

**U.S. Department of Education**  
**Washington, D.C. 20202-5335**



**APPLICATION FOR GRANTS**  
**UNDER THE**

**Charter School Program Non-SEA Planning, Program Design, and Implementation**

**CFDA # 84.282B**

**PR/Award # U282B110021**

**Grants.gov Tracking#: GRANT10950614**

OMB No. , Expiration Date:

Closing Date: Aug 24, 2011

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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		
* 1. Type of Submission: <input type="checkbox"/> Preapplication <input checked="" type="checkbox"/> Application <input type="checkbox"/> Changed/Corrected Application	* 2. Type of Application: <input checked="" type="checkbox"/> New <input type="checkbox"/> Continuation <input type="checkbox"/> Revision	* If Revision, select appropriate letter(s): <input type="text"/> * Other (Specify): <input type="text"/>
* 3. Date Received: <input type="text" value="08/23/2011"/>	4. Applicant Identifier: <input type="text"/>	
5a. Federal Entity Identifier: <input type="text"/>	5b. Federal Award Identifier: <input type="text"/>	
<b>State Use Only:</b>		
6. Date Received by State: <input type="text"/>	7. State Application Identifier: <input type="text"/>	
<b>8. APPLICANT INFORMATION:</b>		
* a. Legal Name: <input type="text" value="Birchtree Parents Guild, Inc."/>		
* b. Employer/Taxpayer Identification Number (EIN/TIN): <input type="text" value="270856057"/>	* c. Organizational DUNS: <input type="text" value="8376990030000"/>	
<b>d. Address:</b>		
* Street1: <input type="text" value="7107 E. Palmer Wasilla Hwy."/>	Street2: <input type="text"/>	
* City: <input type="text" value="Palmer"/>	County/Parish: <input type="text"/>	
* State: <input type="text" value="AK: Alaska"/>	Province: <input type="text"/>	
* Country: <input type="text" value="USA: UNITED STATES"/>	* Zip / Postal Code: <input type="text" value="99645-7763"/>	
<b>e. Organizational Unit:</b>		
Department Name: <input type="text"/>	Division Name: <input type="text"/>	
<b>f. Name and contact information of person to be contacted on matters involving this application:</b>		
Prefix: <input type="text"/>	* First Name: <input type="text" value="Susan"/>	
Middle Name: <input type="text"/>	* Last Name: <input type="text" value="McCauley"/>	
Suffix: <input type="text"/>	Title: <input type="text" value="Principal, Birchtree Charter School"/>	
Organizational Affiliation: <input type="text"/>		
* Telephone Number: <input type="text" value="907-745-1831"/>	Fax Number: <input type="text"/>	
* Email: <input type="text" value="susan.mccauley@matsuk12.us"/>		

**Application for Federal Assistance SF-424**

**\* 9. Type of Applicant 1: Select Applicant Type:**

M: Nonprofit with 501C3 IRS Status (Other than Institution of Higher Education)

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-072511-001

\* Title:

Office of Innovation and Improvement (OII): Charter Schools Program (CSP): Planning, Program Design, and Initial Implementation Grants CFDA Number 84.282B

**13. Competition Identification Number:**

84-282B2011-1

Title:

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

Areas Affected.pdf

Add Attachment

Delete Attachment

View Attachment

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

Birchtree Charter School Implementation Project

Attach supporting documents as specified in agency instructions.

Add Attachments

Delete Attachments

View Attachments

**Application for Federal Assistance SF-424**

**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="190,761.00"/>
* 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="190,761.00"/>

**\* 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 in attachment.)**

Yes  No

If "Yes", provide explanation and attach

**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:

The Matanuska Susitna Valley including Palmer, Wasilla, Big Lake, Houston, Willow, Talkeetna & Sutton Alaska will be affected by Birchtree Charter School's Implementation Project.

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

OMB Control Number: 1890-0018

Expiration Date: 02/28/2011

\* Name of Institution/Organization

Birchtree Parents Guild, Inc.

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	0.00	0.00				0.00
2. Fringe Benefits	0.00	0.00				0.00
3. Travel	38,195.00	33,645.00				71,840.00
4. Equipment	2,150.00	0.00				2,150.00
5. Supplies	0.00	0.00				0.00
6. Contractual	18,098.00	16,688.00				34,786.00
7. Construction	0.00	0.00				0.00
8. Other	132,318.00	81,258.00				213,576.00
9. Total Direct Costs (lines 1-8)	190,761.00	131,591.00				322,352.00
10. Indirect Costs*						
11. Training Stipends						
12. Total Costs (lines 9-11)	190,761.00	131,591.00				322,352.00

**\*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:  To:  (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)?

<p>* Name of Institution/Organization</p> <p>Birchtree Parents Guild, Inc.</p>	<p>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.</p>	
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**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						
2. Fringe Benefits						
3. Travel						
4. Equipment						
5. Supplies						
6. Contractual						
7. Construction						
8. Other						
9. Total Direct Costs (lines 1-8)						
10. Indirect Costs						
11. Training Stipends						
12. Total Costs (lines 9-11)						

**SECTION C - BUDGET NARRATIVE (see instructions)**

## ASSURANCES - NON-CONSTRUCTION PROGRAMS

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.

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.

<p>* SIGNATURE OF AUTHORIZED CERTIFYING OFFICIAL</p> <p>Susan McCauley</p>	<p>* TITLE</p> <p>Principal, Birchtree Charter School</p>
<p>* APPLICANT ORGANIZATION</p> <p>Birchtree Parents Guild, Inc.</p>	<p>* DATE SUBMITTED</p> <p>08/23/2011</p>

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

Approved by OMB  
0348-0046

<b>1. * Type of Federal Action:</b> <input type="checkbox"/> a. contract <input checked="" type="checkbox"/> b. grant <input type="checkbox"/> c. cooperative agreement <input type="checkbox"/> d. loan <input type="checkbox"/> e. loan guarantee <input type="checkbox"/> f. loan insurance	<b>2. * Status of Federal Action:</b> <input type="checkbox"/> a. bid/offer/application <input checked="" type="checkbox"/> b. initial award <input type="checkbox"/> c. post-award	<b>3. * Report Type:</b> <input checked="" type="checkbox"/> a. initial filing <input type="checkbox"/> b. material change
--	--	--

**4. Name and Address of Reporting Entity:**

Prime     SubAwardee

\* Name:

\* Street 1:     Street 2:

\* City:     State:     Zip:

Congressional District, if known:

**5. If Reporting Entity in No.4 is Subawardee, Enter Name and Address of Prime:**

<b>6. * Federal Department/Agency:</b> <input type="text" value="Office of Innovation and Improvement"/>	<b>7. * Federal Program Name/Description:</b> <input type="text" value="Charter Schools"/> CFDA Number, if applicable: <input type="text" value="84.282"/>
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<b>8. Federal Action Number, if known:</b> <input type="text"/>	<b>9. Award Amount, if known:</b> \$ <input type="text"/>
--	--

**10. a. Name and Address of Lobbying Registrant:**

Prefix  \* First Name  Middle Name

\* Last Name  Suffix

\* Street 1:     Street 2:

\* City:     State:     Zip:

**b. Individual Performing Services** (including address if different from No. 10a)

Prefix  \* First Name  Middle Name

\* Last Name  Suffix

\* Street 1:     Street 2:

\* City:     State:     Zip:

**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.

\* Signature:

\* Name: Prefix  \* First Name  Middle Name

\* Last Name  Suffix

Title:     Telephone No.:     Date:

**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 **1894-0005**. 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:** U.S. Department of Education, 400 Maryland Avenue, S.W., Washington, D.C. 20202-4537.

**Optional - You may attach 1 file to this page.**

GEPA.pdf

Add Attachment

Delete Attachment

View Attachment

Birchtree Charter School and Parents Guild  
GEPA Section 427 Compliance

Birchtree Charter School is committed to ensuring equitable access to all of its educational programming and services for all families, students and employees regardless of their gender, race and national origin, color, disability or age.

Birchtree will ensure that families from economically disadvantaged communities have access to information about the educational program at Birchtree and job opportunities at Birchtree through the following tactics:

- Distributing flyers at neighborhoods and civic venues such as Head Start, Girls and Boys Club and Lions Club local chapters.
- Speaking at community based organizations and civic venues.
- Maintaining a user friendly website and internet presence.

Birchtree will ensure equitable access by providing students with special physical needs with equipment, furniture and supplies to accommodate their needs.

## 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.

<b>* APPLICANT'S ORGANIZATION</b> Birchtree Parents Guild, Inc.	
<b>* PRINTED NAME AND TITLE OF AUTHORIZED REPRESENTATIVE</b>	
Prefix: <input type="text"/>	* First Name: <input type="text" value="Susan"/> Middle Name: <input type="text"/>
* Last Name: <input type="text" value="McCauley"/>	Suffix: <input type="text"/>
* Title: <input type="text" value="Principal, Birchtree Charter School"/>	
* SIGNATURE: <input type="text" value="Susan McCauley"/>	* DATE: <input type="text" value="08/23/2011"/>

Close Form

SUPPLEMENTAL INFORMATION  
REQUIRED FOR  
DEPARTMENT OF EDUCATION GRANTS

**1. Project Director:**

Prefix:  \* First Name:  Middle Name:  \* Last Name:  Suffix:

Address:

\* Street1:   
 Street2:   
 \* City:   
 County:   
 \* State:   
 \* Zip Code:   
 \* Country:

\* Phone Number (give area code) Fax Number (give area code)

Email Address:

**2. Applicant Experience:**

Novice Applicant  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:**

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## Abstract

The abstract narrative must not exceed one page and should use language that will be understood by a range of audiences. For all projects, include the project title (if applicable), goals, expected outcomes and contributions for research, policy, practice, etc. Include population to be served, as appropriate. For research applications, also include the following:

- Theoretical and conceptual background of the study (i.e., prior research that this investigation builds upon and that provides a compelling rationale for this study)
- Research issues, hypotheses and questions being addressed
- Study design including a brief description of the sample including sample size, methods, principals dependent, independent, and control variables, and the approach to data analysis.

[Note: For a non-electronic submission, include the name and address of your organization and the name, phone number and e-mail address of the contact person for this project.]

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\* Attachment:

## **Birchtree Parent Guild and Birchtree Charter School**

7107 East Palmer Wasilla Highway, Palmer, Alaska 99645

**Project Director:** Susan McCauley \* 907-735-1831 \* [susan.mccauley@matsuk12.us](mailto:susan.mccauley@matsuk12.us)

Project Title: Birchtree Charter School Implementation Project

Birchtree's mission is to nurture and promote the development of healthy, responsible and creative human beings. Specially trained teachers use developmentally attuned approaches and the arts to encourage academic achievement, creativity, social intelligence and ecological awareness. The curriculum and grounding philosophy of the school is the internationally recognized Waldorf model. The focus of this innovative, standards based approach to education is on educating the whole child- intellectually, physically, and emotionally. Waldorf curriculum was developed out of the philosophy that in order to develop critical thinking, a child needs an active imagination. In providing a holistic learning environment based on developmentally appropriate instruction, all students can achieve and work to their maximum potential.

Project Objectives:

1. Maintain a culture of excellence and high expectations for all students.
2. Assure quality, Waldorf trained teachers in every classroom.
3. Promote parent involvement in and satisfaction with Birchtree Charter School.

Expected Outcomes:

1. All of Birchtree students will be proficient or advanced proficient on Alaska Standard Based Assessments and find their schooling experiences meaningful.
2. All of Birchtree's teachers will receive a Waldorf Certification.
3. Birchtree's parents will be actively involved in the school, performing 36 hours of volunteer service each year, attend school related functions, and feel satisfied with their experiences with Birchtree.

Birchtree's Project establishes a high quality charter school in which students will realize their fullest potential.

## Project Narrative File(s)

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Charter Schools Program  
Planning and Implementation Grant  
Application  
Program Narrative  
for

**Birchtree Charter School**

Submitted to:

The United States Department of  
Education  
Office of Innovation and Improvement

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## COMPETITIVE PREFERENCES

### **Competitive Preference Priority 1: Improving Achievement and High School Graduation**

#### **Rates**

Recent research indicates that issues leading to dropping out of high school can occur as early as elementary school and that sixth graders who develop behavioral and academic problems often do not self-correct. Birchtree Charter School's (BCS) Charter and Academic Program address the factors that work to increase graduation rates for *all* students and help prevent dropout particularly for students who are at-risk, high need, or students with disabilities. These factors include: intervening early in the lives of students, increasing attendance rates, involving families and supporting parental engagement, establishing rigorous expectations, and addressing misbehavior problems (Balfanz, Herzog & Mac Iver, 2007).

BCS's academic program and curriculum allows *all* students to have meaningful learning opportunities that are accompanied by high expectations. Students are challenged to achieve to their highest potential through a curriculum that works to enhance both their areas of strengths and weaknesses within a supportive community. The whole child philosophy addresses the emotional, physical, and academic needs of the child and the looping structure allows teachers to truly assess students' development and learning over multiple years. The Professional Development Initiative in this proposal will ensure that BCS's teachers are fully qualified to have the largest impact on the lives of students and implement the Waldorf curriculum to their greatest potential.

According to a report published for the Bill & Melinda Gates Foundation, almost half of students who end up dropping out of school are disengaged and not inspired to work hard

(Bridgeland, Dilulio, Morison, 2006). BCS's active learning environment and service learning opportunities, in conjunction with the looping model and rigorous main lesson blocks, work to increase academic achievement by thoroughly engaging students in the process of learning. According to the National Dropout Prevention Center Network, both service learning and active learning are effective strategies for increasing student engagement (Smink, Reimer, and National Dropout, 2005). Additionally, when students are engaged in meaningful learning activities, attendance rates increase.

BCS's Compassionate Campus Program works to positively support students in the area of behavior and personal growth through a tightly knit structure of student buddies, peer mentoring, and parent involvement. This model initiative will work to address and eliminate the behavioral problems that often occur by sixth grade and lead to student dropout.

Finally, family involvement in a child's education has been shown to positively affect academic achievement for all students regardless of ages or socioeconomic, racial/ethnic backgrounds (Mapp, 2004). BCS's dedication to parent involvement is a cornerstone in preventing dropout and promoting academic excellence. Parents are involved in all aspects of the school, from governing to classroom assistance, as thoroughly outlined in Selection Criteria (iv).

### **Competitive Preference Priority 2: Promoting Diversity**

Promoting diversity is a key element of Waldorf education, bringing students a richer view of the world and a deeper connection to others. The foundation of BCS's educational approach is to provide an academically rigorous education that ensures students will become good local and global citizens. In educating the whole human being, students have experiences

with a variety of cultures, opinions, and perspectives. Thus, diversity is approached through both teaching methods and the curriculum.

