charter school in accordance with this program.

**Equipment:** Items costing more than \$5,000. This could include items such as a copier or computer.

**Implementation Phase (Year Two):** Grant awards to an approved charter school for the purposes of executing the educational and organizational goals of the charter proposal.

**Planning Phase (Year One):** Grant awards to an eligible applicant for the purposes of developing a charter proposal for approval by a local school district (maximum of 18 months).

**Purchased Services:** Consultant fees, professional educational services and other services performed by persons or firms with specialized skills and knowledge. Travel, expenses related to conferences and meetings, staff and governing board development and the dissemination of information on the charter school would also be considered purchased services. Out of state travel must be pre-approved in writing by the Oregon Department of Education project director.

**Other Expenses:** Any items not classified above. This category should be very limited in the amounts and type of items included. A detailed explanation of all items in this category must be included.

**Salaries/Employee Benefits:** Amounts paid for personal services for both permanent and temporary employees. Amounts for instruction, planning, administration, etc. should be itemized. A pre-approval is required from the Oregon Department of Education project director for amounts over \$5,000 paid to one individual.

**Supplies/Materials:** Textbooks, instructional materials, office supplies, telephone, printing, postage and reproduction costs.

## Application Packet Checklist/ Required Components

### Application Instructions:

(Grant applications not following these requirements will not be scored)

**Required Information:** Organize your grant application in the order listed. The attachments are required to have a **complete** grant application. Grant applications not following this order will not be scored

- Application Cover Page (Attachment A)
- Assurances Signature Page (Attachment B) (Superintendent's signature does not bind or commit the School District Board to approve a proposal or award a charter.)
- Required Narrative (Elements # 1-10), (20 page maximum)
- Planning, Implementation and Continued Implementation Budget Worksheets (Attachment C, D and E)
- Three Year Operational Budget (Attachment F)

**Required Format:** The applicants must follow the required format in order to assure a consistent application of evaluation criteria. Grant applications not following this format will not be scored. Please use this as a checklist before submitting your application:

- 20 page maximum (not including attachments)
- All pages must be standard letter size, 8-1/2" X 11"
- 12 point Arial font
- 1 inch on all margins (top, bottom and sides)
- Double-spaced
- Document footer with the name of charter school and page numbers on each page
- Tables may be included using double space

The application needs to be sent electronically to:

Donna Newbeck

[donna.newbeck@state.or.us](mailto:donna.newbeck@state.or.us)

Or

Fax: 503-378-5156

by 5:00 p.m.

**Attachment A and B, with original signatures, must be mailed and received within one week of due date.**

For technical assistance regarding your application, please contact:

Margaret Bates, Project Director

503-947-5615

[margaret.bates@state.or.us](mailto:margaret.bates@state.or.us)

**Oregon Public Charter School Incentive Grant  
Application Cover Page  
Attachment A**

Name of Proposed Charter School: \_\_\_\_\_

Local School District: \_\_\_\_\_

Superintendent of Local School District: \_\_\_\_\_

County: \_\_\_\_\_

Project Director:	
Address:	
Phone:	e-mail:
Fax:	

Fiscal Agent: (School District)	Contact Name:
Address:	
Phone:	e-mail
Fax:	

Phase	Year	Projected Enrollment	Grades	Projected Grant Request
One: Planning				
Two: Implementation				
Three: Cont'd Implementation				

Please list names and addresses of the individuals involved in the planning of the proposed charter school.

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.

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Charter School Developer(s) Signatures

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Date

**Assurances Signature Page**  
**Attachment B**

Charter schools/district partnership(s) that accept funding through the Oregon Charter School Grant Program agree to the following assurances:

1. An assurance the applicant will annually, for the life of the charter, provide the U.S. Secretary of Education and the Oregon Department of Education such information as may be required to determine if the charter school is making satisfactory progress toward achieving the funded activities. This includes participation in any federal or state funded charter school evaluations or studies.
2. An assurance the applicant will cooperate with the U.S. Secretary of Education and the Oregon Department of Education in evaluating the program being assisted.
3. An assurance that the school is nonsectarian in its programs, admissions policies, and employment practices.
4. An assurance the school complies with the Age Discrimination Act of 1975, Title VI of the Civil Rights Act of 1964, Title IX of the Education Amendments of 1972, section 504 of the Rehabilitation Act of 1973, and Part B of the Individuals with Disabilities Education Act.
5. An assurance the school agrees to comply with the same Federal and State audit requirements, as do other public schools in the State and that arrangements have been made to finance those mandatory audits.
6. An assurance the school meets all applicable Federal, State, and local health and safety requirements.
7. An assurance the school operates in accordance with applicable State law.
8. An assurance the school's admission process will not discriminate against anyone regarding race, gender, national origin, color, disability or age.
9. An assurance that the school will admit students on the basis of a lottery, if more students apply than can be accommodated.
10. An assurance the grantee shall maintain accounting records and other evidence pertaining to costs incurred, with the provision that the records shall be kept available by the grantee during the grant period and thereafter for three full years from the date of final payment. ODE must be permitted to audit, review, and inspect the grantee's activities, books, documents, papers and records relating to the expenditures of grant proceeds during the period of the grant and for three years following final payment.
11. An assurance modifications and/or changes to the budget will meet the approval of the Project Director.
12. An assurance the awarded grant funds will be spent or encumbered by July 31, 2008 unless an extension is requested by March 1, 2008.
13. An assurance the charter school has provided the school district with "adequate and timely notice" of the grant application.

