

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



APPLICATION FOR GRANTS
UNDER THE

CSP Non-SEA Planning, Program Design, and Implementation (84.282B)

CFDA # 84.282B

PR/Award # U282B130037

Grants.gov Tracking#: GRANT11448662

OMB No. 1894-0006, Expiration Date: 09/30/2014

Closing Date: Jul 12, 2013

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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="07/11/2013"/>	4. Applicant Identifier: <input type="text"/>	
5a. Federal Entity Identifier: <input type="text"/>	5b. Federal Award Identifier: <input type="text"/>	
State Use Only:		
6. Date Received by State: <input type="text"/>	7. State Application Identifier: <input type="text"/>	
8. APPLICANT INFORMATION:		
* a. Legal Name: <input type="text" value="Intrinsic Schools"/>		
* b. Employer/Taxpayer Identification Number (EIN/TIN): <input type="text" value="45-5454261"/>	* c. Organizational DUNS: <input type="text" value="0788722450000"/>	
d. Address:		
* Street1:	<input type="text" value="4517 N. Artesian Ave"/>	
Street2:	<input type="text"/>	
* City:	<input type="text" value="Chicago"/>	
County/Parish:	<input type="text"/>	
* State:	<input type="text" value="IL: Illinois"/>	
Province:	<input type="text"/>	
* Country:	<input type="text" value="USA: UNITED STATES"/>	
* Zip / Postal Code:	<input type="text" value="60625-3003"/>	
e. Organizational Unit:		
Department Name: <input type="text"/>	Division Name: <input type="text"/>	
f. Name and contact information of person to be contacted on matters involving this application:		
Prefix: <input type="text"/>	* First Name:	<input type="text" value="Melissa"/>
Middle Name: <input type="text"/>		
* Last Name:	<input type="text" value="Zaikos"/>	
Suffix: <input type="text"/>		
Title:	<input type="text" value="CEO"/>	
Organizational Affiliation: <input type="text"/>		
* Telephone Number: <input type="text" value="312-384-9903"/>	Fax Number: <input type="text"/>	
* Email: <input type="text" value="mzaikos@intrinsicschools.org"/>		

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-061113-001

* Title:

Office of Innovation and Improvement (OII): Charter Schools Program Non-State Educational Agencies (Non-SEA) Planning, Program Design, And Initial Implementation Grant CFDA Number 84.282B

13. Competition Identification Number:

84-282B2013-2

Title:

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

Add Attachment

Delete Attachment

View Attachment

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

Intrinsic Schools Planning, Program Design, and Initial Implementation Grant

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.

Add Attachment

Delete Attachment

View Attachment

17. Proposed Project:

* a. Start Date:

* b. End Date:

18. Estimated Funding (\$):

* a. Federal	<input type="text" value="199,760.00"/>
* 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="199,760.00"/>

*** 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

Add Attachment

Delete Attachment

View Attachment

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:

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.
19. Will comply with the requirements of Section 106(g) of the Trafficking Victims Protection Act (TVPA) of 2000, as amended (22 U.S.C. 7104) which prohibits grant award recipients or a sub-recipient from (1) Engaging in severe forms of trafficking in persons during the period of time that the award is in effect (2) Procuring a commercial sex act during the period of time that the award is in effect or (3) Using forced labor in the performance of the award or subawards under the award.

<p>* SIGNATURE OF AUTHORIZED CERTIFYING OFFICIAL</p> <p>Matthew Shaw</p>	<p>* TITLE</p> <p>Consultant</p>
<p>* APPLICANT ORGANIZATION</p> <p>Intrinsic Schools</p>	<p>* DATE SUBMITTED</p> <p>07/11/2013</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