Every classroom at BCS strives to create a culture where differences are recognized and valued. The Waldorf method of teaching through stories brings diversity to the forefront of the curriculum by introducing students to people from around the world. Specific attention focuses on the diversity represented in each classroom. The curriculum and discussions related to it provide all students with an opportunity to consider the range of human history through a multitude of perspectives.

In the social realm, BCS's students are challenged to confront difficult issues and interact with others who have different viewpoints with kindness, an open mind, and tolerance. Interacting with others is an integral part of problem solving and thinking critically. BCS's Waldorf inspired approach to education, in the first year of operation, has already appealed to students from diverse socio-economic and cultural backgrounds.

### **Competitive Preference Priority 3: Improving Productivity**

BCS's Professional Development Initiative improves productivity by increasing efficiency in the use of time, staff, and money. The Birchtree APC has identified teacher training as its top priority. While BCS has a veteran staff, with an average experience history in public education of ten years (ranging from 1 year to twenty-three years), all but one staff member are new to Waldorf education. The grant proposal describes a cohort of all BCS certified staff who will work together on the same schedule to complete a Waldorf teaching certificate. Doing so in this manner is efficient in the use of time, staff, and money.

Currently, there are no institutions of higher education in Alaska that provide Waldorf training or certifications. BCS received permission from both the local District school board and

the Alaska Department of Education to alter its calendar so that a total of eight professional development days can be arranged into three blocks during the school year. On these days, professors from Rudolph Steiner College in California travel to Alaska to provide instruction for course credit required in the certification program. This approach eliminates the need for staff travel, lodging, and per diem during the school year that would otherwise be required if this training were to occur outside of Alaska. Additionally, on-site professional development has been embedded into the school day so that staff learning becomes a part of daily teaching practice. This creates a professional learning community at BCS with all staff members engaged in immediate application of the new content and strategies they are learning.

During the summer, BCS's entire staff will travel to Sacramento to complete intensive three-week trainings. As a group, BCS's staff can share housing and car rentals thereby maximizing the resources needed to support this training.

### **APPLICATION REQUIREMENTS**

***(i) Describe the educational program to be implemented by the proposed charter school, including how the program will enable all students to meet challenging State student academic achievement standards, the grade levels or ages of students to be served, and the curriculum and instructional practices to be used;***

Please see the response in Section (i).

***(ii) Describe how the charter school will be managed;***

Please see the response in Section (ii).

***(iii) Describe the objectives of the charter school and the methods by which the charter school will determine its progress toward achieving those objectives;***

Please see the responses in Sections (i) and (iv).

***(iv) Describe the administrative relationship between the charter school and the authorized public chartering agency;***

Please see the response in Section (ii).

***(v) Describe how parents and other members of the community will be involved in the planning, program design, and implementation of the charter school;***

Please see the response in Sections (iii) and (vi).

***(vi) Describe how the authorized public chartering agency will provide for continued operation of the charter school once the Federal grant has expired, if that agency determines that the charter school has met its objectives;***

Please see the response in Section (ii).

***(vii) If the charter school desires the Secretary to consider waivers under the authority of the CSP, include a request and justification for waivers of any Federal statutory or regulatory provisions that the applicant believes are necessary for the successful operation of the charter school and a description of any State or local rules, generally applicable to public schools, that will be waived for, or otherwise not apply to, the school;***

Please see the response in Sections (ii) and (v).

***(viii) Describe how the grant funds will be used, including how these funds will be used in conjunction with other Federal programs administered by the Secretary;***

Please see the response in Section (ii).

***(ix) Describe how students in the community will be informed about the charter school and be given an equal opportunity to attend the charter school;***

Please see the response in Section (iii).

*(x) Describe how a charter school that is considered an LEA under State law, or an LEA in which a charter school is located, will comply with sections 613(a) (5) and 613(e) (1) (B) of the Individuals with Disabilities Education Act; and*

Please see the response in Section (ix).

*(xi) If the eligible applicant desires to use grant funds for dissemination activities under section 5202(c) (2) (C) of the ESEA, describe those activities and how those activities will involve charter schools and other public schools, LEAs, developers, and potential developers.*

Not applicable to this Application.

## **SELECTION CRITERIA**

### **(i) Quality of proposed curriculum and instructional practices**

#### ***Mission***

Birchtree Charter School (BCS) opened in August of 2010, as a K-8 school with a first-year enrollment of 219 students. BCS's mission is to nurture and promote the development of healthy, responsible, and creative human beings. We believe families in our local community will benefit from their involvement with BCS. Specially trained teachers use developmentally attuned approaches and the arts to encourage academic achievement, creativity, social intelligence, and ecological awareness. The curriculum and grounding philosophy of the school is the internationally recognized Waldorf model. Waldorf education, which has traditionally been offered in private school settings, has become one of the fastest growing public school movements in the United States. As of 2011, there are forty-four publically funded schools that use methods inspired by Waldorf education.

The focus of this innovative, standards based approach to education is on educating the whole child- intellectually, physically, and emotionally. Waldorf curriculum was developed out

of the philosophy that in order to develop critical thinking, a child needs an active imagination. In providing a holistic learning environment based on developmentally appropriate instruction, all students can achieve and work to their maximum potential.

***Community Information and Student Demographics***

BCS is located in the Matanuska-Susitna Borough School District (MSBSD), the fastest growing district in Alaska. Like other districts in Alaska, the MSBSD has struggled with student achievement, had a graduation rate of 69.69% in 2011 and has reached Title I Improvement Level 4 for the last two years.

Twenty-three percent (23%) of BCS’s student population during the 2010 school year was home-schooled the year prior. These parents have voiced their enthusiasm for the fact that the MSBSD now offers an alternative choice that focuses on whole child education. Demographic Information for the MSBSD and BCS for the 2010-2011 School Year can be found in Figure 1.

**Figure 1:**

	<b>Mat Su School District</b>	<b>BCS</b>
African American	<2%	<1%
Alaska Native and American Indian	11%	14%
Asian	2%	3%
Caucasian	80%	77%
Hispanic	<2%	0%
Multi-Ethnic	2%	5%
Students with Disabilities	14%	12.5%

### ***Grades Served***

During the first year of operation, BCS offered kindergarten through seventh grade. For the 2011 school year, BCS will add eighth grade, growing to serve approximately 275 students. Figure 2 outlines the students per grade for the 2010-2011 school year.

**Figure 2:**

<b>Grade</b>	<b>Number of students</b>
Kindergarten: 2 classes	31
1 <sup>st</sup> grade: 2 classes	38
2 <sup>nd</sup> grade: 2 classes	40
3 <sup>rd</sup> grade: 1 class	34
4 <sup>th</sup> grade: 1 class	24
5 <sup>th</sup> grade: 1 class	24
6 <sup>th</sup> grade: 1 class	24
7 <sup>th</sup> grade: 1 class	14
Total Enrollment	219

BCS's growth plan is to add two kindergarten classes per year, eventually resulting in two classes per grade from K-8<sup>th</sup> with an anticipated maximum school enrollment of 375.

### ***Program Philosophy***

At the heart of the Waldorf Curriculum is the recognition of how much children change from year to year. Teacher instruction and curricula place equal importance on the mental, emotional, and physical nature of each grade level. The curriculum ensures that the material presented – and how it is presented – is developmentally attuned to the appropriate age at every grade level.

This model values the stages of childhood development, greater interaction between child and teacher, and the integration of the arts into a rigorous academic program.

Waldorf education is based on the whole child. The rich curriculum provides a well-rounded education using academics, art, music, foreign language, and movement that responds and enhances the child's developmental phases. It encourages children to have an imaginative inner life. Children who attend Waldorf programs are typically able to connect to nature, have a life-long passion for learning, and have a high emotional and social intelligence. According to a recent study of Waldorf graduates listed on the web site "Why Waldorf Works" ([www.whywaldorfworks.org](http://www.whywaldorfworks.org)), 94% attended college, 47% chose humanities or arts as majors, 42% chose science as a major, 89% are highly satisfied in their occupation choice, 91% are still active in lifelong education, 90% highly value tolerance and other viewpoints. As we move forward into a world of unknowns, we will need critical thinkers who can imagine solutions to our everyday social problems.

### ***Educational Program and Methods***

Waldorf methods are child-centric and attune what is taught, when it is taught, and how it is taught, to the cognitive, psychosocial, and kinesthetic phases of child development. BCS's educational program, which is inspired by Waldorf education, utilizes methods that are research based and result in a rigorous academic program that is developmentally appropriate and socially responsible.

### ***Multi-year Looping***

One of the primary components of BCS's program is multi-year teacher looping model as a method for building solid relationships between families, students, and teachers while positively impacting student achievement. BCS's teachers loop, together with their students, from 1<sup>st</sup>

through 5<sup>th</sup> and 6<sup>th</sup> through 8<sup>th</sup> grade. This long-term relationship provides enriched opportunities to assess students over a long period of time, allowing the teacher to better meet the individual needs of the child and to facilitate powerful learning experiences using a variety of appropriate strategies. The class teacher, while not the only teacher with whom the group has contact, is the teacher who acts as class guardian and holds responsibility for each student's academic progress. The resulting connection between student and teacher acts as a guarantor for individual's social well-being while placing relationship as a means of learning.

The educational process of looping provides a stable educational environment that supports students' developmental changes and responds to individual needs. Research supports the model of looping and outlines three broad areas of impact: time, relationships, and student support and engagement. Instruction time is gained each year as teachers have knowledge of students' abilities allowing them to begin instruction immediately. Teachers can also prepare more effectively for the upcoming year based on knowledge of the students. Research indicates that at least a month of instructional time can be gained through this educational structure. In addition, better rapport with parents results in increased parent participation and involvement, which positively impacts academic achievement (Montalvo, Mansfield, and Miller, 2007). The relationships and strong sense of belonging that emerge with looping results in better academic performance, particularly for special education students and second language learners. In addition to increased academic achievement, looping has been shown to result in increased attendance and reduction in inappropriate student behaviors (Hedge and Cassidy, 2004).

### ***Main Lesson Block***

BCS's school day is attuned to pupils' inherent biorhythms and offers intense, focused learning opportunities at the beginning of each day with a fully integrated two-hour period of

instruction. This practice allows teachers to cover the curriculum intensively and economically, and it provides the students with the fullest possible immersion in a subject. Subjects are taught for three to four weeks and then revisited later in the year or in subsequent years. Teachers use the main lesson format to address a progressive range of competencies in mathematics, language arts, science, and humanities. Main lesson gives students the chance to delve deeply into key concepts, stories or terminologies as the teacher uses a variety of strategies to facilitate understanding. Main lessons are designed to focus on specific subject content, while also serving as a vehicle for addressing multiple learning modalities, multiple intelligences, and interdisciplinary curricula.

Research indicates that providing more instructional and academic learning time positively impacts student achievement. According to the 2007 Educator Sector Reports findings, longer blocks of academic learning time increase student learning particularly for low-performing students. Additionally, wasted time associated with start-up routines and transitions between classes is gained when creating extended, focused learning blocks. In San Diego, an evaluation of the Blueprint for Success program found that literacy blocks narrowed achievement deficits by 15% over two years (Silva, 2007).

### ***Integration of Art and Music***

Drama, painting, music, drawing, modeling, etc., are integrated into the entire BCS K-8 curriculum, including mathematics and the sciences. The arts are also offered as special subjects. The use of music, dance, imaginative play, movement, and the visual arts throughout the curriculum has been proven and directly tied to student achievement in areas of math, reading writing, verbal skills, critical thinking, cognitive development, and increased performance on standardized tests. Research shows that active learning allows for a greater variety of unique

mental, emotional, and physical states, which are essential to learning (Sporns, Tononi, and Edelman, 2000). Active learning mobilizes additional neurons in far different, more lasting and more complex ways than exclusively semantic learning (Jensen, 2008).

### ***Curriculum***

BCS provides a comprehensive curriculum, emphasizing math, social sciences, the arts, literacy, and foreign language. BCS's curriculum is fully aligned with Alaska's Grade Level Expectations and will result in students who meet or exceed Alaska State Standards.

**Reading and writing:** Reading is taught through the process of writing. Letters are learned in the same way they originated in the course of human history. Human beings first perceived, then pictured, and out of the pictures abstracted signs and symbols. Early elementary students hear stories, draw pictures, and discover the letter in the gesture of the picture. In this way, writing is taught first, followed by formal reading instruction. Early reading skills are integrated in songs, poems, and games, establishing a joyful and living experience of language. Through the grades, texts taken from a rich humanities curriculum provide material for reading practice. Focused instruction in phonemics awareness, phonics, and fluency takes place during a daily skills period.

**Mathematics:** In grade school, math instruction begins by teaching from the whole to the part (for example, answering the question of what is 12,  $12=3+9$ , or  $12=4\times3$ ). This encourages flexible thinking and discourages the one "right" answer way of thinking. Movement, stories, manipulatives, and games are used to learn counting and the four processes (addition, subtraction, multiplication, division). Mental math problem solving is emphasized to develop and strengthen thinking. Main lesson blocks focus on conceptual understanding and application of

mathematic concepts. To ensure the mastery of discreet computational skills, Saxon Math is used in a daily skills period beginning in 3<sup>rd</sup> grade.

**Humanities:** The philosophies, religions, and cultures of the past have shaped humanity, and continue to influence today's values and morals. Students learn about these from an historical perspective. Care is taken not to influence them toward any single belief system. Care is taken to include all cultures that are represented in the student population. By living into these cultures through legends, biography, and literature, the children gain an appreciation for the diversity of humankind. By the eighth grade the students have journeyed from Ancient Cultures, through Greece and Rome, to medieval history, the Renaissance, the Reformation, the Age of Exploration, and up to the present day.

**Sciences:** Science is taught experientially. Through experimentation, children observe carefully, ponder, discuss, and then discover the conclusion, the law, formula, etc. Through this process, rigorous critical and analytic thinking and sound judgment are trained.

**Practical Work:** Crafts, handwork, and practical work such as knitting, woodworking, fabric arts, bookbinding, house building, and gardening are an integral part of the required curriculum from kindergarten through the grades. Decades before brain research confirmed the value of this kind of activity, studies recognized a relationship between body movement and brain function. Learning to knit and crochet in the early grades develops fine motor skills, and leads to lively thinking and enhanced intellectual development in later years. Coordination, patience, perseverance, and imagination are also schooled through practical work.

**Foreign Language:** Foreign Language is taught beginning in first grade, giving students language skills and insight into other cultures.

### ***Program Goal and Objectives***

BCS and the BPG were born out of a commitment to educate children using Waldorf methods and to develop a socially responsible community through tolerance, creativity, and holistic thinking. To meet this goal, BCS must address three important objectives. Each one is described in more detail below.

**Objective 1: Maintain a culture of excellence and high expectations for all *students*.**

BCS's mission to nurture and promote the development of healthy, responsible, and creative human beings can only be accomplished by maintaining high expectations for all students. BCS values the unique contribution each child makes to the learning community and is committed to assisting students in developing to their greatest potential. In order to do so, policies and systems must be established around student attendance, behavior expectations, and academic achievement measures.