*It is the responsibility of each local charter school and school district that receives funds under this grant to comply with all required federal assurances. Funded sites will be expected to cooperate with the Department in the development and submission of certain reports to meet certain state and federal guidelines and requirements. All grantees are required to provide requested data to ODE's contractor for the charter school evaluation study.*

In addition, funded projects will be required to maintain appropriate fiscal and program records. Fiscal audits of funds under this program are to be conducted by the recipient agencies annually as a part of their regular audit. Auditors should be aware of the Federal audit requirements contained in the Single Audit Act of 1984.

IF ANY FINDINGS OF MISUSE OF FUNDS ARE DISCOVERED, PROJECT FUNDS MUST BE RETURNED TO THE OREGON DEPARTMENT OF EDUCATION. The Oregon Department of Education may terminate a grant award upon thirty (30) days notice if it is deemed by the Oregon Department of Education that the applicant is not fulfilling the funded program as specified in the approved project application.

Grant recipients will be required to keep and maintain all equipment purchased with grant funds in accordance with the requirements of federal law and regulation. Should the charter school close, for any reason, the school district agrees to contact the Oregon Department of Education regarding assets purchased by this grant.

\_\_\_\_\_  
Charter School Representative Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
School District Representative Signature

\_\_\_\_\_  
Date

(School District Representative Signature does not bind or commit the School District Board to approve a proposal or award a charter.)

**OR**

\_\_\_\_\_  
Date charter school incentive grant was delivered or sent to School District Representative

**Attachment C**  
**Budget Worksheet**

**Planning Phase Stage 1**

Planning funds may be used for: a)Planning and design of educational programs, b)Professional development of staff and c)Development of charter application

Budget Categories:

- 1) Salaries
- 2) Benefits
- 3) Purchased Services
- 4) Supplies and Materials

Description and Timeline of Activity	Estimated Expense (Budget Category)	Total Request
<i>Develop, disseminate and evaluate survey to determine community support for charter school. Contract with marketing specialist to develop survey. Target date: April, 2000</i>	1. \$3,000 2. \$ 500 3. \$ 2,500 4. \$ 750	\$6,750
	1. 2. 3. 4.	
	1. 2. 3. 4.	
	1. 2. 3. 4.	

Description and Timeline of Activity	Estimated Expense Budget Category	Total Request
	1. 2. 3. 4.	
	1. 2. 3. 4.	
	1. 2. 3. 4.	
National Association for Charter Authorizers (NACSA) membership for local school district		\$1000
<b>Administrative Costs</b>		\$ _____
<b>Planning Grant Phase</b>		<b>Total Request</b> \$ _____

**Attachment C**  
**Budget Worksheet**

**Planning Phase Stage 2**

Planning funds may be used for: a)Planning and design of educational programs, b)Professional development of staff and c)Development of charter document/agreement

Budget Categories:

- 1) Salaries
- 2) Benefits
- 3) Purchased Services
- 4) Supplies and Materials

Description and Timeline of Activity	Estimated Expense (Budget Category)	Total Request
<p align="center"><b>Example</b></p> <p><i>Develop, disseminate and evaluate survey to determine community support for charter schools. Contract with marketing specialist to develop survey.</i></p> <p><i>Target date: September, 2006</i></p>	<p>1. \$3,000</p> <p>2. \$ 500</p> <p>3. \$ 2,500</p> <p>4. \$ 750</p>	<p align="center">\$6,750</p>
	<p>1.</p> <p>2.</p> <p>3.</p> <p>4.</p>	
	<p>1.</p> <p>2.</p> <p>3.</p> <p>4.</p>	
	<p>1.</p> <p>2.</p> <p>3.</p> <p>4.</p>	

Phase I (Planning Stage 2) Budget Worksheet  
Attachment C, continued

Description and Timeline of Activity	Estimated Expense Budget Category	Total Request
	1. 2. 3. 4.	
	1. 2. 3. 4.	
	1. 2. 3. 4.	
<b>Administrative Costs</b>		\$ _____

**Planning Grant Phase 2 Total Request \$ \_\_\_\_\_**

**Phase Two, Implementation Budget Worksheet**  
**Attachment D**

**Budget Calculation**

\$125,000 + (Projected Number of Students \_\_\_\_\_ x \$1000) = \$ \_\_\_\_\_

Base Allotment + the product of the projected number of students x \$1000 per pupil allotment = Total Phase 2 allocation (may not exceed \$225,000)

**Implementation and Continued Implementation funds may be used for:**

- a). Professional development of teachers and staff who will work in the charter school
- b). Development and dissemination of materials informing the community of the charter school
- c). Purchase of equipment and educational materials
- d). Development of curriculum materials
- e). Other initial operating costs that cannot be met from state or local sources

**Budget Categories:**

- 1. Salaries
- 2. Benefits
- 3. Purchased Services
- 4. Supplies and Materials
- 5. Capital Equipment

Description and Timeline of Activity	Estimated Expense (Budget Category)	Total Request
	1. 2. 3. 4. 5.	
	1. 2. 3. 4. 5.	