1. * Type of Federal Action: <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	2. * Status of Federal Action: <input type="checkbox"/> a. bid/offer/application <input checked="" type="checkbox"/> b. initial award <input type="checkbox"/> c. post-award	3. * Report Type: <input checked="" type="checkbox"/> a. initial filing <input type="checkbox"/> b. material change
4. Name and Address of Reporting Entity: <input checked="" type="checkbox"/> Prime <input type="checkbox"/> SubAwardee * Name: Intrinsic Schools * Street 1: 4517 N. Artesian Ave Street 2: * City: Chicago State: IL: Illinois Zip: 60625 Congressional District, if known: IL-005		
5. If Reporting Entity in No.4 is Subawardee, Enter Name and Address of Prime:		
6. * Federal Department/Agency: U.S. Department of Education	7. * Federal Program Name/Description: Charter Schools CFDA Number, if applicable: 84.282	
8. Federal Action Number, if known:	9. Award Amount, if known: \$	
10. a. Name and Address of Lobbying Registrant: Prefix: * First Name: Not Applicable Middle Name: * Last Name: Not Applicable Suffix: * Street 1: Not Applicable Street 2: * City: Not Applicable State: Zip:		
b. Individual Performing Services (including address if different from No. 10a) Prefix: * First Name: Not Applicable Middle Name: * Last Name: Not Applicable Suffix: * Street 1: Not Applicable Street 2: * City: Not Applicable 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: Matthew Shaw * Name: Prefix: * First Name: Matthew Middle Name: * Last Name: Shaw Suffix: Title: Consultant Telephone No.: 773-680-0446 Date: 07/11/2013		
Federal Use Only:		Authorized for Local Reproduction Standard Form - LLL (Rev. 7-97)

PR/Award # U282B130037

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. Public reporting burden for this collection of information is estimated to average 1.5 hours 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. The obligation to respond to this collection is required to obtain or retain benefit (Public Law 103-382). Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the U.S. Department of Education, 400 Maryland Ave., SW, Washington, DC 20210-4537 or email ICDocketMgr@ed.gov and reference the OMB Control Number 1894-0005.

Optional - You may attach 1 file to this page.

Intrinsic Schools - GEPA.pdf

Add Attachment

Delete Attachment

View Attachment

Intrinsic Schools
General Education Provisions Act Statement

Intrinsic Schools ensures equitable access to, and participation in our program for students and teachers and other program beneficiaries regardless of gender, race, national origin, color, disability, or age through the following measures:

- We actively recruit minority students and students with disabilities
- We actively recruit teachers and other staff who are members of underrepresented groups such as minorities and women.
- All of our recruitment and orientation materials are translated into Spanish and will be translated into other languages on an as needed basis
- We will meet the needs of student with disabilities through necessary accommodations and provide them with instruction in the least restrictive environment

As a result of these efforts our student body is 21% African-American, 62% Latino, 8% Caucasian, and 4% Asian/Pacific Islander. Additionally, 50% of our staff are ethnic minorities and 44% are women.

CERTIFICATION REGARDING LOBBYING

Certification for Contracts, Grants, Loans, and Cooperative Agreements

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

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

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

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

Statement for Loan Guarantees and Loan Insurance

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

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

* APPLICANT'S ORGANIZATION Intrinsic Schools	
* PRINTED NAME AND TITLE OF AUTHORIZED REPRESENTATIVE	
Prefix: <input type="text"/>	* First Name: <input type="text" value="Matthew"/> Middle Name: <input type="text"/>
* Last Name: <input type="text" value="Shaw"/>	Suffix: <input type="text"/>
* Title: <input type="text" value="Consultant"/>	
* SIGNATURE: <input type="text" value="Matthew Shaw"/>	* DATE: <input type="text" value="07/11/2013"/>

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.]

You may now Close the Form

You have attached 1 file to this page, no more files may be added. To add a different file, you must first delete the existing file.

* Attachment:

Intrinsic Schools Abstract Narrative
Non-SEA Planning, Program Design, and Implementation Grant 84.282B

Intrinsic Schools
17 N. State Street, Chicago, IL 60602
Melissa Zaikos, Project Director
(312) 384-9903, mzaikos@intrinsicsschools.org

Intrinsic Schools will open in fall 2013 with 186 9th grade students and grow to serve 911 students in grades 7-12 at capacity. The mission of Intrinsic Schools is to prepare all students for 21st century post-secondary success and to cultivate independent, intellectually curious learners. To achieve this, we will create a new model that leverages technology to personalize learning and is informed by the experience of great teachers.

At Intrinsic Schools, students will have opportunities to navigate their own learning and find their passions through purposefully designed curricular experiences, which we believe are critical for post-secondary success. Our school model includes three innovative features: personalized learning, student autonomy, and technology-enabled instruction. The Intrinsic culture will be characterized by a focus on mastery, autonomy, and community.

We will closely measure both academic growth and attainment. We have created measures that track “catch up” growth so we can know if students are on the path toward preparation for rigorous colleges. In addition to excellent performance on standardized tests, we expect all students to demonstrate empathy, perseverance, independence and curiosity.