***Attendance*** - Attendance is the starting point for establishing high expectations for students. Students must be in school, on time in order to fully take advantage of the unique learning opportunities presented at BCS. During the 2011, school year BCS will develop and implement procedures to respond to student absenteeism. For the 2010 school year, BCS's attendance rate was between 88-89%. The attendance rate is represented in a range because attendance software was not in place at the start of the 2010 school year due to technological infrastructure difficulties which took some time to remedy. Anecdotally, teachers communicated concern regarding student absences and tardiness. For many BCS families, the process of being educated in a formal environment is a new experience. Thus, BCS's attendance policy will be developed, communicated to parents, and contain detailed steps in dealing with absenteeism and tardiness. During year one of the grant, BCS's attendance will meet or exceed 90% and during year two attendance will meet or exceed 92%.

**Compassionate Campus Project** - The Whole Child approach to educating children places emphasis on developing students’ physical, emotional, and intellectual abilities. BCS will develop and implement a Compassionate Campus Project with clearly identified and communicated expectations for student behavior, and a school-wide system for teaching and reinforcing those behaviors. In addition to supporting all students’ emotional and social development, the Compassionate Campus Project is of particular importance to the BCS community because of current student demographics.

Over twenty-three percent of BCS’s students come from homeschooling backgrounds and have not been part of a organized learning environment. Additionally, many of BCS’s special education students experience behavioral challenges, which can directly impact academic improvement. The Compassionate Campus Project aims at developing students’ sense of social responsibility, respect, compassion, and cooperative capabilities. As stated in the mission statement contained in BCS’s charter a primary focus is “to nurture and promote the development of healthy, responsible and creative human beings.”

**Academic Achievement** - All students attending BCS will participate in Alaska’s statewide standards-based assessment system annually. The results of Alaska Standards Based Assessment for the 2010-2011 School Year are as follows and are presented with the recognition that the scores represent cumulative knowledge and provide baseline data.

**Figure 3:**

	<b>Reading: Advanced/proficient</b>	<b>Writing: Advanced/proficient</b>	<b>Math: Advanced/proficient</b>
Grade 3	79.1%	83.4%	79.2%
Grade 4	100%	95.6%	91.7%

Grade 5	82.6%	82.6%	60.9%
Grade 6	100%	91.6%	66.6%
Grade 7	85.7%	78.6%	85.7%

Eighty percent (80%) students enrolled in BCS for two or more consecutive years will score proficient or advanced in each content area on the SBA’s during year one of the grant and eighty-five percent (85%) on each content area during year two of the grant. In addition, teachers will assess students’ progress and growth using a variety of formative assessment mechanisms aligned with the curriculum and Alaska Grade Level Expectations (GLEs). All teachers will administer quarterly Waldorf assessments aligned to Alaska GLEs.

**Objective 2: Assure quality, Waldorf-trained teachers in every classroom**

While BCS's teaching staff possesses an average of 10 years’ experience in public school education (ranging from 1 year to 23 years of experience), all but one of BCS's 16 certified teachers are new to Waldorf education. BCS’s teachers are vested in the community and contribute to the student population of BCS by enrolling eight of their own children in the school. An additional nine children of staff members who are not yet of school age will be attending in the future.

Professional development is needed to enable BCS’s teachers to deliver Waldorf curriculum and methods to their greatest ability. BCS's governing board, the APC, has identified teacher training as its number one priority. In order to assure quality Waldorf trained teachers, BCS will implement a three-pronged approach to teacher training with the end result being that 100% of BCS teaching staff will receive Waldorf teacher certification by the year 2014.

***Waldorf Teacher Certification Program*** - This training program is designed to provide all certified BCS teaching staff with knowledge of the philosophical foundation and pedagogical techniques required to effectively implement Waldorf methods within the public sector. As a charter school within the MSBSD, our staff has committed to instruction using the varied methods outlined earlier in this proposal. After completing this training program, our Waldorf-certified teachers will be more capable of maximizing the Waldorf curriculum model to help each student achieve his or her potential socially, emotionally and academically.

There are four components to this certification program.

1. Classes in residence at Rudolph Steiner College: Six weeks of intensive instruction will occur during two consecutive summers.
2. On-site practicum: Six three-day practicums will occur on-site at BCS.
3. On-site field experience: A total of seven on-site coaching sessions will occur with each BCS teacher.
4. Class-cluster webinars: Teachers will participate in a total of 10 class-cluster webinars.

***Teacher Evaluation Using Main Lesson Observation Protocol*** - All of BCS's teaching staff will be observed quarterly during years one and two of the grant using the Main Lesson Observation Protocol. This observation instrument was developed during the summer of 2011 by BCS's administrator in conjunction with administrators from two other Waldorf charter schools.

***Model Classroom Observations*** - BCS employs a Master Waldorf teacher as part of the teaching staff. Her classroom will be utilized as a model classroom enabling teachers to observe Waldorf lessons and methods being delivered. All of BCS's certified teaching staff will observe in the Model Classroom for a full main lesson period once a quarter for years one and two of the grant and will have dedicated time in their schedules to conference with this teacher regarding

questions, methods, or challenges they are experiencing in their classrooms. A stipend is outlined in the budget for this teacher assuming a mentor role and participating in post observation debriefings with the teachers.

**Objective 3: Promote parent involvement in and satisfaction with BCS.**

BCS has its origins as a parent-initiated project. Parents and their commitment to educating their children using Waldorf methods led to the formation of BPG in 2009 and BCS in 2010.

During these initial implementation years, BCS and the BPG must work cooperatively to develop systems for including all parents in the school and in educating new parents in the Birchtree Community who may be less familiar with the tenets Waldorf education. Educating children using Waldorf methods requires a commitment of parents, students, and staff.

During the 2010 school year, the BPG and BCS collaborated with the Foraker Foundation, a non-profit dedicated to supporting Alaska's non-profits, to clearly define the duties and responsibilities. BCS in conjunction with the BPG are committed to developing parent communication systems, and increasing opportunities for parents to learn more about the Waldorf model, and participate in a wide range of volunteer opportunities. Each parent is expected to complete a minimum of 36 volunteer hours each year. These opportunities for parent involvement in the past year have included such things as building classroom tables and cubbies, creating school murals and wall art, building outdoor and indoor playscapes, creating the Fall and Spring Festival celebrations, and holding annual fundraising events.

BCS will begin this process by establishing concrete systems of parent contact and record keeping. The BPG will create an electronic system to track family volunteer hours. It will develop a system to categorize volunteer skills and individual availabilities so that targeted volunteer requests can be made by phone or email. The BPG will also set up a thank you system

to express appreciation for the many volunteer hours contributed. A four-course volunteer management training program taught by the Foraker Foundation will be attended by the BPG. This training will assist the BPG in managing our parent's volunteer activities to maximize their satisfaction and involvement with our school. Systems of communicating with parents and developing a variety of parent volunteer opportunities are a priority.

Communication systems will include weekly school bulletins and monthly school newsletters, flyers posted in the office or sent home with children through their classroom teacher, emails to parents, phone calls home, and scheduled committee meetings as needed for specific events. These communications may originate from the BPG or from the school Administration as they work very closely together.

Opportunities to learn more about the Waldorf curriculum will take place in the form of informational seminars for parents and quarterly student assemblies demonstrating learning that is taking place. Parent satisfaction surveys will be developed and distributed during both years of the grant to gauge parent satisfaction with BCS. BPG will hold an annual retreat for BPG board members, which will include training with the Foraker Group to build an effective, empowered and empowering volunteer community.

**(ii) The degree of flexibility afforded by the SEA and the LEA to BCS**

BCS was authorized by the State Board of Education and Early Development after unanimous approval by the MSBSD School Board. BCS is responsible to the MSBSD School Board for providing documentation as to its academic, financial, and general accountability.

***How BCS is managed:***

**Academic Policy Committee (APC):** As outlined in State Statute, the APC develops and ensures implementation of policies that govern the school program, and is comprised of parents,

teacher representatives, and BCS's principal. APC members represent a range of skills and experience in public and Waldorf education, business management, and fundraising. The APC approves the hire of all school staff, determines the curriculum and instructional materials, and monitors the use of school funds. The APC serves as the evaluator of the school principal while delegating to the principal responsibility for the day-to-day operation of the school.

**Birchtree Parent Guild (BPG):** The BPG is a 501(c)3 and functions in accordance with practices for a non-profit organization. The BPG organizes school-wide festivals, fund-raising events, parent education opportunities, the summer camp, classroom volunteers, and Waldorf-inspired community activities. All BCS parents are welcomed to participate as BPG members by attending the monthly meetings or participating as committee members.

**Degree of Flexibility:** Alaska State Statute and MSBSD Policy grant BCS flexibility and autonomy in matters related to management and operations. The Alaska state laws that govern the creation and operation of charter schools are defined in sections AS14.03.250, AS14.03.255, AS14.03.260, and AS14.03.290. Public charter schools in Alaska enjoy freedom of operation that is regulated and managed as defined in a contract between the charter school and the local education agency. Alaska charter school laws protect freedom of operation and ensure flexibility for operation in the following manner.

According to State Statute AS14.03.255, a charter school is exempt from the school district's textbook, program, curriculum and scheduling requirements. BCS, in developing its charter, had the freedom to outline the methods and curricular program for the school as well as the materials that will be used to support its program. BCS's school calendar is developed by BCS's principal and approved by the APC, allowing for optimal use of professional development days.

In accordance with Alaska State Statute and MSBSD policy, BCS determines the pupil-to-teacher ratio for the school. All staffing decisions are made by BCS's principal in consultation with BCS's APC. Supervision of employees is the responsibility of BCS's principal. MSBSD cannot involuntarily transfer teachers to BCS. Additionally, district-mandated staffing requirements do not impact staffing decisions at BCS, thus allowing for greatest utilization of the budget and parent volunteers. For example, BCS is not mandated to allocate specific funds for janitorial staff and can use volunteers to help with daily maintenance issues freeing up funds to be used to hire qualified, certified staff.

**Funding:** Alaska State Statute and MSBSD Board Policy specify that charter school budgets, "shall not be less than the amount generated by the students enrolled in the charter school less administrative costs retained by the district, determined by applying the indirect cost rate approved by the Department of Education and Early Development" (Alaska Statute 14.03.260). BCS has complete autonomy over the manner in which funds are utilized in the school's budget and expenditures and determines the manner in which State and local funds are utilized, allowing for maximization of funds to support student achievement.

The long-term financial stability of public charter schools is dependent on prudent management and efficient operations. BCS's practice in building the school's budget is fiscally conservative. Per-pupil revenue projections are based on 85% enrollment, although we anticipate the school to be fully enrolled for the 2011-2012 school year and have a waiting list of 120 students.

***Grant Funds:***

If BCS's implementation grant proposal is funded, the monies will be used to directly support the objectives outlined in this proposal.

***Objective 1: Maintain a culture of excellence and high expectations for all students.***

Funds will be used to solidify and establish attendance procedures, develop and implement the Compassionate Campus Program and refine Waldorf assessment mechanisms to align with Alaska Grade Level Expectations. The following steps will be undertaken as elements of this project:

***Objective 2: Assure quality, Waldorf trained teachers in every classroom.***

Funds will be used to allow 100% of BCS teachers to gain Waldorf certification and to participate in Model classroom observations and Main Lesson Protocol observations.

***Objective 3: Promote parent involvement in and satisfaction with BCS.***

Funds will be used to establish parent volunteer management systems and training for managing volunteers.

***Accountability:***

Annually, BCS submits a written report and makes a presentation to the School Board and the public. This report includes information on the attainment of performance expectations, meetings of governing bodies of the charter school, descriptions of charter school activities, and other information of interest to the local School Board. BCS is also financially accountable by providing a detailed budget annually and through compliance with the uniform system of financial record keeping and spending procedures of the MSBSD. The freedoms of management and full control over budget and finances enables BCS to best serve students through the setting of goals, hiring of staff, and implementation of a program designed to meet the needs of our students.

### **(iii) The extent of community support for the application**

#### ***Community outreach***

Residents within the MSBSD were and continue to be informed about BCS through the following: a web page, [www.Birchtreecharterschool.com](http://www.Birchtreecharterschool.com); community informational sessions about Waldorf education and the K-8 curriculum, ten (10) held prior to opening and offered prior to each annual intend-to-enroll period; flyers placed around the Mat-Su Valley with the web page and dates of informational sessions; three (3) local newspaper articles about BCS; Waldorf-inspired classes taught for grades 1-8 at a local home-based Charter School; Waldorf-inspired Summer Arts Camp sessions led by a Certified Waldorf-trained teacher; link to BCS website on the official MSBSD website; APC and BPG meetings that adhere to the Open Meetings Act; annual Open House and informational session at BCS; annual BPG-sponsored social events (3-4 annually) open to all community members; and word of mouth.

#### ***Equal Opportunity Admissions Criteria***

To ensure equal opportunity to attend BCS, enrollment policies, access to curriculum, services and activities of the program are **nondiscriminatory with regard to religion, language, physical handicap, or national origin of children and their parents**. The BCS application procedure and timelines for admission will be the same as that of other alternative programs in MSBSD. Admissions will be on a first-come, first-served basis. If the number of students applying for admission exceeds the openings available, entrance shall be determined by lottery process. See Appendix A for a detailed description of BCS's admissions criteria, the lottery process, and post-admissions procedures.

## ***Community Support***

On-going community support has been and will continue to be critical in the success of BCS. One measure of this support has been, from the very beginning, the significant interest in BCS as a viable K-8 education alternative for families in the MSBSD. The waitlist of over 45 students for the duration of BCS's first year in operation, as well as a full enrollment and a waitlist of almost 120 students so far this school year, indicates substantial community interest in the program at BCS.

BCS enjoys substantial support from the greater community. Two fundraisers (Playscape Auction and Afternoon with the Arts) and two festivals (Fall Festival and May Faire) in the first year of operation were well attended by the greater community, with over \$17,000 in profits for the school. In addition, the letters of community support, shown in Appendix B, from current MSBSD superintendent Dr. Deena Paramo, Alaska State House Representative Carl Gatto, current MSBSD school board member Eric Cordero, and the Alaska Policy Forum show the breadth and depth of community support for BCS.

### **(iv) The quality of the strategy for assessing achievement of BCS's objectives**

A comprehensive evaluation study will track outputs, outcomes, and impacts of BCS's Implementation Project on students, parents, and teachers. The evaluation will track formative/ process and summative outcomes related to each of the project objectives. An external evaluator who will collaborate with and advise BCS and BPG will conduct this evaluation.

We expect the evaluation of the BCS's Implementation Project to be based on the Program Evaluation Standards adopted by the American Evaluation Association. Namely, this evaluation is designed to be responsive to the needs of stakeholders, their communities, and their interests. The methodology and data collection are designed to make the best use of available resources.