Description and Timeline of Activity	Estimated Expense (Budget Category)	Total Request
	1. 2. 3. 4. 5.	
	1. 2. 3. 4. 5.	
	1. 2. 3. 4. 5.	
<b>Administrative Costs (if needed)</b>		\$ _____

**Year Two, Implementation Estimated Budget**

**TOTAL \$** \_\_\_\_\_

Estimated Implementation Budget may not exceed the Budget Calculation from the previous page.

**Phase Three, Continued Implementation**  
**Budget Worksheet**  
**Attachment E**

**Budget Calculation**

\$100,000 + (Projected Number of Students \_\_\_\_\_ x \$1000) = \$ \_\_\_\_\_

Base Allotment + the product of the projected number of students x \$1000 per pupil allotment = Total Phase 2 Allocation  
(may not exceed \$225,000)

**Phase funds may be used for:**

- a). Professional development of teachers and staff who will work in the charter school
- b). Development and dissemination of materials informing the community of the charter school
- c). Purchase of equipment and educational material
- d). Development of curriculum materials
- e). Other initial operating costs that cannot be met from state or local sources

**Budget Categories:**

- 1) Salaries
- 2) Benefits
- 3) Purchased Services
- 4) Supplies and Materials
- 5) Capital Equipment

Description and Timeline of Activity	Estimated Expense (Budget Category)	Total Request
	1. 2. 3. 4. 5.	
	1. 2. 3. 4. 5.	

Description and Timeline of Activity	Estimated Expense (Budget Category)	Total Request
	1. 2. 3. 4. 5.	
<b>Administrative Costs (if needed)</b>		\$ _____

**Year Three, Continued Implementation Estimated Budget TOTAL \$ \_\_\_\_\_**

Estimated Implementation Budget may not exceed the Budget Calculation from the previous page.

**Three-Year Operational Budget**  
**Attachment F**

Category	Year 200____ (Implementation)	Year 200____ (Cont'd Implementation)	Year 200____ (No Federal Charter School Grant Funds)
<b>OPERATING REVENUE</b>			
Number of students			
Per pupil revenue (from General Purpose Grant per ADMw)			
<b>Total</b> received from General Purpose Grant			
Federal Charter School Grant			
Other			
Other			
Other			
<b>REVENUE TOTAL</b>			
<b>EXPENSES</b>			
<b>Personnel</b>			
Salary-Administration			
Salary-Teaching			
Salary-Contract			
Contracts			
Salary-Business, Clerical			
PERS			
Insurance			
Other Fringe Benefits			
<b>Personnel Subtotal</b>			
<b>Services and Activities</b>			
Staff Development			
Food Program			
Custodial			
Transportation/Field Trips			
Marketing			
Telephone			
Postage/Shipping			
Benefits			
Printing			
<b>Services and Activities Subtotal</b>			

Three-Year Operational Budget  
Attachment F, continued

Category	Year 200__	Year 200__	Year 200__
<b>Supplies and Equipment</b>			
Supplies-Instructional			
Audio-Visual Equipment			
Textbooks			
Assessment/Testing			
Technology/Internet			
Computers			
Furniture			
<b>Supplies and Equipment Subtotal</b>			
<b>Administration Costs</b>			
Printing			
Copier/Copier Lease			
Postage			
Telephone			
Dues/Memberships			
Marketing and Development			
<b>Administration Costs Subtotal</b>			
<b>Facilities and Capital Outlay</b>			
Rent			
Utilities			
Maintenance/Repairs			
Renovations			
<b>Facilities and Capital Outlay Subtotal</b>			
<b>TOTAL EXPENSES</b>			
<b>TOTAL REVENUES</b>			

# Oregon Charter School Program Grant

## Allowable Activities Q and A's

### 1. What activities are allowed under the Oregon Charter School Program Grant?

Activities for which charter schools grant funds may be used are limited to:

- A. Post award-planning and design of the educational program, which may include:
  - a. Refinement of the desired educational results and of the methods for measuring progress toward achieving those results;
  - b. Professional development of teachers and other staff who will work in the charter school; and
- B. Initial implementation of the charter school, which may include:
  - a. Informing the community about the school;
  - b. Acquiring necessary equipment and educational materials and supplies;
  - c. Acquiring or developing curriculum materials; and
  - d. Other initial operational costs that cannot be met from state or local sources.

### 2. Who determines what activities are allowable?

Allowable grant activities are determined by the Federal Charter School Program (ESEA, Title V, Part B, Part C—Public Charter Schools). These are described in the Non-regulatory Guidance and can be accessed at [www.ed.gov](http://www.ed.gov) or [www.uscharterschools@ed.gov](mailto:www.uscharterschools@ed.gov)

### 3. Can the grant funds be used to pay staff salaries?

No, Charter School grant funds cannot be used to pay for ongoing operational expenses, e.g. a teacher's monthly salary. These funds may be used to pay for professional development activities and additional time spent in developing the components (e.g. curriculum, student handbook, special education processes, etc.) of the charter school.

### 4. Can grant funds be used to contract for services?

Yes, Charter School Program (CSP) grant funds can be used to contract for services during the start-up and initial operating phase of the school. These contracted services might include legal, accounting, curriculum development or marketing. Contracted services that are part of the normal operating expenses (e.g. bookkeeping, legal fees, audits, etc.) are not allowable activities.