Intrinsic Schools is committed to collaborating with both district and charter schools. We will share all tools, curriculum and processes developed as part of our model with others at no cost. Our intent is both to provide an example of success and support colleagues to catalyze change beyond our own school.

Project Narrative File(s)

* **Mandatory Project Narrative File Filename:**

[Add Mandatory Project Narrative File](#)

[Delete Mandatory Project Narrative File](#)

[View Mandatory Project Narrative File](#)

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

[Add Optional Project Narrative File](#)

[Delete Optional Project Narrative File](#)

[View Optional Project Narrative File](#)

Intrinsic Schools

Planning, Program Design and Implementation Project Narrative

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I Absolute Priority

Absolute Priority:

Improving Achievement and High School Graduation Rates. Accelerating learning and helping to improve high school graduation rates and college enrollment rates in high-poverty schools.

The mission of Intrinsic Schools is to prepare all students for 21st century post-secondary success and to cultivate independent, intellectually curious learners. To achieve this, we will create a new model that leverages technology to personalize learning and is informed by the experience of great teachers.

In our experience, we have seen dramatic improvement in student achievement when students are taught to set and monitor academic goals. Based on this experience, each student at Intrinsic Schools will have a personalized learning plan that outlines an individualized path toward post-secondary success. Students will be asked to set goals that ensure post-secondary readiness and will be coached to adjust them upward based on specific academic and career aspirations. Each student's personalized learning plan will track data and guide their progress toward high school graduation, college acceptance and success.

In addition, we will closely measure both academic growth and attainment. We have created measures that track "catch up" growth so we can know if students are on the path toward success in rigorous colleges. In addition to excellent performance on standardized tests, we expect all students to demonstrate empathy, perseverance, independence, and intellectual curiosity.

Additional information related to improving achievement and high school graduation rates can be found in the response to Selection Criteria (1) and (3).

II Competitive Preference Priorities

Competitive Preference Priority 1--Improving Achievement and High School Graduation Rates
[Rural Students, Students with Disabilities, and English Learners] (up to 4 points).

At Intrinsic Schools, we are committed to empowering all students to reach their fullest potential, including students receiving special education services, classified as English Language Learners (ELL), and/or who may be in high-risk situations including but not limited to homelessness, low achievement, poverty, behavioral issues, truancy, drugs, pregnancy, and emotional issues.

We anticipate serving a student population that reflects the Chicago Public Schools (CPS) average of 12.9% students with disabilities. As we welcome our first class of high school students, we are working closely with our families and feeder schools to review the details of IEPs for incoming students and allocate appropriate resources to meet their individual needs. We expect to receive IEPs that indicate a variety of educational settings (e.g., separate class, co-taught setting, general education setting with supports). Technology will be used as a tool to provide some accommodations, modifications, and differentiation as indicated in students' IEPs and in general for all students as a regular part of the learning experience. We will seek support from the district and its related service providers in order to best serve the needs of our students and adhere to the provisions outlined in each child's IEP.

We believe every student should receive support based on his or her specific and individual need, not label. Technology will enable us to collect data, deliver “just-in-time” instruction, and continue to close any learning gaps needed to meet or exceed rigorous state and national grade-level standards. Through technology, our teachers will be able to create and curate content and deliver multi-modal, scaffolded lessons to meet the diverse needs of our

students. Research-based, teacher-led instructional practices will be infused throughout the student's daily experience. This hybrid approach of leveraging technology with the highest quality pedagogy will provide students with full access to a variety learning experiences.

Real time data will be available to students, their families, and staff. Weekly goal-setting in response to performance data and teacher feedback will be a common practice for students across content areas and grade levels. Teams of teachers will monitor IEPs and personalized learning plans to inform instruction and to determine interventions that yield the best results for each student. Our weekly schedule and school calendar is also organized to provide students will extra support throughout various times during year. If needed, we will work with CPS to provide extended school year services to students who may require them. We will also systematically and consistently communicate and engage our families and provide them with the information and tools necessary to support their children's needs, goals, and progress.