The evaluator is expected to work with multiple partners to gather data and to maintain data according to high standards of data integrity and security. We expect this evaluation to result in a high-quality, valid and reliable report of use to the Birchtree Community for refining the educational programs and parent education and involvement initiatives.

**Process Evaluation**

**Objective 1: Maintain a culture of excellence and high expectations for all students**

<b>Questions</b>	<b>Evidence/ Performance Measure</b>	<b>Data Collection</b>	<b>Instrument/Data</b>	<b>Analysis</b>
Are student attendance rates increasing?	Daily attendance rates will exceed 90% during Year One and 92% during Year Two of the grant	Daily attendance rates	Daily attendance by teachers.  Monthly computerized attendance reports by office.	Attendance frequency counts converted to % increase.
What are the emotional/ social areas of need for BCS's student population?  To what extent do students' behavior referrals decline from the baseline collected	Student referrals for behavioral support will decrease 20% during Year Two of the grant	Student government actions, student & parent responses to meeting	Compassionate Campus meeting evaluations.  Meeting minutes.  Buddy referral form.	Frequency counts will be calculated.  Year One referral data to be compared with Year Two data  Content analysis of

**Process Evaluation**

**Objective 1: Maintain a culture of excellence and high expectations for all students**

Year One of the grant?		survey.  Individual referrals for  Buddy support		student government actions and student and parent responses.
To what extent are students learning Waldorf curriculum?	80% of students who have been enrolled in the school for two or more consecutive year will score proficient or advances proficient in each area of the SBA’s during year one of the grant.  85% of students have been enrolled in the school for two or more consecutive year will score proficient or advances proficient in each area of the SBA’s during year two of the grant.	Quarterly student achievement results.  Individual Student SBA results – reading, writing, and math.	SBA reports, disaggregated.  Gradalis Waldorf Assessments.	Content analysis of Gradalis assessments disaggregated by grade and teacher.  Content analysis of SBA results by disaggregated group, by grade, and by teacher.

**Process Evaluation**

**Objective 1: Maintain a culture of excellence and high expectations for all students**

To what degree do students report their school experiences are meaningful?	90% of BCS students will score HIGH on the Internal Assets and Self-Assessment Survey during year One and Year Two of the grant	Individual student survey response.	Internal Assets and Self- Assessment Survey.	Content analysis of survey responses to identify themes.
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**Process Evaluation**

**Objective 2: Assure quality Waldorf trained teachers in every classroom**

Questions	Evidence	Data Collection	Instrument/Data	Analysis
<p>Are teachers completing their required coursework toward completing a Waldorf Teaching Certificate?</p>	<p>100% of BCS teachers will be enrolled in a Waldorf certification program during Year One of the grant. 85% of BCS teachers will complete a Waldorf certification program by the summer of 2013.</p>	<p>Individual teacher attendance record. Individual teacher transcripts of course completion.</p>	<p>Attendance record. Transcripts.</p>	<p>Year One: % of teachers on track to complete Waldorf certificate by 2013.</p> <p>Year Two: % of teachers who complete Waldorf certificate by summer of 2013.</p>

**Process Evaluation**

**Objective 2: Assure quality Waldorf trained teachers in every classroom**

<p>To what extent are teachers translating their learning from the certification program into their own teaching practices? Are teaching practices changing based on professional development experiences?</p>	<p>100% of BCS teachers will be observed quarterly during Year One and Year Two of the grant using the Main Lesson Observation Protocol. 100% of teachers will set an improvement goal based on Main Lesson Protocol Observation criteria.</p>	<p>Record of teacher observations. Individual teacher improvement goals.</p>	<p>Main Lesson Protocol Observation.</p>	<p>Frequency count. Content analysis of improvement goals. % of teachers improving achievement goal.</p>
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<b>Process Evaluation</b>				
<b>Objective 2: Assure quality Waldorf trained teachers in every classroom</b>				
What are teachers' impressions and observations of the Model Classroom Observations? Are the teachers gaining new insights from the observations?	100% of BCS teachers will participate in 4 Model Classroom Observations during Year One and Year Two of the Grant.	Teacher Observation schedule. Model classroom teacher log.	Model classroom teacher log of post observation meetings.	Frequency count. Content analysis of meeting log to identify themes.

<b>Process Evaluation</b>				
<b>Objective 3: Promote parent involvement in and satisfaction with BCS</b>				
<b>Questions</b>	<b>Evidence/ Performance Measure</b>	<b>Data Collection</b>	<b>Instrument/Data</b>	<b>Analysis</b>
To what extent are BCS parents involved with the school?	90% of parents will fulfill 36 hours of volunteerism during	Individual parent	Volunteer record	Frequency counts converted to %.

	<p>year one and year two of the grant.</p> <p>85 % of parents will attend quarterly assemblies during year one and year two of the grant.</p>	<p>volunteer records.</p> <p>Parents' signatures on assembly sign-in log.</p>	<p>Assembly sign-in log.</p>	<p>Tally of attendance.</p>
<p>To what extent are parents satisfied with BCS?</p>	<p>Parent satisfaction scores will average 3 or higher during year one and year two of the grant</p>	<p>Individual surveys completed by all BCS parents.</p>	<p>Parent satisfaction survey.</p>	<p>Average satisfaction score to be 3 or higher.</p>

**(v) Existence of a charter or performance contract between BCS and its authorized public chartering agency**

BCS and the MSBSD entered into a contract in spring of 2010 for the formation of BCS. Outlined within BCS's Charter is the responsibility for making Adequate Yearly Progress in the same fashion as all other schools located in Alaska.

Assessment of student performance is one of the most powerful tools that a classroom teacher or school can use to enhance student achievement and school-wide performance. Together with standards and research-based instructional strategies, assessment will be an integral part of the pursuit of excellence at BCS.

Alaska's Standard Based Assessments (SBAs) and the Terra Nova Assessment in reading writing, mathematics, and other mandated subjects will be administered annually, in compliance with NCLB requirements. Results from the SBAs will be used along with other authentic assessments to monitor progress, inform revision to the educational program, and to set appropriate academic goals for individual students and the school as a whole.

BCS will utilize Waldorf Curriculum and Assessment Rubrics, the Gradalis assessments, to guide students and teachers in decision-making about what constitutes quality work. These rubrics will be aligned with Alaska Grade Level Expectations and used as quarterly assessments. In addition, BCS will develop a variety of authentic assessments that are part of the instruction and that challenge students to prove standards proficiency and achievement of the SBA's. These internal assessments, created over the first three years, will be rigorous, and relevant, allowing students to showcase their learning. They include, but are not limited to: portfolios, oral recitations, teacher observation records, and assemblies.

BCS's educational program shall commit itself to attaining the levels of achievement specified in the Charter School proposal:

1. *Evaluation/Assessment:* BCS shall offer kindergarten through eighth grade and will evaluate students using objective and subjective assessment tools. Multiple assessment tools will be used to document student achievement including but not limited to: standardized tests, performance assessment, rubrics, student portfolios, and teacher assessment. All assessment will remain in compliance with Alaska State Standards and testing. A combination of these assessments will be used to develop an individual student monitoring plan wherein a collaborative effort will be made by students, parents, and teachers to continue to track and evaluate individual progress.
2. BCS will assist each child in achieving his or her maximum potential. Individual student plans will be developed and utilized to record and monitor growth/progress over time. Success will be defined, not by single test scores, but through the measurement of individual growth/progress over a minimum of three years, and achievement of individual goals.
3. 80% of students will perform at a minimum of 80% mastery on the Bonnie River's Gradalis Education Assessment.

**Reporting:** The BCS APC Board will conduct an annual review of academic progress in meeting its performance goals. The Board will review formative and standardized assessment information. Staff will use assessment data to drive decisions made in curriculum and instruction. Report of results is to be given to the School Board on an annual basis as per Board Policy 6190.

**Waiver Request:** BCS's Charter received a waiver to not participate in MAP testing due to the computer-based nature of the assessment. As a program inspired by Waldorf methods, we is

appropriate to require our students to take tests in an unfamiliar medium will not introduce computers into our curriculum until the fifth grade.

**(vi) The extent to which the proposed project encourages parental and community involvement**

***Parent and community involvement in planning BCS***

BCS began as a parent-driven initiative when four local families joined together in the fall of 2006 to start a home-school co-op using Waldorf Methods. During the 2008-2009 school year, this group formed the Birchtree Parent Guild (BPG). In August of 2009, the BPG split and the Academic Policy Committee (APC) and the BPG became separate entities. Thirteen families and one teacher were now involved with the start-up of BCS. In November of 2009, The MSBSD School Board approved the charter application for BCS. Over 150 children were now interested in attending BCS. The State School Board approved BCS in March 2010. BCS opened in the fall of 2010 with an enrollment of 220 students.

***Parent involvement in program design for BCS***

As the primary governing body designated to oversee and supervise all aspects of the school, the APC consists of five (5) to eight (8) founding parents. This group of founding parents and teachers was instrumental in researching, obtaining rubric and creating the Waldorf-inspired public charter school curriculum used currently at BCS. The APC purchased a rubric of a similarly structured Waldorf-inspired public charter school as a basis for the program design. Using the rubric as a model, the APC crafted a curriculum respectful of the MSBSD parameters and the unique needs of our local community. During this program design process, the APC identified the importance of sustaining open and inclusive governance procedures.

### ***Parent involvement in implementation of BCS***

A significant body of research (Mapp, 2004) indicates that when parents participate in their children's education, the result is an increase in student achievement and an improvement of student's attitudes. Increased attendance, fewer discipline problems and higher aspirations also accompany an increase in parent involvement. Due to this research and our recognition of the parents as the force behind its inception, BCS remains committed to sustaining high levels of parent and community involvement (Mapp, 2004).

In addition, Waldorf education focuses on whole child education. This model is emphasizes the need for consistency between home and learning environment, as well as the creating of rhythms and routines that can be sustained in and out of school. It is therefore a top priority to provide as many opportunities as possible for parents to be integrated into the rhythms of the Birchtree school community. To this end, the BCS Handbook recommends that each BCS family contribute a minimum of 36 volunteer hours each school year.

The following is the three-pronged approach whereby the staff of BCS, the APC and the BPG work together to engage parents and community members:

1. **Effective mechanisms of communication:** regular electronic communication from administration regarding day-to-day functioning of school; school-wide newsletter; individual classroom newsletters; classroom parent meetings; Birchtree parent socials; parent surveys.
2. **Inclusive governance structures:** membership on APC board of directors; membership on the BPG board of directors; APC committee membership; BPG committee membership; general APC and BPG meetings open to all members of BCS and wider community, per Open Meetings Act.

3. **Involvement in day-to-day rhythm of school community:** classroom lead volunteers; classroom-specific volunteering; extra-curricular volunteering; fundraisers; social events open to wider community; chaperoning off-campus events; special projects; playscape monitor; classroom aide.

This three-pronged approach provides parents and community members with the ability to: *give and receive information* pertaining the Birchtree school community, *make social connections* with other BCS families, have *direct contact and input* with BCS students, teachers and staff, *fulfill volunteer hour requirements, raise funds* for school needs, and *use their wide-ranging talents and life experiences* to enrich the Birchtree school community.

**(vii) Quality of the personnel**

BCS is an Equal Opportunity Employer and complies with Title IX of the Education Amendment Act of 1972, with the American with Disabilities Act, and with all other state and federal employment laws. BCS does not discriminate against any person on the basis of race, religion, color, national origin, age, disability, gender, marital status, and changes in marital status, pregnancy, or parenthood.

The following personnel (resumes included in Appendix C) who will be managing the grant are all part of the regular BCS staffing except for the external evaluator who will be hired and Bonnie River who will be providing the training in Alaska for the Waldorf certification program.

***Project Director:*** Dr. Susan McCauley serves as principal of BCS. She has twenty-one years of experience in public school education, and a long and well-established record of experience with school and district administration in Alaska. Prior to become BCS's principal, Dr. McCauley served for seven years in school-level administrative positions, and for five years as Director of Education for the MSBSD. She earned a Ph.D. in Educational Leadership & Policy

in 2005 from the University of Alaska Fairbanks. Additionally, Dr. McCauley has served as an independent consultant for the Alaska Department of Education in the areas of curriculum management and school district audits. Currently, Dr. McCauley has been asked to assist the Alaska Department of Education with four districts in rural Alaska who have been identified as needing support in the development of curriculum management systems. Dr. McCauley manages the day-to-day operations of BCS, reporting to the APC. Dr. McCauley has ability to leverage the vast network she has throughout her service in public education and through her involvement with the United Way, the Mat-Su Health Foundation Board, and the Palmer Arts Council.

***Project Coordinator:*** Cathy Busbey will provide the day-to-day management of the Implementation Project in cooperation with the Project Director. Busby will report regularly to the Project Director about the daily operations of the project. She holds a Type B administrative Certificate and is employed in the role of Assistant Principal for BCS. She has over twenty-one years of experience in education, with certifications in elementary education, physical education and a Masters in Educational Leadership. Her excellence organizational and interpersonal skills enable her to coordinate this project efficiently and effectively.

***Treasurer, BPG:*** Greg Stuckey's education and experience make him uniquely qualified to be responsible for the financial management system of BPG and the accounting for this project. He holds a Masters in Business Administration and has taken fifteen credits in accounting courses including governmental fund accounting. He also has supplemented his formal education with several Falmouth courses covering the A-133, A-102, and A-87 circulars. His experience managing the accounting function of an organization comes from six years managing the Chilkoot Indian Association, 2003 through 2009, where he developed the financial management

system with assistance from accounting consultants. He was ultimately responsible for supervising the accounting department and six other departments that reported to him in his role of Tribal Administrator. The organization's budget comprised over a dozen federal grants, contracts, and cooperative agreements culminating in an approximate budget of 1.5 million.

***Model Classroom Coordinator:*** Donna Levesque will provide the onsite model classroom for BCS's teachers. She has taught for over 20 years, the last 12 of which have been in Waldorf education. Her tenure includes classroom instruction from kindergarten through 12th grade, university lectures on child development, parent education workshops, curriculum development, and mentoring. As a master Waldorf teacher, she has guided a class from first through eighth grade, later graduating three other Waldorf middle school classes.

***Compassionate Campus Coordinator:*** Tracey Houser is BCS's counselor who will be responsible for implementing the Compassionate Campus Project for BCS. Tracey holds a B.A. in English Literature, and Masters of Education in School Counseling. Tracey is well-versed and experienced in Waldorf education and philosophy having home-schooled her daughter using a Waldorf-inspired approach.

***Waldorf Certification Training Coordinator:*** Bonnie River, who serves as Chair for the Waldorf Teacher Training Program at Rudolph Steiner College, will facilitate the cohort meetings and webinars for the Waldorf Certification Program. Ms. River has been teaching for over 35 years in public schools, Waldorf schools, and Montessori schools. She has founded two Waldorf schools and serves as Educational Director for Journey Charter School in Aliso Viejo, California. Her expertise includes organizational, managerial, administrative, as well as pedagogical skills including curriculum design, instruction and assessment.