A charter school receiving CSP funds may enter into a contract with a for-profit entity to manage the charter school on a day-to-day basis. However, the charter school must be held by the state and the chartering authority to the same standards of public accountability and requirements that apply to all public charter schools.

### 5. We received donated items for some of the things requested in our budget. Can we change that line item in our budget?

Yes. Simply submit a revised budget to the ODE Charter Program Project Director for approval. The reallocated funds should be for something addressed in the project goals.

### 6. Our founders wrote our school's grant application. Now that the staff is hired, we'd like to change it. Can we?

Yes. Submit a revised budget to the ODE Charter Program Project Director for approval. Requested changes should still fit under the project goals. A narrative explaining the changes should be included with the revised budget.

**6. Can grant funds be used for the purchase of property?**

No, Charter School Program grant funds cannot be used for the purchase of, or down payment on, real property.

**7. Can grant funds be used to lease a building?**

No, CSP grant funds cannot be used to lease a building or to pay for any ongoing operational expenses. However, a maximum of three months of rent may be charged to the grant at the initial start-up phase. For example, if a school will not open until September, but needs to occupy the building during June, July and August, the rent for these months would be considered an allowable activity.

**8. Can grant funds be used to make capitol improvements on facilities?**

No, CSP grant funds cannot be used to make capitol improvements on facilities. The only exception to this is addressed in Question #9.

**9. Can grant funds be used for minor renovations to bring a building into compliance with all applicable Federal, State, and local health and safety requirements?**

Yes, CSP grant funds may be used for minor renovations to bring a building into compliance with all applicable Federal, State and local health and safety requirements. This might include installing a lift, building a ramp needed for accessibility, wiring for a computer lab or the installation of a sprinkler system. The maximum amount allowed for these activities is addressed in Question # 10.

**10. Will documentation of minor renovations to bring a building into compliance with all applicable Federal, State, and local health and safety requirements be required?**

This will be handled on a case-by-case basis. Documentation of the minor renovations to bring a building into compliance may be requested. Any renovations that, in total, exceed \$50,000 must be documented and approved by the Oregon Department of Education.

**11. Is there a maximum dollar amount that can be spent on minor renovations?**

It is recommended that grant funds allocated to minor renovations to bring a building into compliance with all applicable Federal, State, and local health and safety requirements not exceed \$50,000 of the implementation phase or \$30,000 of the continued implementation phase of the grant. Any renovations exceeding these amounts must be documented and approved by the Oregon Department of Education.

**12. Is there a restriction on the type of building that charter schools may lease?**

No, there is not a restriction on the type of building that a charter school may lease. For example, charter schools may be located in an office building, church basement, existing school or strip mall as long as the building meets all applicable Federal, State and local health and safety requirements.

**13. Are minor renovations to bring a building into compliance with all applicable Federal, State, and local health and safety requirements allowable if the charter school is leasing the building?**

Yes, minor renovations to bring a building into compliance with all applicable Federal, State, and local health and safety requirements can be done in a building the charter school is leasing. The terms of the lease would state that any renovations needed to bring a building up to code are the responsibility of the tenant and **may** become the property of the leaser.

**14. What happens to the assets purchased with grant funds if the charter school is terminated or dissolved?**

ORS 338.105 (6) states that, "If a charter is terminated or a public charter school is dissolved, the assets of the public charter school that were purchased with public funds shall be given to the State Board of Education. The State Board of Education may disburse the assets of the public charter school to school districts or other public charter schools." Additional information on the disposition of assets purchased with grant funds can be found in EDGAR 80.32 (<http://www.ed.gov/offices/OCFO/grants/edgar.html>).

**15. What happens to minor renovations purchased with grant funds if the charter school is terminated, dissolved or no longer leases the property?**

The minor renovations purchased with the grant funds to bring a building up to code may remain in the building if removing this would significantly diminish the value of the real property. For example, if a sprinkler system was installed to bring the building up to code and removing it would significantly diminish the value, the sprinkler system would remain in the building.

# Oregon Public Charter School Program Web Resources

## 1. Oregon Revised Statute (ORS Chapter 338)

<http://www.leg.state.or.us/ors/338.html>

## 2. Oregon Administrative Rules

<http://www.ode.state.or.us/policy/state/laws/lawsandlicensure.aspx>

## 3. No Child Left Behind

“The New ESEA (No Child Left Behind”): What It Means For Charter Schools”

[www.edreform.com](http://www.edreform.com)

[www.osba.org/hotopics/funding/nclb/index.htm](http://www.osba.org/hotopics/funding/nclb/index.htm)

[www.ode.state.or.us](http://www.ode.state.or.us)

## 4. Guidance on Federal Programs

[www.uscharterschools.org/pub/uscs\\_docs/fs/index.htm](http://www.uscharterschools.org/pub/uscs_docs/fs/index.htm)

## 5. Accessing Federal Programs

[www.uscharterschools.org/gb/fed\\_funds/](http://www.uscharterschools.org/gb/fed_funds/)

## 6. Applying Civil Rights Laws to Public Charter Schools

[www.uscharterschools.org/pdf/fr/civil\\_rights.pdf](http://www.uscharterschools.org/pdf/fr/civil_rights.pdf)