The curriculum coordinator and/or principal will be the lead administrator, who will be overseeing communication with families, the school's RtI Plan, appropriate and effective specialized support services, and IDEA compliance. Though there will be a team lead, we will maintain an unwavering commitment to a collective responsibility for the growth of all of our students. Our pod structure allows for continuous collaboration among teachers to provide the most targeted support to optimally meet individual student needs. Our staff, including special education teachers, content-specific teachers, instructors, assistant teachers, curriculum coordinator, and principal, will meet weekly to analyze general trends and devise plans to address the needs of individual students. Some of the topics that will be discussed at these meetings may include, but are not limited to:

- Instructional resources to support student needs
- Research-based instructional strategies that best support students with disabilities

- Family outreach and/or student socio-emotional support
- Student data (including writing samples and other assessment data)
- Student goal-setting sheets and any adjustments that may be required
- Co-teaching best practices
- Effectiveness of LRE

When necessary, we will convene additional meetings to discuss how to best support struggling students. Policies and procedures that comply with state regulations are defined regarding the use of RtI to determine special education eligibility (based on students' educational needs). In the case, when the student performs both below the *level* evidenced by peers and shows a learning *rate* substantially below that of peers **and** the provision of special education must result in improved growth, a student may be referred to determine eligibility for specialized services. Families will be informed of their right to request a special education evaluation at any time during the RtI process and are involved in decision-making. Workshops will be provided to parents informing them of their procedural rights and safeguards and the IEP process in the student's first year of special education eligibility. The team will continue to review data and use information to make decisions regarding LRE and appropriateness of special education services.

As stated in our mission and vision, our goal is to prepare all Intrinsic students for 21st century post-secondary success. Our focus is not simply on high school graduation but success to and through college. We will have designated staff knowledgeable in finding the most appropriately matched college for students with disabilities. We will engage in transitional planning to ensure that accommodations are implemented at the college level as well. All in all, we will measure our success in serving students with disabilities on the following criteria: 1) Individual growth, 2) Growth compared to similar populations, 3) LRE Movement, 4) Progress

toward IEP goals (academic, behavioral, and/or socio-emotional), 5) Curriculum-based assessments and other progress monitoring data, 6) Student surveys, parents comments, and teacher observations.

Competitive Preference Priority 2--Promoting Diversity (up to 2 points).

Projects that are designed to promote student diversity, including racial and ethnic diversity, or avoid racial isolation.

At Intrinsic Schools, we believe that a diverse student body will enhance the educational experiences of all students. Our aim is to mirror the Chicago Public Schools (CPS) citywide demographics to the extent possible. The CPS student racial breakdown is 42% African-American, 44% Latino, 9% Caucasian, and 3% Asian/Pacific Islander. We have been intentional in our recruitment efforts to ensure that we are reaching racially and ethnically diverse audiences and made presentations to 8th grade students at 25 elementary schools serving diverse student populations. Although the Intrinsic Schools permanent facility is located on Chicago's Northwest Side, a primarily Latino neighborhood, we have been successful in recruiting an ethnically diverse student body for our inaugural class. The racial and ethnic composition of our enrolled students is 21% African-American, 62% Latino, 8% Caucasian, and 4% Asian/Pacific Islander. As we grow to our full 7th-12th grade compliment, we will continue to recruit students from a wide variety of neighborhoods to further diversify the student body. All Intrinsic Schools staff will receive professional development related to promoting diversity and inclusion.

Competitive Preference Priority 3--Support for Military Families (up to 3 points).

Not Applicable.

III Application Requirements

(a) Describe the educational program;

Please see Selection Criteria (1) for answers to this section

(b) Describe how the charter school will be managed;

Please see Selection Criteria (6) for answers to this section.

(c) 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 Selection Criteria (3) for answers to this section.

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

Please see Selection Criteria (7) and (8) for answers to this question.

(e) 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 Selection Criteria (4) for answers to this section.

(f) Describe how the authorized public chartering agency will provide for continued operation of the charter school once the Federal grant has expired,

The items requested in our budget are for start-up and implementation expenses related to opening the charter school. As we grow to full enrollment, the school will become financially

sustainable on recurring public revenue which includes a per pupil allocation, an independent facility supplement, state and federal poverty related funds, and special education funding.

(g) If the charter school desires the Secretary to consider waivers under the authority of the CSP, include a request and justification.

Intrinsic Schools is not requesting any waivers.

(h) Describe how the grant funds will be used, including a description of how these funds will be used in conjunction with other Federal programs administered by the Secretary;

Please refer to the budget narrative for this response.

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

Intrinsic Schools is a public charter school that will serve students in Chicago, Illinois. Consistent with state law, enrollment in Intrinsic Schools is open to any student who lives in Chicago without regard to disability, race, creed, color, gender, national origin, religion, ancestry, marital status, or need for special education services. If there are more applicants than spaces available, Intrinsic Schools will hold a computerized, random lottery.