***Project External Evaluator:*** BCS and the BPG will work cooperatively to develop the specifications of the Request for Proposals for this evaluation. The evaluation of responses to the RFP will be shared by the Project Director with the BPG. Criteria will be developed for selecting a contractor from among the RFP respondents and will include a method for scoring vendor responses against specific criteria. This process will simplify the evaluation process and enable the BCS to explain why any responding vendor was or was not selected. The standards and competencies, developed by the American Evaluator Association, will form the basis for selection criteria to secure a third-party evaluator for this project.

BCS recognizes the importance and value of providing students with an educational environment comprised of staff who are highly qualified and represent a diverse community. To provide such a learning environment, BCS has searched both locally via job fairs and the Matanuska-Susitna Job Posting venue and nationally via Waldorf recruiting sites for teachers and staff members who will best fit the academic needs of the students and who subscribe to a whole child philosophy of education.

***BCS Teachers:*** Qualified, dedicated teachers are the most important resource for implementing a rigorous educational program. BCS's highly qualified, certified teachers were selected through a highly competitive process based on their outstanding qualities both as educators and individuals. Our teachers truly exemplify the whole child philosophy as they are avid learners who value personal improvement, self-reflections and self-evaluation. In addition, they are vested in the community and work to make a difference in the Mat-Su Valley. They strive for excellence in all that they do and work to contribute to the environment and society at large.

**(viii) Quality of the management plan**

The Project Director and Project Manager will guide BCS’s Implementation Project. Duties and tasks will be delegated in a manner to ensure that activities needed for the successful completion of the project will occur on time and within budget.

**Objective 1:** Maintain a culture of excellence and high expectations for all students..

**Objective 2:** Assure quality, Waldorf-trained teachers in every classroom.

**Objective 3:** Promote parent involvement in and satisfaction with BCS.

Objective	Activity	Date	Person Responsible
Objective 3	Weekly School Bulletins	Oct 2011 - May 2012	Project Coordinator
Objective 3	Monthly School newsletter	Oct 2011 - May 2012	Project Coordinator
Objective 1, Attendance	Develop attendance policy	10/1/2011	Project Coordinator
Objective 1, Compassionate Campus	Establish student buddies for students who need support for behavior	10/1/2011	Compassionate Care Coordinator
Objective 1, Compassionate Campus	Conduct grade-level meetings to determine what students perceive as the criteria for a compassionate campus	10/1/2011	Compassionate Care Coordinator
Objective 1, Academic Achievement	Teachers will administer quarterly assessment based on the Gradalis Assessments aligned to Alaska grade Level Expectations	10/1/2011	Project Director / Project Coordinator
Objective 1, Academic Achievement	Teachers and Project Director will meet in teams to develop a plan based on data from assessments to reinforce any missing skills or concepts.	10/1/2011	Project Director / Project Coordinator
Objective 2, Waldorf Certification	Waldorf Teacher Certification Program - Class Cluster Webinars	10/1/2011	Waldorf Training Coordinator
Objective 2	Teacher Observation Using Main Lesson Observation Protocol	10/1/2011	Project Director / Project

<b>Objective</b>	<b>Activity</b>	<b>Date</b>	<b>Person Responsible</b>
			Coordinator
Objective 2	Model Classroom Observations & Conference	10/1/2011	Waldorf Classroom Coordinator / Teachers
Objective 3	Thank you system set up	10/1/2011	BPG
Objective 3	Student assembly demonstrating learning	10/1/2011	STET / Teachers
Objective 1, Attendance	Communicate attendance policy to parents	11/1/2011	Project Coordinator
Objective 2, Waldorf Certification	Waldorf Teacher Certification Program On-Site Practicum	11/1/2011	Waldorf Training Coordinator
Objective 2, Waldorf Certification	Waldorf Teacher Certification Program - Class Cluster Webinars	11/1/2011	Compassionate Campus Coordinator
Objective 3	Volunteer system created	11/1/2011	BPG
Objective 1, Compassionate Campus	Conduct parent meeting to determine what parents perceive as the criteria for a compassionate campus	12/1/2011	Compassionate Campus Coordinator
Objective 1, Compassionate Campus	Identify school-wide behavior expectations	12/1/2011	Compassionate Campus Coordinator
Objective 1, Compassionate Campus	Establish school-wide classroom buddies with grade-level partner	12/1/2011	Compassionate Campus Coordinator
Objective 1, Academic Achievement	Teachers will administer quarterly assessment based on the Gradalis Assessments aligned to Alaska grade Level Expectations	12/1/2011	Project Director / Project Coordinator
Objective 1, Academic Achievement	Teachers and Project Director will meet in teams to develop a plan based on data from assessments to reinforce any missing skills or concepts.	12/1/2011	Project Director / Project Coordinator
Objective 2	Teacher Observation Using Main Lesson Observation Protocol	12/1/2011	Project Director / Project Coordinator

<b>Objective</b>	<b>Activity</b>	<b>Date</b>	<b>Person Responsible</b>
Objective 2	Model Classroom Observations & Conference	12/1/2011	Waldorf Classroom Coordinator/ Teachers
Objective 3	Student assembly demonstrating learning	12/1/2011	Master Waldorf Teacher / Teachers
Objective 3	School Concert	12/1/2011	Master Waldorf Teacher / Teachers
Objective 1, Compassionate Campus	Conduct monthly school-wide assemblies for teaching behavior expectations	Jan - May 2012	Compassionate Campus Coordinator
Objective 1, Compassionate Campus	Conduct weekly activities utilizing grade level partners	Jan - May 2012	Compassionate Campus Coordinator
Objective 2, Waldorf Certification	Waldorf Teacher Certification Program - Class Cluster Webinars	1/1/2012	Waldorf Training Coordinator
Objective 2, Waldorf Certification	Waldorf Teacher Certification Program - On-Site Field Experience	2/1/2012	Waldorf Training Coordinator
Objective 2, Waldorf Certification	Waldorf Teacher Certification Program -On-Site Practicum	2/1/2012	Waldorf Training Coordinator
Objective 2, Waldorf Certification	Waldorf Teacher Certification Program- Class Cluster Webinars	2/1/2012	Waldorf Training Coordinator
Objective 3	BPG retreat with Foraker training for board effectively	2/1/2012	BPG / Foraker Trainers
Objective 1, Academic Achievement	Teachers will administer quarterly assessment based on the Gradalis Assessments aligned to Alaska grade Level Expectations	3/1/2012	Project Director / Project Coordinator
Objective 1, Academic Achievement	Teachers and Project Director will meet in teams to develop a plan based on data from assessments to reinforce any missing skills or concepts.	3/1/2012	Project Director / Project Coordinator

<b>Objective</b>	<b>Activity</b>	<b>Date</b>	<b>Person Responsible</b>
Objective 2, Waldorf Certification	Waldorf Teacher Certification Program - On-Site Field Experience	3/1/2012	Waldorf Training Coordinator
Objective 2	Teacher Observation Using Main Lesson Observation Protocol	3/1/2012	Project Director / Project Coordinator
Objective 2	Model Classroom Observations & Conference	3/1/2012	Waldorf Classroom Coordinator / Teachers
Objective 3	Student assembly demonstrating learning	3/1/2012	Master Waldorf Teacher / Teachers
Objective 1	Student internal assets and self evaluation survey	4/1/2012	Compassionate Care Coordinator
Objective 1, Academic Achievement	Alaska's Standard Based Assessments and the Terra Nova Assessment	4/1/2012	Project Director / Project Coordinator
Objective 2, Waldorf Certification	Waldorf Teacher Certification Program - Class Cluster Webinars	4/1/2012	Waldorf Training Coordinator
Objective 3	Develop and conduct parent satisfaction survey	4/1/2012	BPG
Objective 3	School Concert	4/1/2012	Master Waldorf Teacher / Teachers
Objective 1, Academic Achievement	Teachers will administer quarterly assessment based on the Gradalis Assessments aligned to Alaska grade Level Expectations	5/1/2012	Project Director / Project Coordinator
Objective 1, Academic Achievement	Teachers and Project Director will meet in teams to develop a plan based on data from assessments to reinforce any missing skills or concepts.	5/1/2012	Project Director / Project Coordinator
Objective 2, Waldorf Certification	Waldorf Teacher Certification Program - On-Site Field Experience	5/1/2012	Waldorf Training Coordinator
Objective 2	Teacher Observation Using Main Lesson Observation Protocol	5/1/2012	Project Director / Project Coordinator

<b>Objective</b>	<b>Activity</b>	<b>Date</b>	<b>Person Responsible</b>
Objective 2	Model Classroom Observations & Observations	5/1/2012	Waldorf Classroom Coordinator / Teachers
Objective 3	Student assembly demonstrating learning	5/1/2012	Master Waldorf Teacher / Teachers
Objective 2, Waldorf Certification	Waldorf Teacher Certification Program - On-Campus Art of Teaching (K – 4)	7/1/2012	Waldorf Training Coordinator
Objective 2, Waldorf Certification	Waldorf Teacher Certification Program - On-Campus Hybrid Program	7/1/2012	Waldorf Training Coordinator
Objective 2, Waldorf Certification	Waldorf Teacher Certification Program - On-Campus Art of Teaching (5 – 8)	7/1/2012	Waldorf Training Coordinator
Objective 1, Compassionate Campus	Conduct monthly school-wide assemblies for teaching behavior expectations	Aug 2012 - May 2013	Compassionate Campus Coordinator
Objective 1, Compassionate Campus	Conduct weekly activities utilizing grade level partners	Aug 2012 - May 2013	Compassionate Campus Coordinator
Objective 2, Waldorf Certification	Waldorf Teacher Certification Program - On-Site Practicum	8/1/2012	Waldorf Training Coordinator
Objective 2, Waldorf Certification	Waldorf Teacher Certification Program - Class Cluster Webinars	8/1/2012	Waldorf Training Coordinator
Objective 2, Waldorf Certification	Waldorf Teacher Certification Program - On-Site Field Experience	9/1/2012	Waldorf Training Coordinator
Objective 3	Weekly School Bulletins	Oct 2012 - May 2013	Project Coordinator
Objective 3	Monthly School newsletter	Oct 2012 - May 2013	Project Coordinator
Objective 1, Academic Achievement	Teachers will administer quarterly assessment based on the Gradalis Assessments aligned to Alaska grade Level Expectations	10/1/2012	Project Director / Project Coordinator

<b>Objective</b>	<b>Activity</b>	<b>Date</b>	<b>Person Responsible</b>
Objective 1, Academic Achievement	Teachers and Project Director will meet in teams to develop a plan based on data from assessments to reinforce any missing skills or concepts.	10/1/2012	Project Director / Project Coordinator
Objective 2	Teacher Observation Using Main Lesson Observation Protocol	10/1/2012	Project Director / Project Coordinator
Objective 2	Model Classroom Observations	10/1/2012	Master Waldorf Teacher / Teachers
Objective 2	Post Observation conference	10/1/2012	Master Waldorf Teacher
Objective 3	Volunteer management database created	10/1/2012	BPG / Treasurer
Objective 3	BPG attends four course volunteer management Foraker training	10/1/2012	BPG / Foraker Trainers
Objective 3	Student assembly demonstrating learning	10/1/2012	Master Waldorf Teacher / Teachers
Objective 2, Waldorf Certification	Waldorf Teacher Certification Program - On-Site Practicum	11/1/2012	Waldorf Training Coordinator
Objective 2, Waldorf Certification	Waldorf Teacher Certification Program - Class Cluster Webinars	11/1/2012	Waldorf Training Coordinator
Objective 1, Academic Achievement	Teachers will administer quarterly assessment based on the Gradalis Assessments aligned to Alaska grade Level Expectations	12/1/2012	Project Director / Project Coordinator
Objective 1, Academic Achievement	Teachers and Project Director will meet in teams to develop a plan based on data from assessments to reinforce any missing skills or concepts.	12/1/2012	Project Director / Project Coordinator
Objective 2, Waldorf Certification	Waldorf Teacher Certification Program - On-Site Webinars	12/1/2012	Waldorf Training Coordinator
Objective 2	Teacher Observation Using Main Lesson Observation Protocol	12/1/2012	Project Director / Project Coordinator

<b>Objective</b>	<b>Activity</b>	<b>Date</b>	<b>Person Responsible</b>
Objective 2	Model Classroom Observations & Conference	12/1/2012	Master Waldorf Teacher / Teachers
Objective 3	Student assembly demonstrating learning	12/1/2012	Waldorf Classroom Coordinator / Teachers
Objective 3	School Concert	12/1/2012	Master Waldorf Teacher / Teachers
Objective 1, Compassionate Campus	Implement peer coaching and student government system for reinforcing student behaviors	1/1/2013	Compassionate Campus Coordinator
Objective 2, Waldorf Certification	Waldorf Teacher Certification Program - Class Cluster Webinars	1/1/2013	Waldorf Training Coordinator
Objective 2, Waldorf Certification	Waldorf Teacher Certification Program - On-Site Field Experience	2/1/2013	Waldorf Training Coordinator
Objective 2, Waldorf Certification	Waldorf Teacher Certification Program - On-Site Practicum	2/1/2013	Waldorf Training Coordinator
Objective 2, Waldorf Certification	Waldorf Teacher Certification Program - Class Cluster Webinars	2/1/2013	Waldorf Training Coordinator
Objective 3	BPG retreat with Foraker training for board effectively	2/1/2013	BPG / Foraker Trainers
Objective 1, Academic Achievement	Teachers will administer quarterly assessment based on the Gradalis Assessments aligned to Alaska grade Level Expectations	3/1/2013	Project Director / Project Coordinator
Objective 1, Academic Achievement	Teachers and Project Director will meet in teams to develop a plan based on data from assessments to reinforce any missing skills or concepts.	3/1/2013	Project Director / Project Coordinator
Objective 2, Waldorf Certification	Waldorf Teacher Certification Program - On-Site Field Experience	3/1/2013	Waldorf Training Coordinator