## 7. Public Charter School Program Non-regulatory Guidance

<http://www.uscharterschools.org/pdf/fr/cspguidance04.pdf>

## 8. The Charter School Guide to Federal Funds and Legal Responsibility

[www.bruman.com](http://www.bruman.com)

## Appendix A

### Education Department General Administrative Regulations For Appealing Decisions related to the PCSGP

#### 34 *Code of Federal Regulations* Section 80.43 **Enforcement**

- (a) Remedies for noncompliance. If a grantee or subgrantee materially fails to comply with any term of an award whether stated in a federal statute or regulation, an assurance, in a State plan or application, a notice of award, or elsewhere, the awarding agency may take one or more of the following actions as appropriate in the circumstances:....
- (3) wholly or partly suspend or terminate the current award for the grantee's or subgrantee's program.
- (b) Hearings, appeals. In taking an enforcement action, the awarding agency will provide the grantee or subgrantee an opportunity for such hearing, appeal, or other administrative proceeding to which the grantee or subgrantee is entitled under any statute or regulation applicable to the action involved.

#### 34 *Code of Federal Regulations* Section 76.783 **State educational agency action—subgrantee's opportunity for a hearing**

- (a) A subgrantee may request a hearing if it alleges that any of the following actions by the State educational agency violated a State or Federal statute or regulation:
- (1) Ordering, in accordance with a final State audit resolution determination, the repayment of misspent or misapplied Federal funds; or
- (2) terminating further assistance for an approved project.
- (b) The procedures in Section 76.401(d)(2)-(7) apply to any request for a hearing under this section.

#### 34 *Code of Federal Regulations* Section 76.401 (c) (d) (2)-(7)

- (a) If an applicant for a subgrant alleges that any of the following actions of a State educational agency violates a State or Federal statute or regulation, the State educational agency and the applicant shall use the procedures in paragraph (d) of this section:
- (1) Disapproval of or failure to approve the application or project in whole or in part.
- (2) Failure to provide funds in amounts in accordance with the requirements of statutes and regulations.
- (b) State educational agency hearing procedures.
- (2) If the applicant applied under a program not listed in paragraph (a) of this section, the State educational agency shall provide an opportunity for a hearing either before or after the agency disapproves the application.
- (3) The applicant shall request the hearing within 30 days of the action of the State educational agency.
- (4) (i) within 30 days after it receives a request, the State educational agency shall hold a hearing on the record and shall review its action.
- (ii) No later than 10 days after the hearing the agency shall issue its written ruling, including findings of fact and reasons for the ruling.**
- (iii) If the agency determines that its actions were contrary to State or Federal statutes or regulations that govern the applicable program, the agency shall rescind its action.**

**(5) If the State educational agency does not rescind its final action after a review under this paragraph, the applicant may appeal to the Secretary. The applicant shall file a notice of the appeal with the Secretary within 20 days after the applicant has been notified by the State education agency of the results of the agency's review. If supported by substantial evidence, findings of fact of the State educational agency are final.**

## **Appendix B**

### **Federal Laws**

**Age Discrimination - in Employment Act** generally prohibits employers from discriminating on the basis of age in the hiring, termination, benefits, or other terms and conditions of employment of individuals over 40 years of age. This act applies to public schools and employers who employ 20 or more employees. 29 U.S.C. §§621- 634. Information: Equal Employment Opportunity Commission 202-663-4900.

**Americans with Disabilities Act:** prohibits discrimination by an employer who employs 15 or more workers against a qualified individual with a disability. 42 U.S.C. § 12101-12213.  
[www.ed.gov/about/offices/list/ocr/index.html?src=mr](http://www.ed.gov/about/offices/list/ocr/index.html?src=mr)

**Bilingual Education Act** prohibits federally assisted education programs from excluding a student on the basis of a surname or language minority status. 20 U.S.C. §7401 et. seq. Information: U.S. Department of Education 202-205-5576.

**Boy Scouts of America Equal Access Act** no public school that provides an opportunity for one or more outside youth or community groups to meet on school premises or in school facilities before or after school hours shall deny equal access or a fair opportunity to meet to, or discriminate against, any group official affiliated with the Boy Scouts of America, or any other youth group listed in Title 36 of the United States Code as a patriotic society. <http://www.ed.gov/offices/OCR/boyscouts.html>.

**Charter School Expansion Act of 1998** requires school districts to ensure that every charter school receives the Federal funding for which it is eligible not later than five months after the charter school first opens. 20 U.S.C. § 10306. Information: Charter Schools Unit, Oregon Department of Education 503-947-5615. <http://www.ode.state.or.us/go/charterschools>

**Equal Pay Act** prohibits employers from paying wages to employees of one sex at rates of pay less than the rates they pay employees of the opposite sex for work requiring equal skill, effort, and responsibility, and which is performed under similar working conditions. 29 U.S.C. §206(d). Information: Wage and Hour Administrator of the U.S. Department of Labor 1-866-4USWAGE. (Request referral to regional office.)

**Fair Labor Standards Act** establishes minimum wage, overtime pay, equal pay, record keeping, and child labor standards for employees who are within the coverage of the FLSA and who are not exempt from specific provisions. 29 U.S.C. §201 et seq. (1988). Information: Wage and Hour Administrator of the U.S. Department of Labor 1-866-4USWAGE. (Request referral to regional office.)