Parents and students are informed about Intrinsic Schools through a wide variety of outreach efforts. For example, our recruitment activities for our first class of 180 9th grade students included:

- Presentations to 8th grade students at approximately 25 elementary schools
- Three community open house sessions
- Information sessions for 8th grade counselors

- Creation of a video regarding the school’s mission and design in English and Spanish
- Delivery of applications to over 40 elementary schools
- A booth at the Chicago New Schools Expo.

Additional information regarding this response can be found in Selection Criteria (4).

(j) 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 (IDEA)

Intrinsic Schools will fully comply with the State Law and our Local Education Agency’s mandates pertaining to section 613(a)(5) and 613(e)(1)(B) of the Individuals with Disabilities Education Act. Intrinsic Schools will meet all state and LEA requirements regarding the treatment and education of disabled students. As a charter school, Intrinsic Schools is required to make its services available to all students, regardless of achievement or ability. We will provide fair and equitable supplementary services to all disabled students. We will work closely with the LEA to ensure that all required accommodations are provided to students with disabilities and will either receive dedicated funding or in-kind services from the LEA for the provision of these accommodations.

(k) If the eligible applicant desires to use grant funds for dissemination activities under section 5202(c)(2)(c) of the ESEA (20 U.S.C 7221a(c)(2)(C)), describe those activities and how those activities will involve charter schools and other public schools, LEAs, developers, and potential developers.

Not applicable.

IV Selection Criteria

(1) Quality of the proposed curriculum and instructional practices (20 U.S.C. 7221c(b)(1))
(up to 15 points).

Intrinsic Schools will open in Fall 2013 with 186 9th grade students and grow over the course of the next four years to serve 911 students in grades 7-12.

The curriculum, instruction, and assessment at Intrinsic Schools has been meticulously aligned to the Illinois Learning Standards, Common Core State Standards for English Language Arts & Mathematics, Next Generation Science Standards, and the College Readiness Standards. The proposed scope and sequence, which outlines the order in which content and skills will be delivered, has been intentionally designed to integrate and reinforce concepts across disciplines and grade levels. Through technology-enabled data collection, our teachers will routinely assess the effectiveness and implementation integrity of the core curriculum areas.

Our school model is based on the belief that it is time to rethink and redesign the learning environment to reflect the 21st century. Thus our school will look very different from traditional schools. We have designed a schedule that allows for fluid movement to adapt to the diverse and ongoing needs of our students. Our proposed schedule is largely comprised of two extended periods – one humanities and one STEM – that enables each student to combine a different set of learning experiences to meet their particular needs and interests. During each flexible period, two teachers and an assistant teacher (with additional support from specialized services staff) are responsible for a pod of 9-12 students. The students in a pod will be engaged in a variety of activities ranging from individualized, on-line instruction, small group instruction led by a teacher, collaborative problem solving with smaller and larger peer groups, and Socratic seminars. The mix and balance of activities can be personalized for each student based on

his/her learning profile. At various points during the day, depending on student need and formative data, students can be grouped either heterogeneously or by skill level.

Curriculum

Master Teachers will collaborate with the Curriculum Coordinator to develop the majority of the curriculum by integrating pieces from the proven curriculum described below including both core and supplemental components with lessons, activities and projects that they have created and used successfully in the past. The Universal Design for Learning (UDL) will guide the design of the curriculum, instruction, and assessment at Intrinsic Schools. Student data will inform adjustments to future learning experiences. UDL allows teachers to create a flexible learning environment in which students become more actively involved in their learning and progress. Through technology, students will be able to track their own progress. They will become more aware of their metacognitive processes and become co-designers in personalized learning paths.

Our team has utilized various research-based curricular materials and technologies that have yielded positive outcomes for students of diverse backgrounds. The table below lists the core and supplemental programs that we have identified to build the base of our curriculum.