<b>Objective</b>	<b>Activity</b>	<b>Date</b>	<b>Person Responsible</b>
Objective 2, Waldorf Certification	Waldorf Teacher Certification Program - Class Cluster Webinars	3/1/2013	Waldorf Training Coordinator
Objective 2	Teacher Observation Using Main Lesson Observation Protocol	3/1/2013	Project Director / Project Coordinator
Objective 2	Model Classroom Observations & Conference	3/1/2013	Waldorf Classroom Coordinator / Teachers
Objective 3	Student assembly demonstrating learning	3/1/2013	Master Waldorf Teacher / Teachers
Objective 1	Student internal assets and self evaluation survey	4/1/2013	Compassionate Campus Coordinator
Objective 1, Academic Achievement	Alaska's Standard Based Assessments and the Terra Nova Assessment	4/1/2013	Project Director / Project Coordinator
Objective 2, Waldorf Certification	Waldorf Teacher Certification Program - Class Cluster Webinars	4/1/2013	Waldorf Training Coordinator
Objective 3	Develop and conduct parent satisfaction survey	4/1/2013	BPG
Objective 3	School Concert	4/1/2013	Master Waldorf Teacher / Teachers
Objective 1, Academic Achievement	Teachers will administer quarterly assessment based on the Gradalis Assessments aligned to Alaska grade Level Expectations	5/1/2013	Project Director / Project Coordinator
Objective 1, Academic Achievement	Teachers and Project Director will meet in teams to develop a plan based on data from assessments to reinforce any missing skills or concepts.	5/1/2013	Project Director / Project Coordinator
Objective 2, Waldorf Certification	Waldorf Teacher Certification Program - On-Site Field Experience	5/1/2013	Waldorf Training Coordinator
Objective 2	Teacher Observation Using Main Lesson Observation Protocol	5/1/2013	Project Director / Project Coordinator

Objective	Activity	Date	Person Responsible
Objective 2	Model Classroom Observations & Conference	5/1/2013	Waldorf Classroom Coordinator / Teachers
Objective 3	Student assembly demonstrating learning	5/1/2013	Master Waldorf Teacher / Teachers
Objective 2, Waldorf Certification	Waldorf Teacher Certification Program - On-Campus Art of Teaching (K – 4)	7/1/2013	Waldorf Training Coordinator
Objective 2, Waldorf Certification	Waldorf Teacher Certification Program - On-Campus Hybrid Program	7/1/2013	Waldorf Training Coordinator
Objective 2, Waldorf Certification	Waldorf Teacher Certification Program - On-Campus Art of Teaching (5 – 8)	7/1/2013	Waldorf Training Coordinator

**(ix) The extent to which the proposed project will assist educationally disadvantaged student in meeting State academic content standards and State student academic achievement standards**

BCS complies with all federal and state regulations and laws pertaining to special education students. Working cooperatively with the MSBSD and the LEA, the school ensures that all students who attend BCS receive appropriate education in the least restrictive environment. BCS complies with all special education regulations as outlined in the Individuals with Disabilities Education Act IDEA, Section 504 of the Rehabilitation Act, Title II of the American with Disabilities Act, and all other civil rights enforced by the United States Department of Education Office of Civil Rights.

BCS collaborates with the MSBSD to serve children with disabilities in the same manner as the Mat-Su District serves children with disabilities in other schools. BCS provides supplementary and related services on site at the charter school to the same extent to which the

Mat-Su District has a policy or practice of providing such services on site to its other public schools.

Federal and State funding for special education services at BCS is delivered to the school as part of the annual funding process that provides other per-pupil allocations, ensuring that the funds are provided on the same basis as the State provides funds to other public schools, utilizing a proportional distribution scheme based on relative enrollment of children with disabilities.

BCS employs two full time special education teachers with appropriate Alaska special education teaching certifications and two special education teaching assistants. These special education teachers develop and implement Individual Education Plans (IEPs) and work with grades teachers to guarantee that all requirements outlined in a student's IEP are being met and provided in a manner that maximizes students' learning in the least restrictive environment.

BCS's philosophy focuses on educating the whole child with developmentally appropriate learning opportunities that enable students to reach their greatest potential. This model is designed to include and aid high-risk students and to provide equal access to the academic and social programs in the school. BCS's special education population enrollment in the first year of the school clearly indicates families' belief in the appropriateness of this approach for students who are at-risk. With a special education population of 12.5% of its total enrollment, BCS currently has the highest percentage of special education students attending a charter school in the MSBSD. Additionally, BCS is the only charter school in the District that has enrolled intensive needs students. Currently, we have three students who qualify for intensive needs funding.

The unique learning environment offered at BCS will have a positive impact on all students particularly those who at-risk and educationally disadvantaged. The looping model utilized in

both the elementary and middle school grades works to foster stronger relationships between students and teachers thus positively impacting student's desire to learn. Because teachers will not have to get to know new students each year, more time can be spent on focused, individualized instruction. Teachers are also much more familiar with students' development and understand in greater detail how each student learns best. As research clearly indicates strong teacher-student relationships are needed to increase achievement for all students particularly those who are at-risk. With BCS's whole child educational model, students who may initially struggle with academics will have the opportunity to succeed in other areas of the curriculum such as drawing, painting, woodworking, or music. These successes help foster self-efficacy beliefs, which in turn work to increase academic achievement.

## Other Attachment File(s)

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## APPENDIX D

### References

- Balfanz, R., Herzog, L., & Iver, D. J. M. (2007). Preventing student disengagement and keeping students on the graduation path in urban middle-grades schools: Early identification and effective interventions. *Educational Psychologist, 42*(4), 223-235. Retrieved from <http://www.informaworld.com/openurl?genre=article&id=doi:10.1080/00461520701621079>
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- Hedge, A.V., & Casidy, D.J. (2004). Teacher and parent perspectives on looping. *Early Childhood Education Journal, 32*(2), 133-138.
- Jensen, E. (2008). *Brain-based learning: The new paradigm of teaching*. Thousand Oaks, CA: Corwin Press.
- Mapp, K. (2004). *Family engagement: Helping students graduate: A strategic approach to dropout prevention* (pp. 99-113). Larchmont, NY: Eye on Education.
- Montalvo, G.P., Mansfield, E.A., & Miller R.B. (2007). Liking or disliking the teacher: Student motivation, engagement and achievement. *Evaluation and Research in*

*Education*, 20(3), 144-158.

Silva, Elena. On the clock: Rethinking the ways schools use time. *Education Sector Reports*, January 2007.

Smink, J., Reimer, M.S., & National Dropout, P.C. (2005). Fifteen effective strategies for improving attendance and truancy prevention. *National Dropout Prevention Center Network*. Retrieved from <http://search.ebscohost.com/login.aspx?direct=true&db=eric&AN=ED485683&site=ehost-live>.

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## **APPENDIX A**

### **Enrollment Lottery Process**

#### **A. Admissions Criteria**

Enrollment policies, access to curriculum, services and activities of the program are nondiscriminatory with regard to religion, language, physical handicap, or national origin of children and their parents.

Children of the originators of the school and those who have actively participated in its initiation and organization will have a priority for enrollment up to ten percent (10%) of final enrollment.

The application procedure and timelines for admission will be the same as that of other alternative programs in Matanuska Susitna Borough School District (MSBSD).

Admissions will be on a first come, first served basis. If the number of students applying for admission exceeds the openings available, entrance, except for the existing students of BCS and the understated preferences, shall be determined by lottery process. The following will be given preference for admission to the school:

- Siblings of students currently enrolled in the school.
- Students of Employees of the School.
- Students of Founding Families.

The minimum age of the children entering the school will be:

Kindergarten: Age 5 by September 1<sup>st</sup>

First Grade: Age 6 by September 1<sup>st</sup>

#### **B. Lottery Process**

Schedule for Intent Forms and Lottery

- No later than the last week of March – All Intent Forms available
- First week of April – Returning Student intent Forms due
- April 15 – New Student Intent Forms due
- The first Wednesday after April 15 at 7pm – Lottery

Intent forms will be available no later than the last week of March from BCS Main Office (once the school opens) and may be downloaded from the BCS Web Site. These intent forms should be completed and returned as soon as possible but no later than April 15<sup>th</sup>. It is important to receive all intent forms from interested parties on or before April 15<sup>th</sup>, so that should the need arise, those names will be included in the lottery. They will be dated and times according to when they are received.

If there is more interest in attendance than what is filled by the children of BCS employees and the siblings of students currently in the program, we will hold a lottery (a random drawing) with the names from intent forms ( turned in by April 15<sup>th</sup>) on the first Wednesday following April 15<sup>th</sup> at 7pm in the school foyer (once the school opens). An effort will be made to maintain a balance of boys and girls. Parents may attend the lottery, but are not obligated to do so. The results will be witnessed, and parents will be notified of the results. *BCS commits to making the lottery and enrollment procedures and practices clear and transparent to parents, staff and community.*

### **C. Once Admitted**

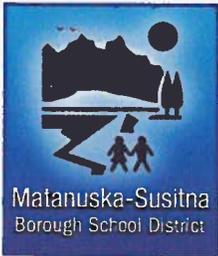
Upon acceptance to Birchtree Charter School, parents will be asked to read the parent handbook and agree to the terms that are identified in the handbook. Birchtree Charter School will request support of the following, as well as other requirements:

- Encourage active support of the school through volunteering their time and/or other resources.
- Commitment to provide a home environment that is conducive to learning. In particular, this will mean agreeing to limit children's exposure to electronic media influences such as television, movies, video games, etc.
- The willingness of the parent to gain understanding of the Whole Child Curriculum and the Waldorf Educational approach and willingness of the parent to support the education in the home.
- During the admissions process, parents will be asked to become familiar with these obligations through written material and/or informational meetings. Families may be asked to take a tour of the school, fill out an application, and then, after the child is enrolled in the school, schedule a family interview. Prior to the interview, any existing school record or IEP for the child(ren) must be provided for confidential review by the BCS staff. During the interview, the family commitments listed above will be discussed. A family is expected to complete this process and also actively demonstrate their level of commitment to the school and its philosophy.

### **D. Admissions Procedures**

- Intent to return forms: All returning students to BCS should submit an intent-to-return form to their classroom teacher or the office no later than the first week of April.
- Registration: Intent forms will be collected in the spring. Fall registration will take place the first full week of August.
- Withdrawals: Students/families who need to withdrawal for a extended period of time from BCS, for medical reasons, family emergencies, or some other legitimate reason will have their positions held at the top of the waiting list and will be readmitted as soon as space become available.
- Before school starts or as opening occur: If a family on the waiting list is offered an opening prior to the start of the school year or as space becomes available during the school year, they have 48 hours to accept. If they decline the offer, their name is removed from the waiting list and they must resubmit an intent form the following spring, likely go through an interview, and possibly through a lottery.

- Vacancies in the fall: In the case that there are still vacancies after placing students from the waiting list, open enrollment will be posted and intent forms will be collected during the first two weeks of August. Procedures would be followed as outlined for the spring enrollment and lottery.



OFFICE OF THE SUPERINTENDENT

Dr. Deena M. Paramo

*Mission: Mat-Su Borough School District prepares students for success*

August 19, 2011

RE: Support for Birchtree Charter School's Grant Application

To Whom it May Concern,

I am writing to express support for the grant application submitted by Birchtree Charter School. As Superintendent for the Mat-Su Borough School District, I am keenly aware of the need for a wide-range of educational opportunities for our children. As the second largest school district in Alaska serving over 17,000 children and spanning 25,000 square miles; we are all about innovative opportunities and program choices.

In just their second year, Birchtree Charter School has already made a niche in our school community by providing educational opportunities inspired by the methods of Waldorf education. Birchtree Charter School provides its 200+ students with an innovative, standards-based education using art, music, movement, and the teaching of foreign languages to support and enhance the study of reading, writing, history, science, and mathematics. The opportunities for professional development provided by this grant will increase the capacity of staff. As the sole Waldorf inspired school in our District, parents from all over the Mat-Su Borough who desire this program option send their children to Birchtree Charter School.

Birchtree Charter School staff works hard to provide Mat-Su Borough School District students with the necessary skills and tools to achieve high standards and grow into responsible and successful members of their community. As Superintendent for the Mat-Su Borough School District, I value the program options Birchtree Charter School is able to provide to some of our families and I therefore strongly support their grant application.

Sincerely,

Deena M. Paramo, Ed.D.  
Superintendent

# Alaska State Legislature

**SESSION ADDRESS:**

Alaska State Capitol  
Juneau Alaska 99801  
Phone: 907-465-3743  
Fax: 907-465-2381

**INTERIM ADDRESS:**

600 E Railroad Avenue  
Wasilla AK 99654  
Phone: 907-376-3725  
Fax: 907-376-4768

## Representative Carl Gatto

August 18, 2011

RE: Support for Birchtree Charter School - Palmer Alaska

Dear Charter Review Board,

As State Representative of House District 13-Palmer, I strongly support Birchtree's application for a federal charter school start-up grant. The Mat-Su Borough experienced the highest rate of growth in Alaska and this growth brings with it an increased need for alternative educational opportunities in our community.

Birchtree Charter School is currently the only school in the large Mat-Su Borough offering a whole-child approach to education. Birchtree's specific curriculum and methods are inspired by Waldorf education which integrates the arts into a rigorous academic program. The developmental phases of childhood form the basis of both what is taught and the methods utilized. Interest in this option for education in our community is clearly evidenced by Birchtree's enrollment. During its first year of operation, Birchtree had a projected enrollment of 160 students and an actual enrollment of 219 students. Birchtree's current enrollment at the beginning of its second year is 271 students with a waitlist exceeding 100 students.

Birchtree's governing board, the Birchtree Academic Policy Committee, has identified teacher training as its number one priority. Teachers at this school will be required to have both Dept. of Education Certification and Waldorf School Training. While Birchtree's teaching staff possess an average of 10 years' experience in public school education (ranging from 1 year to 23 years of experience), all but one of Birchtree's 16 certified teachers are new to Waldorf education. Birchtree is requesting funding to support professional development leading to a Waldorf teaching certificate for 100% of its instructional staff.

I urge you to support the application for the Birchtree Charter School. I believe this school will meet the objectives of providing students with the necessary skills and tools to achieve high standards and grow into responsible and successful members of our society.

Thank you for your consideration,

A handwritten signature in black ink that reads "Carl Gatto".

Carl Gatto  
Representative



201 Barrow Street #8 Anchorage, Alaska 99501  
info@alaskapolicyforum.org  
907.334.5853

August 19, 2011

Dear Madam or Sir:

I am writing to express support for Birchtree Charter School (BCS) in their application for Non-SEA Planning and Implementation Grant. As Executive Director of a local non-profit that specializes in Alaska education policy, I understand the need for kids to have more opportunity, and the role that great schools like BCS play in empowering parents to get involved in their child's education.

The statistics tell an exciting story. Birchtree Charter School takes a unique "whole child" approach to education that fills clear demand in the fastest-growing community in Alaska. The Matanuska-Susitna school district is the second largest in the state. Demand continues to demonstrate the need this school fills.

The proof is in the numbers. Actual demand for BCS has far exceeded both projections and capacity. Currently there is a waiting list to get into the school of more than 100 students. Because of this increased demand, the teaching staff has expanded from 13 to 16 state-certified teachers.

Thank you for your consideration. I am confident that Birchtree Charter School will provide the students of the Matanuska-Susitna Borough School District with the skills and knowledge necessary for life. Through efforts like Birchtree Charter School, we can work towards fulfilling the vision of the best education opportunity for all children in Alaska.