**Family and Medical Leave Act:** requires employers with 50 or more workers in a 75-mile radius to provide eligible employees up to 12 work weeks of leave in a 12 month period when the leave is required for (1) birth, adoption or foster care placement, (2) care for a sick spouse or parent, or (3) a personal serious health condition. 29 U.S.C. § 2611 et. seq. [www.dol.gov](http://www.dol.gov)

**Family Educational and Privacy Rights Act** confers upon students (and their parents) rights of notice, access, amendment and confidentiality with regard to their educational records maintained by a school that received federal financial assistance. 20 U.S.C. § 1232g. Information: Family Policy Compliance Office, U.S. Department of Education 202-260-3887.  
<http://www.ed.gov/policy/gen/reg/ferpa/rights.html>

**Individuals with Disabilities Education Act** requires schools receiving federal financial assistance to provide a free and appropriate education to children with disabilities. 20 U.S.C. §1400, *et. seq.* Information: Office of Special Education Programs, U.S. Department of Education 202-205-9056.

**Immigration Reform and Control Act of 1986** creates civil and criminal sanctions for employers who fail to properly verify the employment eligibility of all workers hired after November 6, 1986. 8 U.S.C. §§1324a and 1324b (1988). Information: contact local Immigration & Naturalization Service. (Request information regarding Form I-9.)

**No Child Left Behind Act:** the reauthorization of the Elementary and Secondary Education Act, which contains provisions for defining a “highly qualified” teacher, testing and reporting requirements for states, and all of the federal education programs. [www.ed.gov](http://www.ed.gov)

**Occupational Health and Safety Act of 1970** regulates health and safety in the workplace, including handling and disposal of materials that may contain blood-borne pathogens. 29 U.S.C. §651 *et. seq.* (1993). Information: Occupational Health and Safety Administration, U.S. Department of Labor 1-800-321-6742.

**Omnibus Transportation Employee Testing Act of 1991** requires to conduct pre-employment/pre-duty, reasonable suspicion, random and post-accident alcohol and controlled substances testing of each applicant for employment or employee who is required to obtain a commercial driver’s license. 49 U.S.C. §2717. Information: Department of Transportation Office of Drug Enforcement and Program Compliance 202-366-3784.

**Rehabilitation Act of 1973** (Section 504) prohibits recipients of federal funds from discriminating against an individual on the basis of disability. 29 U.S.C. §§700 *et. seq.* (1994). Information: Office of Special Education Programs, U.S. Department of Education 202-2059056.

**Title VI of the Civil Rights Act of 1964**, as interpreted by the U.S. Supreme Court in *Lau v. Nichols*, 414 U.S. 563 (1974) and the United States Court of Appeals for the 5th Circuit in *Castaneda v. Pickard*, 648 F.2d 989 (5<sup>th</sup> Cir. 1981), requires public schools to provide any alternative language programs necessary to ensure that national origin minority students with limited-English proficiency have meaningful access to education programs. 42 U.S.C. §2000d *et. seq.* (1993). Information: Office of Civil Rights, U.S. Department of Education 202-205-5413.

**Title VII of the Civil Rights Act of 1964** forbids employers who have 15 or more employees to discriminate against individuals in all areas of the employment

**Title IX of the Education Amendments of 1972** prohibits gender-based discrimination by an educational institution that receives federal financial assistance. 20 U.S.C. 1681 Information: Office of Civil Rights, U.S. Department of Education 202-205-5413.

## Joni Gilles

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### EDUCATION

2003 Admission to University of Oregon Educational Leadership Doctoral Program  
1996 – 1997 Portland State University; Portland, OR; School Administration  
1983 – 1993 Western Oregon State College, Monmouth, OR; MA. Degree in Education  
1971 – 1972 University of Loyola, Los Angeles; Teaching Certificate  
1967 – 1971 College of St. Teresa, Winona, MN; BA Degree  
1970 – 1969 University of Vienna, Austria  
1964 – 1967 Bishop Montgomery High School, Torrance, CA; Graduate

### ADMINISTRATIVE EXPERIENCE

2002-Present	Oregon Department of Education, Director	
1999 – 2002	Oregon Department of Education, Salem, OR	Education Specialist
1997 – 1999	Howard Street Charter School (Middle School) Salem, OR	Principal
1992 – 1995	St. Joseph School, Salem, OR	Principal
1984 – 1991	St. Joseph School, Salem, OR	Activities Coordinator/ Athletic Director
1982 – 1983	Sacred Heart Academy, Salem, OR	Activities Director

### CURRENT RESPONSIBILITIES.

- Manage and provide leadership for the following Oregon Department of Education programs
  - Middle School Improvement
  - Oregon Public Charter School Program
  - Reading First
  - 21<sup>st</sup> Century Community Learning Centers
  - Service Learning
  - Alternative (Public and Private) Schools
  - Private Schools
- Responsible for implementing Oregon's Charter School Legislation (SB 100)
- Created Task Force that included Charter School stakeholders to ensure implementation fidelity
- Oversee Oregon Public Charter School Grant Program
- Coordinate all State Board Charter School activities (including waiver requests, appeals for sponsorship, non-renewal and termination appeals)
- Supervise the sponsorship of two State Board sponsored charter schools
- Coordinate all state-sponsored technical assistance and professional development for charter schools developers, administrators and sponsors
- Provide current information and data to media, legislators, and other interested parties
- Work with Department Federal Program staff to ensure charter schools are included in all federal programs
- Assist in the writing and revision of relevant administrative rules