Sincerely,



Jeremy Thompson  
Executive Director  
Alaska Policy Forum

Erick Cordero Giorgana  
1150 S Colony Way # 3, PMB 167  
Palmer, AK 99645  
(907) 982-0353

August 20<sup>th</sup>, 2011

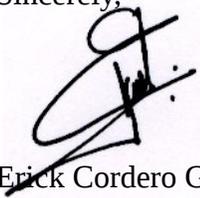
To Whom It May Concern:

I am writing this letter of support for Birchtree Charter School in regards to their grant application. I currently serve as Vice-President of the MatSu Borough School Board and have been impressed by the level of professionalism and quality by this Waldorf-based charter school.

Birchtree offers an alternative means of educating our children and it allows parents in our community to find what meets the needs of their children. We know that not all children learn the same way and all of our charter schools offer a great opportunity for children to attain their educational needs.

I urge to support Birchtree's application and I am sure that they will continue to provide a high-quality education for our children.

Sincerely,

A handwritten signature in black ink, appearing to read 'Erick Cordero Giorgana', written over a light blue rectangular background.

Erick Cordero Giorgana

# Appendix C

## Susan A. McCauley, Ph.D.

P.O. Box 2537  
Palmer, AK 99645  
E-mail: susan.mccauley@matsuk12.us  
Home (907) 355-2137 Office (907) 745-1831

### EDUCATION

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Ph.D. University of Alaska Fairbanks, 2008; Education Leadership & Policy  
Earned 15 credits Breadloaf School of English, Middlebury College, Vermont, 1999; English Literature  
M.S. Western Maryland College (now McDaniel College), 1994; Educational Administration  
B.S. Pennsylvania State University, 1990; Elementary Education, University Scholars Program

### LICENSURE

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Alaska Type B, School Superintendent  
Alaska Type B, Principal grades K – 12  
Alaska Type A, Elementary grades K – 6

### PROFESSIONAL EXPERIENCE

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**Principal** Birchtree Charter School, Matanuska-Susitna Borough School District, July 2010 - present

- Oversee the instructional program, budget and facility for 220-student school with grades K – 8
- Worked closely with Mat-Su Borough Assembly as first principal to utilize new Borough ordinance for school site selection process
- Oversaw completion of new 17,000 square foot school facility
- Selected and hired 14 certified and 7 classified staff members
- Opened with largest beginning enrollment of any charter school in Mat-Su School District, exceeding projected enrollment by 60 students
- Work collaboratively with the school's governing Board of Directors and 501(c)3 foundation

**Director of Education** Matanuska-Susitna Borough School District, March 2005 – June 2010

- Developed and oversaw implementation of the District's Curriculum Review Cycle
- Authored School Board policies for curriculum review and textbook adoption

- Oversaw District-wide professional development for principals and teachers in implementation of curriculum and instructional materials
- Served as the Director of the District's Curriculum Council
- Evaluated the principals of 14 schools including 4 high schools, 5 middle schools, and 5 elementary schools
- Developed the District's principal selection process and authored related School Board policies
- Facilitated the hiring process for principals and assistant principals hiring 17 principals during my second year as Director of Education
- Initiated and administered the District's Aspiring Principal Cohort in collaboration with UAA
- Served as the budgeting program director for the District's 5 middle schools
- Developed and monitored Title IIA budgets for dropout prevention and curriculum development
- Oversaw the dropout prevention component of the District's Strategic Plan
- Oversaw the District's Talented and Gifted Program

**Adjunct Professor**

University of Alaska Anchorage, June 2009

Taught Educational Leadership & Organization Behavior

**Assistant Principal**

Colony Middle School, Matanuska-Susitna Borough School District  
August 2001 – March 2005

Oversaw staff development and curriculum implementation for 600-student middle school. Responsibilities included: evaluating, with principal, 36 teachers and support staff of 25; designing and conducting all staff development; managing student intervention and enrichment program; overseeing extensive student activity program and budget

**Principal**

Glacier View School, Matanuska-Susitna Borough School District, 1999 – 2001

Managed all aspects of rural K – 12 school for 61 students while teaching high school English

**Middle School Teacher**

Hooper Bay and Mt. Village, Lower Yukon School District, 1995 - 1999

Taught grades 6<sup>th</sup> – 8<sup>th</sup> in traditional, geographically isolated Yup'ik Eskimo communities on the Bering Sea coast and Yukon River

**5<sup>th</sup> grade teacher**

Conewago Valley School District, New Oxford, Pennsylvania, 1990-1995

**PRESENTATIONS & CONSULTATION**

---

Member of Alaska Department of Education Curriculum-to-Standards Alignment Team, April 2010

Presenter at Winter Conference for the Alaska Department of Education, January 2010: *Aligning Curriculum to Alaska Content Standards and Grade Level Expectations*

Presenter at Association of Alaska School Board Annual Conference, November 2009: *Drop-out Prevention Strategies in the Mat-Su Borough School District*

Member of Alaska Department of Education workgroup to determine “meaningful exposure” to content standards in response to Moore vs. State of Alaska, March 2009

Member of Alaska Department of Education Instructional Audit Team, March 2009

Presenter at Alaska Department of Education Curriculum Institute, November 2008

## **COMMUNITY LEADERSHIP**

---

Mat-Su Health Foundation, Board of Directors, currently serving year one of three-year term

Mat-Su Borough Health and Social Service Board, currently serving year two of a three-year term

Palmer Arts Council, Board of Directors

United Way of Mat-Su Board of Directors, 2007 – 2009, President 2009

Mat-Su Substance Abuse Prevention Coalition, Steering Committee, 2008 - 2010

Leadership Anchorage graduate, May 2006

## **REFERENCES**

---

Dr. Steve Atwater, Superintendent, Kenai Peninsula Borough School District (907) 714-8858

Dr. Eric Madsen, Dean, School of Education, University of Alaska Fairbanks (9907) 474-7341

Dr. Robert Crumley, Superintendent, Chugach School District, (907) 522-7400

Mr. Michael Dunleavy, President, Mat-Su Borough School District School Board (907) 841-0399

Ms. Elizabeth Ripley, Executive Director, Mat-Su Health Foundation (907) 352-2863

Ms. Lucy Hope, Director of Student Support Services, Matanuska-Susitna Borough School District  
(907) 746-9233

Ms. Amy Spargo, President, Mat-Su Principals’ Association; Principal, Wasilla Middle School  
(907) 352 5300

Work: (90 [REDACTED])

---

**Professional Profile:**

Dedicated, confident, and student focused educator with a strong commitment to students, staff, and parents who is interested in providing a safe and motivating learning environment. Believes strong communication skills develop lasting relationships with all members of the school community. Will take initiative in improving and implementing educational practices for students. Strong desire to continue in the educational field as an administrator.

**Education:**

Graduate Certificate, Educational Leadership, University of Alaska Anchorage 2010  
MSE Degree, State University of New York at Cortland 1993  
Concentration Adapted Physical Education and Elementary Education  
BSE Degree, State University of New York at Cortland 1987  
Concentration Physical Education

**Certification:**

Type B Administrator Certificate, Alaska  
Type A Teaching Certificate, Alaska; Highly Qualified in the area of Elementary Education and endorsed in physical education  
Permanent Teaching Certificate, New York State areas of Physical Education and Elementary Education

**Professional Experience:**

Mat-Su Borough School District, Palmer, Alaska      Mark Hoffman, Supervisor  
Classroom Teacher      2010-present

- Taught Core reading and math differentiating for student needs
- Served on the school's RTI team for academics
- Member of the school's PBIS team and attended all trainings for PBIS
- Taught a Focus Learning Team on CHAMPS
- Initiated and piloted math intervention program for the classroom

Mat-Su Borough School District, Palmer, Alaska      Dave Nufer and Ed  
Educational Leadership Internship Experience      McClean, Supervisors  
2008-2010

- Teacher in charge (at Finger Lake) when principal was out of the building or out of state – this included running staff meetings, attending to student discipline, communicating with staff and parents on various issues, attending IEP meetings as a district representative, assisting with budget development, and attending after school activities
- Worked closely with the literacy coach to develop and schedule interventions, assist with data dialogue meetings, review student test data, and write grant request for Title 11A funds
- Member of the RTI team which developed procedures and forms for the RTI process







## Greg Stuckey

Gregory M. Stuckey has over five years of experience in Tribal administration and housing projects in Alaska.

Most recently his focus has been on building collaborative partnerships between entities across Alaska. He also is focused assisting Tribes in financing their housing projects with various financing structures and building their financial management capacity.

### Relevant Experience

In 2009 Mr. Stuckey joined the Office of Native American Programs in Anchorage and began providing technical assistance Tribal governments in financing and managing housing projects.

new position he assisted several Tribes finance the new construction of housing units in their communities. He has also provided countless home buyers assistance in understanding the Section 184 mortgage program.

In 2005 Mr. Stuckey, as *Tribal Administrator (TA) for the Chilkoot Indian Association*, implemented a painful restructuring of the Association. This was necessitated by two years of neglect on the part of the Tribe and mismanagement by former Tribal Administrators. His activities brought Bureau of Indian Affairs, Environmental Protection Agency, and Housing and Urban Development grants back into compliance. His actions were instrumental in repairing the reputation of the Tribe to ensure continued funding for the Association.

As TA, Stuckey supervised five departments: Finance and Accounting, Human Resources, Housing and Transportation, Economic Development, and Culture and History. His leadership was essential in developing a sophisticated finance and accounting system for the Tribe allowing them to grow their budget by over 400%.

Mr. Stuckey has extensive experience working with rural non-profit organizations in the area of strategic planning and financial management. He currently serves as Treasurer for the Birchtree Parent's Guild and was President and Treasurer of the Haines Chamber of Commerce board, Vice-Chair of the Haines Borough Public Library board, and elected to the Haines Borough School Board. He is an active member in the Project Management Institute in which he has earned the certification of Project Management Professional.

### Education

Mr. Stuckey received his Master of Business Administration from Walden University in 2008. He holds a Bachelor of Science in Business Administration from the University of Texas at Dallas where he graduated Magna Cum Laude. He has completed numerous professional development programs related to financial management and tribal government.

#### —At a Glance—

- Five years experience in Tribal administration.
- Demonstrated achiever with exceptional knowledge of Tribal governments, business practices, and management tools
- Experience in strategic planning and program development as related to Native Alaskan Tribes
- Master of Business Administration to
- Certified as Project Management Professional (PMP)
- Speaker at Regional Housing Summit 2008
- Speaker at Federal Highway Administration Tribal Conference 2009

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## Tracy M. Houser



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### Education

- 2009, Master of Education in School Counseling

*University of Alaska Anchorage*

- 1998, Master of Arts in Teaching English

*University of Alaska Anchorage*

- 1995, Bachelor of Arts in English Literature

*Middlebury College - Middlebury, Vermont*

### Work Experience

- 2011- present, School Counselor

*Birchtree Charter School - Palmer, Alaska*

Providing assistance to students who experience social and emotional challenges at school. Aiming to implement a school-wide Compassionate Campus program.

- 1998-2008, Classroom Teacher

*Mirror Lake Middle School - Chugiak, Alaska*

Taught seventh and eighth grade language arts, eighth grade math, and reading support for grades six through eight.

- 1996-1997, Family Services Specialist

*The Arc of Anchorage - Anchorage, Alaska*

Provided case management and family support for children and teens who experience developmental disabilities.

- 1995-1996, Cross-Country Ski Coach

*West Anchorage High School - Anchorage, Alaska*

- 1994-1996, Summer Enrichment Coordinator

*The Arc of Anchorage - Anchorage, Alaska*

Coordinated recreational summer activities for children and teens who experience

CURRICULUM VITAE

**NAME:** Bonnie River

**WORK ADDRESS:** Rudolf Steiner College  
9200 Fair Oaks Blvd.  
Fair Oaks, Ca. 95628  
916-961-8727 X- 145  
fax: main:  
confidential:  
mobile: (optional)  
[bonnie.river@steinercollege.edu](mailto:bonnie.river@steinercollege.edu)

**EDUCATION:** *(only accredited degrees listed here, certifications come later)*

University of La Verne, 2007-current (Ph.D., candidate, Organizational Leadership).

Lesley University, 2000-2002 (M.Ed., Curriculum Development & Student Learning).

San Jose State University, 1974 – 1975 ( B.A., Education, Elementary and Secondary ).

Ohio State University, 1966-1970 (transferred course work to SJSU, Education, secondary,  
French & Psychology 600-604, educational psychology).

**PROFESSIONAL ACTIVITIES**

7/10 – current. Educational Director, Journey Charter School, Aliso Viejo, California.

7/10 – current. Chair, Waldorf Teacher Training, Hybrid Modality, Rudolf Steiner College  
Fair Oaks, California.

7/08 – current. Accreditation Liaison Officer, Rudolf Steiner College. Fair Oaks, California.  
Core Faculty, Rudolf Steiner College. Fair Oaks, California

7/06-7/08. Assistant Professor of Education, School of Education, Touro University. Vallejo,  
California.

7/03 – 7/06. Director of Education and Student Services, Live Oak Charter School.  
Petaluma, California.

7/02-7/04. Chair, Educational Support Department, Waldorf School of the Peninsula.  
LosAltos, California.

9/00 – 6/02. Director of Curriculum and Educational Planning, Ruskin Mill Further

Education Centre. Nailsworth, United Kingdom.

7/98 – 6/00. Teacher, Shining Mountain Waldorf School. Boulder, Colorado.

7/89 – 6/97. Teacher, Willow Wood Waldorf School. Sebastopol, California.

7/82 – 7/89. Teacher, Summerfield Waldorf School. Santa Rosa, California.

### **GRANT RESPONSIBILITIES – RESEARCH ACTIVITIES**

2004-2010

Principal co-Investigator with Kim John Payne: Children with Attention-related Difficulties in the Waldorf Classroom. A longitudinal study funded by the Anthroposophical Society of America.

2003-2004

Principal Investigator: At-Risk Youth in a Crafts-Based Community. A study of cognitive abilities and changes in impulsivity in youth at the Ruskin Mill Further Education Centre, Nailsworth, UK. Funded by the United Kingdom Further Education and Careers Foundation.

### **BOOKS**

River, B. (In Development): *Nature, Nurture and Intention: the Shapers of Destiny*. Stroud, Gloucestershire, UK: Hawthorne Press

### **CHAPTER CONTRIBUTIONS**

River, B. (1999) The Therapeutic Aspects of Handwork. In D. Mitchell & P. Livingston (Eds), *Well-Developed Intelligence: Handwork and Practical Arts in the Waldorf School* (pp. 102-107). Boulder, CO: AWSNA Publishers

### **JOURNAL ARTICLES**

River, B. (1986). Weaving a Mantle of Warmth: Community Building through a Kindergarten Parent Program. *Child and Man Magazine*, 20(2), 13-16.

### **MONOGRAPHS**

River, B., (2008). *Campus Communication: Techniques for Engendering Presencing in Meetings*. Fair Oaks, CA: Rudolf Steiner College.

River, B., (2008). *The Compassionate Campus: Enlivening Trust through applying the Eightfold Path of Self-Development*. Maui, HI: Haleakala Waldorf School.

River, B. (2007). *What Can I Do? The Power of Activating Intention in a Child Study*. Santa Rosa, CA: North Bay Beginning Teachers Program, Sonoma County Office of Education.

River, B. (2007). *We Are from the Same Planet but Different Worlds: Waldorf and SDIAE in working with English language learners*. Rohnert Park, CA: Sonoma State University.

## **PRESENTATIONS**

River, B. (2009, October). *Seven Factors of Resiliency: Brought to you by...Waldorf Education* Golden Valley Charter School, Orangevale, CA.

River, B. (2009, September). *What brought me to **this** place? Public school teachers choosing to become Waldorf Teachers*. Sponsored by San Juan Capistrano School District. Journey Charter School, Aliso Viejo, CA.

Bento, W. & River, B. (2009, September). *Where Did I come from and Why am I Here? A Philosophical look at the purpose of education*. Golden Valley Charter School, Orangevale, CA.

River, B. (2009, August). *Serving the under-served: How Waldorf Pedagogical Processes can level the social playing-field*, Kona Pacific Public Charter School, HI.

River, B. (2009, July). *We all have standards: Can we share our definitions, please?* Sponsored by San Juan Capistrano School District. Journey Charter School, Aliso Viejo, CA.

River, B. (2009, April). *Do you see what I am saying? Working with non-verbal learning disorder in full inclusion*. American Autism Society, Northern California Chapter. Early Intervention Conference. Santa Rosa, CA.

River, B. (2009, March). *The organic basis of Waldorf Education: The Waldorf Curriculum reflecting the child's cognitive and physical development*. San Francisco State University, San Francisco, CA. Sponsored the Initiative for Waldorf Education in San Francisco's Public Schools.

River, B. (2009, February). *Child Study as a spiritual deed*. Annual National Waldorf Teachers Conference, Rudolf Steiner College, Fair Oaks, CA.

River, B. (2009, February). *The lens of seven: A Waldorf Teacher's tool for child study*. Pacific Rim Waldorf Teachers Conference, Haleakala Waldorf School, Maui, HI.

River, B. (2009, February). *Educational support work in Waldorf Schools*. Annual National Waldorf Teachers Conference, Rudolf Steiner College, Fair Oaks, CA.

River, B. (2009, January). *California Teaching Credential and Waldorf Teacher Certification: A complimentary and co-creative teacher training*. Explorations in Alternative Teacher

- Education Programs, Sonoma State University, Rohnert Park, CA.
- River, B. (2009, January). *Moving into the mission statement: Charter schools fostering Waldorf Education*. Journey Charter School Retreat. Aliso Viejo, CA.
- River, B. (2008, December). *In the bright mid-winter: Journaling as a destiny-revealing process*. Santa Rosa Junior College, Santa Rosa, CA.
- River, B. (2008, October). *The Student Study Team: Parents, teachers, students, and administrators in collaborative action*. Santa Rosa Junior College, Petaluma, CA.
- River, B. (2008, September). *Good Beginnings: Values Clarification in School Communities*. Sponsored by Old Adobe School District, Petaluma, CA.
- River, B. (2008, August). *Good Beginnings: Values Clarification in School Communities*. Kona Pacific Public Charter School, HI.
- River, B. (2008, July). *The children need us to get along: Role-modeling compassion in a time of violence*. American Association of University Women, Petaluma Chapter, Petaluma, CA.
- River, B. (2008, July). *The same, only different: Generations at school together*. Mt. Diablo Unified School District. Concord, CA.
- River, B. (2008, July). *Planning to plan: The 80/20 rule goes to school*. Mt. Diablo Unified School District. Concord, CA.
- River, B. (2008, June). *Vygotsky, Steiner, Piaget: Phenomenologically-based theories of Education*. Annual BTSA-recognition event, SCOE, Santa Rosa, CA.
- River, B. (2008, May). *Theories of Early Childhood Cognition and Self-Concept*. Santa Rosa Junior College. Petaluma, CA.
- River, B. (2008, May). *Will you awaken? Rudolf Steiner's Philosophy of Freedom: A gauge for community maturity*. Highland Hall Waldorf School. Northridge, CA.
- River, B. (2008, April). *I show up as others see me: The power in projecting upon one another*. American Association of University Women: Conference on Women in Higher Education.
- River, B. (2008, March). *A time for every season: Stories of late-bloomers*. Sonoma County Office of Education, BTSA program. Santa Rosa, CA.
- River, B. (2008, February). *Mathematical constructs, critical thinking, and what do I get to eat for snack?* SCOE Mentor Teachers Retreat. Santa Rosa, CA.
- River, B. (2008, January). *Open Court and Innovation: an Oxymoron? Examining the preparation of reading teachers*. Vallejo Unified School District, Vallejo, CA.

River, B. (2008, January). *Five languages spoken here: the “show me” classroom*. Sonoma State University, CLAD-renewal for clear certificated teachers. Rohnert Park, CA.

River, B. (2007, December). *Assessment and focus on student learning: The pros and cons of high stakes testing*. Solano County Office of Education, Fairfield, CA.

River, B. (2007, December). *So how do we garner the courage to teach? The congruence of Parker Palmer and Rudolf Steiner*.

River, B. (2007, November). *Culturally Creative Communities: The 3 C’s (clarified values, cooperative working, consensus-building)*. AAUW Conference, Thinking Globally and Acting Locally.

River, B. (2007, September). *Another attractive distraction? The inner development of the teacher and the technology of classroom management*. Los Angeles Unified School District. Symposium “Managing High-risk Populations”. Los Angeles, CA.

River, B. (2007, June). *I double-dare you: bully, tease or by-stander the continuum of anti-social behavior*. SCOE symposium on social awareness. Windsor, CA.

River, B. (2007, May). *Movement education, the foundation for thinking*. Santa Rosa Junior College, early childhood educators public offering. Santa Rosa, CA.

River, B. (2007, May). *Chaos: Where brilliant dreams are born: reweaving a frayed social fabric*. Live Oak Charter School. Petaluma, CA.

River, B. (2007, April). *Non-violent communication: The basis of compassionate action*. Solano County Office of Education, Fairfield, CA.

## EDITORIAL RESPONSIBILITIES

### College Publications

Catalogue  
Handbooks- Employee, Faculty, Student  
College Newsletter

## COURSES TAUGHT OR PRESENTLY TEACHING

MA Waldorf Education, Teacher Preparation, Hybrid Program Director  
MA Waldorf Education, Advanced Studies, Hybrid, Program Director  
Literature Review  
Research Methods  
Remedial Education  
Child and Adolescent Psychology

Ontology and Epistemology of Waldorf Education courses

Study of Man

Spiritual Science

Embryology and Genesis

Cosmology

Comparative Studies of Educational Theories

Comparative Studies of Philosophy

Teaching Special Needs Students

Classroom Management

Waldorf Curriculum Classes, Grades K-8

### CAMPUS COMMITTEES

Director of Outreach, Public Schools

Accreditation Committee- Task Force – Chair

Academic Affairs committee

Faculty

Initiatives and Events Committee

### CONSULTANT ACTIVITIES

Gradalis Educational Services

### PROFESSIONAL MEMBERSHIPS

National Council for Teachers of English

National Center for Higher Education Management Systems (NCHEMS)

American Association of University Professors

## Budget Narrative File(s)

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\* **Mandatory Budget Narrative Filename:**

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To add more Budget Narrative attachments, please use the attachment buttons below.

## Budget Narrative

Requested grant funds are budgeted over the two-year program, as shown in the attached proposed budget. Each of the categories of spending are described below:

1. **Personnel:** Not applicable.
2. **Fringe Benefits:** Not applicable.
3. **Travel:** Due to its isolated location, travel expenses to Alaska are quite high. However, it is not possible for our team of teachers to obtain the required level of Waldorf certification training without leaving the state. While the cohort will complete on-line study and intensive weekend trainings within Alaska during the school year, out-of-state travel to Rudolf Steiner College for two intensive summer sessions is required of all training participants. Each travel package includes funds for airfare, ground transportation, lodging and food. All travel expenditures are directly related to the whole staff development program for improved student outcomes. Travel also includes sending two staff members to the grant project coordinator's meeting each year. Budget category number 3 total for Year One is \$38,195 and for Year Two is \$33,645.
4. **Equipment:** The two items qualifying for this category relate to creating an effective system for managing volunteer participation. Required items to complete this objective are computer hardware and funds for software for database development. The total Year One request in category number 4 is \$2150. No category 4 funds are necessary for Year Two.
5. **Supplies:** Not applicable.
6. **Contractual:** The primary expense in this category is to contract with an independent evaluator who will assess how well BCS is meeting the project's stated objectives. Funding will also be used for a Waldorf-certified consultant to provide forty (40) hours of mentoring each year to the teachers in the professional development program. Monies are also requested for the BPG to participate in the Foraker Group Volunteer Management program to help facilitate effective means of volunteer engagement. Year One cost for category 6 is \$18,098 and for Year Two is \$16,688.
7. **Construction:** Not applicable.
8. **Other:** Tuition for the Waldorf certification program is the highest category of expenditure, as the professional development of BCS staff is most directly linked to positive student outcome. Monies requested will pay all tuition costs for the completion of the Waldorf certification for all full-time teachers on staff. This will allow BCS to remain in compliance with the charter. Tuition costs of \$132,318 in Year One and \$81,258 in Year Two have been allocated for category 8 expenditures.
9. **Total Direct Costs:** Total direct costs for Year One are \$190,761 and total costs for Year Two are \$131,591.
10. **Indirect Costs:** Not applicable.
11. **Training Stipends:** Not applicable.
12. **Total Costs:** In order to fully realize our development effort and foster the success of Birchtree Charter School, we are requesting a total of \$322,352, to be allocated over two years. Total costs for Year One are \$190,761 and total costs for Year Two are \$131,591.

**Birchtree Charter School: USDOE CSP Planning and Implementation Project Budget Detail**

Budget Category	Description of Expenditures	Grant Funds		
		Year One	Year Two	Total
<b>1. Personnel</b>	Not applicable	--	--	--
	<b>Total Personnel</b>	--	--	--
<b>2. Fringe Benefits</b>	Not applicable	--	--	--
	<b>Total Fringe Benefits</b>	--	--	--
<b>3. Travel</b>	Waldorf Summer Intensive	35,495	30,945	66,440
	Project Director's Meeting	2,700	2,700	5,400
	<b>Total Travel</b>	<b>38,195</b>	<b>33,645</b>	<b>71,840</b>
<b>4. Equipment</b>	Computer	1,350	--	#VALUE!
	Database Development Software	800	--	#VALUE!
	<b>Total Equipment</b>	<b>2,150</b>	--	<b>#VALUE!</b>
<b>5. Supplies</b>	Not applicable	--	--	--
	<b>Total Supplies</b>	--	--	--
<b>6. Contractual</b>	Independent evaluator	15,000	15,000	30,000
	Mentoring	1,598	1,688	3,286
	Volunteer Management Training	1,500	--	
	<b>Total Contractual</b>	<b>18,098</b>	<b>16,688</b>	<b>34,786</b>
<b>7. Construction</b>	Not applicable	--	--	--
	<b>Total Construction</b>	--	--	--
<b>8. Other</b>	Waldorf Certification Program			
	Tuition	132,318	81,258	213,576
	<b>Total Other</b>	<b>132,318</b>	<b>81,258</b>	<b>213,576</b>
<b>9. Total Direct Costs</b>		<b>190,761</b>	<b>131,591</b>	<b>322,352</b>
<b>10. Indirect Costs</b>	Not applicable	--	--	--
	<b>Total Indirect Costs</b>	--	--	--
<b>11. Training Stipends</b>	Not applicable	--	--	--
	<b>Total Training Stipends</b>	--	--	--
<b>12. Total Costs</b>		<b>190,761</b>	<b>131,591</b>	<b>322,352</b>



# Survey on Ensuring Equal Opportunity For Applicants

OMB No. 1890-0014 Exp. 2/28/2009

## Purpose:

The Federal government is committed to ensuring that all qualified applicants, small or large, non-religious or faith-based, have an equal opportunity to compete for Federal funding. In order for us to better understand the population of applicants for Federal funds, we are asking nonprofit private organizations (not including private universities) to fill out this survey.

Upon receipt, the survey will be separated from the application. Information provided on the survey will not be considered in any way in making funding decisions and will not be included in the Federal grants database. While your help in this data collection process is greatly appreciated, completion of this survey is voluntary.

## Instructions for Submitting the Survey

If you are applying using a hard copy application, please place the completed survey in an envelope labeled "Applicant Survey." Seal the envelope and include it along with your application package. If you are applying electronically, please submit this survey along with your application.

<b>Applicant's (Organization) Name:</b>	Birchtree Parents Guild, Inc.
<b>Applicant's DUNS Name:</b>	8376990030000
<b>Federal Program:</b>	Office of Innovation and Improvement (OII): Charter Schools Program (CSP): Planning
<b>CFDA Number:</b>	84.282

1. Has the applicant ever received a grant or contract from the Federal government?

Yes  No

2. Is the applicant a faith-based organization?

Yes  No

3. Is the applicant a secular organization?

Yes  No

4. Does the applicant have 501(c)(3) status?

Yes  No

5. Is the applicant a local affiliate of a national organization?

Yes  No

6. How many full-time equivalent employees does the applicant have? (Check only one box).

3 or Fewer  15-50

4-5  51-100

6-14  over 100

7. What is the size of the applicant's annual budget? (Check only one box.)

Less Than \$150,000

\$150,000 - \$299,999

\$300,000 - \$499,999

\$500,000 - \$999,999

\$1,000,000 - \$4,999,999

\$5,000,000 or more

# Survey Instructions on Ensuring Equal Opportunity for Applicants

OMB No. 1890-0014 Exp. 2/28/2009

**Provide the applicant's (organization) name and DUNS number and the grant name and CFDA number.**

1. Self-explanatory.
2. Self-identify.
3. Self-identify.
4. 501(c)(3) status is a legal designation provided on application to the Internal Revenue Service by eligible organizations. Some grant programs may require nonprofit applicants to have 501(c)(3) status. Other grant programs do not.
5. Self-explanatory.
6. For example, two part-time employees who each work half-time equal one full-time equivalent employee. If the applicant is a local affiliate of a national organization, the responses to survey questions 2 and 3 should reflect the staff and budget size of the local affiliate.
7. Annual budget means the amount of money your organization spends each year on all of its activities.

## **Paperwork Burden Statement**

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 **1890-0014**. The time required

to complete this information collection is estimated to average five (5) minutes 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:** The Agency Contact listed in this grant application package.