## Margaret Bates

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(b)(6) Home (503) 316-8821  
[lmkbates@comcast.net](mailto:lmkbates@comcast.net)

**Current Position:** Education Specialist; Oregon Department of Education  
**Responsibility:** Charter Schools, Physical Education, Regional Liaison—Multnomah & Clackamas Counties

### Highlights:

2002-08 **Charter School Grant Program Director:** Program grant project director,  
2000-08 **Physical Education State Director:** Development of Content Standards  
2001 **Honorary Life Member for Service,** Oregon Alliance for Health, Physical  
Education, Recreation and Dance  
1999-00 **Oregon Elementary Physical Educator of the Year**  
1998-00 **District Team Leader:** Elementary and Middle School Physical Education,  
Elementary Health, Salem-Keizer School District  
1999-00 **Executive Director:** Oregon Alliance for Health, Physical Education,  
Recreation and Dance (OAHPERD)  
1995-00 **Co-Teacher Leader and Site Council Co-Chair:** Schirle Elementary  
School

### Education Background:

1997 Standard Administration Certification, Portland State University  
1989 Master of Science in Movement Studies for the Disabled,  
Oregon State University  
1977 Bachelor of Science in Education, Western Oregon State College

### Teaching Experience:

1992-00 Grades 1-5 Physical Education Specialist; Salem-Keizer School District  
1995-96 Instructor; "Teaching Physical Education in the Elementary Grades";  
Western Oregon State College, summer terms  
1979-92 K-5 Physical Education (.9 FTE), 1-8 Physical Education (.1 FTE) & 4-5  
After School Sports; Crook County School District  
1989 Director, Special Motor Clinic; Oregon State University  
1988-89 Graduate Assistant Special Motor Clinic; Oregon State University  
1980-85 Leader of outdoor challenges for individuals with special needs; All Outdoors,  
Inc., Redmond, OR

## **Responsibilities and Achievements:**

2002-08	Manage the Federal Charter School Program Grant, provide technical assistance to charter school developers, operators and to parties appealing to the Oregon State Board of Education for sponsorship.
2001-08	Presented numerous physical education content standards workshops for K-12 physical educators throughout the state
2000-01	Organized and directed five content panel meetings for development of Oregon physical education content standards
1981-01	High School and College Volleyball Referee (many appearances at the High School State volleyball tournaments)
1999-00	Oregon Elementary Physical Educator of the Year
1998-99	First Steps Tutor: First Steps Training for Schirle Elementary
1997-98	Member: Salem-Keizer School District Educational Facilities Task Force
1994-95	President: Oregon Alliance for Health, Physical Education, Recreation and Dance, (OAHPERD)

## **Professional Presentations:**

2002-06	Presented numerous charter school workshops around the state with the foci of charter school development, operations, leadership
2001, 02	Oregon School Districts and Confederation of Oregon School Administrators, <u>Physical Education Content Standards</u>
2000	OAHPERD Conference and Oregon School Districts, <u>Physical Education Content Standards, Where are they?</u>
1998	Salem-Keizer Physical Education Staff; <u>District Physical Education Standards, Frameworks and Curriculum Guidelines</u>
1996	Schirle Elementary Staff; <u>Developing and Implementing Performance Tasks</u>
1992, 1990	Oregon Summer Workshop Tour for Elementary School Physical Education; <u>Common Curriculum Goals</u>
1990	OAHPERD State Conference; <u>Adapted Physical Education Assessment</u>
1989	Master of Science Defense; Oregon State University

## **Published Articles:**

1991-06	OAHPERD Journal
1991	Oregon Elementary School Principal's Association (OESPA) Journal

## **Professional Membership:**

1977-08	Oregon Alliance for Health, Physical Education, Recreation and Dance- OAHPERD
1983-08	American Alliance for Health, Physical Education, Recreation and Dance AAHPERD
1996-02	Association for Supervision and Curriculum Development-ASCD
1995-01	Confederation of Oregon School Administrators-COSA
1995-01	Northwest Women in Educational Administration-NWEA

# TERESA SCHNEIDERMAN

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Work Email [teresa.schneiderman@state.or.us](mailto:teresa.schneiderman@state.or.us)

## Professional Experience

June 2005 – Present

Oregon Department of Education  
Salem, Oregon

*Education Specialist*

Charter Schools:

Dissemination grant coordinator

Leadership and Start-up Workshop Coordinator

State Board of Education sponsored charter schools liaison

Organize the State Board of Education Appeals for sponsorship

Reading First

Assist in the State Wide Outreach K-3 Literacy

Superintendent's Summer Institute, Leadership for Literacy & Learning Planning Team

March 2002 – June 2005

Willamette Valley Hospice  
Salem, Oregon

*Bereavement Coordinator*

Grief support to families

Comprehensive adult bereavement services to community

August 1999 – June 2001

St. Patrick Church  
Independence, Oregon

*Director of Religious Education*

Manage national, international and diocesan guidelines for programs

Direct education for pre-school thru adult education

August 1996 – August 1998

Washington Elementary School  
Salem, Oregon

*Title I Math, Grade 4/5 Teacher*

August 1979 – June 1996

St. Joseph School  
Salem, Oregon

*Elementary Teacher, Grades 1-6*

## Education

August 1995 – May 1998

University of Dallas  
Irving, Texas

*Masters of Theological Studies*

September 1976 – June 1979

Western Oregon University  
Monmouth, Oregon

*Bachelors of Science*

*Elementary Education*

# Budget Narrative

## Budget Narrative

Attachment 1:

Title: Pages: Uploaded File: **2221-Mandatory\_Budget\_narrative.doc**

**U.S. Department of Education**  
 Budget Narrative Federal Fiscal Years 2008, 2009 & 2010  
**Oregon Department of Education**

<b>Budget Items</b>	<b>% of Effort FTE</b>	<b>Year 1 Request</b>	<b>% of Effort FTE</b>	<b>Year 2 Request</b>	<b>% of Effort FTE</b>	<b>Year 3 Request</b>	<b>Comments</b>
<b><u>PERSONNEL</u></b>							
Joni Gilles	.10	\$10,408	.25	\$27,320	.25	\$28,686	Director in the Office of Education Improvement and Innovation provides supervision, management support for the charter school program grant
Margaret Bates	.25	21,737	.25	22,824	.25	23,965	Project Director, Education Specialist II: Provides technical assistance to charter school developers regarding state statutes; standards and assessments; start-up and charter implementation issues and the grant process. Prepare the required reports and evaluations regarding the Public Charter School Grant Program. Ensures the grant project goals are met.
Teresa Schneiderman	.25	15,593	.6	39,295	.55	37,821	Education Specialist I: Provides technical assistance to local communities; charter school governing boards; administrators and others in charter schools. Provides technical assistance to charter school developers regarding state statutes; standards and assessments; start-up and charter implementation issues, such as special education and IDEA requirements; admission and enrollment issues; employment policies and procedures, developing accountability plans; board rules and responsibilities; facility issues; state regulations; federal regulations and the grant process. Assists in the preparation of

Budget Items	% of Effort FTE	Year 1 Request	% of Effort FTE	Year 2 Request	% of Effort FTE	Year 3 Request	Comments
							required reports and evaluations regarding charter schools.
Don Wildfang	.0	\$0	.5	35,994	.5	37,794	Education Specialist II, provides technical assistance to local communities; charter school governing boards; administrators and others in charter schools. Provides technical assistance to charter school developers regarding state statutes; standards and assessments; start-up and charter implementation issues; such as special education and IDEA requirements; admission and enrollment issues; employment policies and procedures; developing accountability plans; board rules and responsibilities; facility issues; state regulations; federal regulations and the grant process. Assist in the preparation of required reports and evaluations regarding charter schools.
Donna Newbeck	.5	17,672	.75	27,833	.75	29,225	Office Specialist II, Provides support and assistance to the Public Charter Schools Program team.
<b>SUB-TOTAL PERSONNEL</b>	1.10	167,660	2.35	176,043	2.3	184,845	
<b>FRINGE BENEFITS</b>							
<b>TRAVEL</b>							
In-State		3,000		4,928		5,342	Travel in-state to assist charter school developers, sponsors and operations on-site. All operating
		\$29,799		\$68,082		\$69,974	<b>Rate:</b> an average rate of 45% has been used.

Budget Items	% of Effort FTE	Year 1 Request	% of Effort FTE	Year 2 Request	% of Effort FTE	Year 3 Request	Comments
Out of State		7,000		10,000		12,000	charter schools will receive a site visit. Travel funds will also cover, in some cases, costs of various conferences relating to charter schools.
<b>SUBTOTAL TRAVEL</b>		10,000		14,928		17,342	Attend Project Directors Conference and other Out-of-State conferences such as the National Charter school Conference & NACSA to keep informed of charter issues.
<b><u>EQUIPMENT</u></b>		0		0		0	
<b><u>SUPPLIES</u></b>		13,000		16,502		22,338	Website maintenance, supplies for 2.5 FTE based on ODE experience for use of copiers, fax, printers, postage, telephone, internet access
<b><u>CONTRACTUAL</u></b>							
Various		10,000		25,000		32,000	Contract for evaluation services, mediation services, startup-conferences, contracted and technical assistance to charter schools
<b><u>OTHER</u></b>							
Distribution of Grant-in-Aid		2,850,000		6,175,000		6,650,000	Funds for start-up and continuing implementation grants already in place from previous Federal grant, as well as new and continuing dissemination grants
<b>SUBTOTAL DIRECT</b>		128,209		277,778		299,145	

Budget Items	% of Effort FTE	Year 1 Request	% of Effort FTE	Year 2 Request	% of Effort FTE	Year 3 Request	Comments
<b>COST</b>							
<b><u>INDIRECT COST</u></b>		21,791		47,222		50,855	Direct costs for which indirect will be charged are personnel, travel, supplies, and contracts under \$25,000. The base for which indirect is to be applied is \$150,000 at an approved rate of 17%, maximum indirect is \$25,500 for Year 1. The base for each year, 2 and 3, is estimated at \$325,000 with a maximum indirect cost of \$55,250 calculated at the current rate of 17%. This is contingent upon the agency's approved rate for those budget periods.
<b>GRAND TOTAL</b>		\$3,000,000		\$6,500,000		\$6,500,000	