	Core	Supplemental
Humanities	Facing History & Ourselves	eSpark – digital
(English and	Novels	ThinkCerca – digital
Social	Primary Source Documents	Model UN
Studies)	AP Courses	
STEM	Connected Math Project	ST Math® – digital
(Math and	Interactive Math Program	eSpark – digital
Science)	Gateway to Technology	Khan Academy – digital
	Program	MathCounts
		Chicago Citywide Math Leagues
	AP Courses	American Math Competition
Foreign	Middlebury Interactive	
Language		

Facing History and Ourselves will partner with Intrinsic Schools to provide our educators with resources and professional development for teaching Humanities. Core content focuses on human behavior and how such behavior can be used to understand events in history. The Facing History and Ourselves model has proven to be successful in improving students’ academic performance by increasing their historical understanding and fostering tolerance and positive civic participation.¹

¹ "Facing History and Ourselves National Evaluation Study: Outcomes and Implications"
http://www.facinghistory.org/sites/facinghistory.org/files/National_Evaluation_Study_of_Facing_History_and_Ourselves_Outcomes_and_Implications.pdf

eSpark uses iPads to help develop individualized learning paths (“playlists”) for students. eSpark uses NWEA data to pinpoint their unique learning strengths and areas for development. Both assessment data and survey data (from student, teacher, and parent) data is used in customizing an individualized learning plan. Progress can be seen in real time on their dashboard, which reports student growth across apps. Effectiveness studies have shown that with eSpark, Illinois students see dramatic gains of 3.5 times more growth.²

The **Connected Mathematics Project** (CMP) is a research-based mathematics curriculum for middle school teachers and students and was field-tested in diverse sites across the country with approximately 45,000 students and 390 teachers. Evaluation reports indicate that CMP outperforms non-CMP curricula on tests of problem-solving ability, equals or outperforms non-CMP curricula on skills tests, and promotes long-term retention. As a whole, the CMP2 curriculum covers all of the grades 6–8 Common Core State Standards.³

The **Interactive Mathematics Program** (IMP) is a comprehensive program of problem-based mathematics that integrates traditional material, such as algebra, geometry, and trigonometry, including coverage of statistics and probability. The IMP four-year core curriculum meets college entrance requirements and prepares students to use problem-solving skills in higher education and on the job. The IMP first edition was published after more than 10 years of research, pilot testing, evaluating, field-testing, revising, and reviewing. In a study of three high schools, a statistically significant, higher percentage of IMP students completed at least three years of college-preparatory mathematics, and a statistically significant, higher percentage continued their studies in advanced courses in mathematics (including mathematical

² eSpark. <http://esparklearning.com/effectiveness#study3>

³ CMP Literature Review 2012. <http://connectedmath.msu.edu/rne/lit.shtml>

analysis, trigonometry and analytic geometry, pre-calculus, and calculus). This finding was true for all ethnic groups and female and male students at each of the three schools in the study.⁴

ST Math® is a secondary intervention program designed for middle or high school students who are often multiple grade levels behind in math proficiency. It is an integrated math program that helps students master the essential building blocks for math success from a basic level of math facts up through introductory algebraic equations.⁵

ThinkCERCA is platform is designed to provide critical thinking and literacy instruction to students through a computer or tablet. The lessons are engaging to stimulate real-world interactions and so students have fun learning how to think critically. ThinkCERCA lessons are tied to the Common Core State Standards and provide teachers and administrators the ability to view real-time data about student performance and collective school performance on the standards. ThinkCERCA will also provide a common writing rubric for persuasive writing that will be used across all disciplines.

Middlebury Interactive Languages will provide on-line instruction for Intrinsic School students in both Spanish and Mandarin. The courses are grounded in the development and integration of the four key language skills: listening, speaking, reading and writing. Students are introduced to vocabulary themes, grammar concepts, sentence structure and culture through explicit instruction, guided learning and adaptive pacing. Opportunities to apply language in common situations along with highly interactive activities are designed to reinforce skills in differing contexts and build foundational language knowledge. The use of authentic materials helps build student confidence and comfort in the target language.

⁴ Research Supporting the Interactive Mathematics Program.

<http://www.mathimp.org/downloads/IMPWhitePaper.pdf>

⁵ MIND Research Institute. http://www.mindresearch.net/cont/research/landing_research.php

Project Lead The Way's (PLTW's) **Gateway to Technology** (GTT) program for middle schools sets high standards for rigorous, focused and engaging study, developing students' innovative, collaborative, critical-thinking and problem-solving skills. More than 400,000 students in more than 4,200 schools in all 50 states and the District of Columbia are taking PLTW STEM education courses during the 2011-12 academic year. Since 2004, PLTW has used an independent service to conduct follow-up student testing and measure the programs' impact:

- PLTW alumni are 5 to 10 times more likely to pursue engineering and technology classes than other first-year college students and on average, PLTW alumni have a GPA 0.21 points higher than the average GPA of all first-year college students.
- PLTW students outscored a random sample of other career/technical students by 10 points in reading, 11 points in mathematics, and 10 points in science.
- 79 percent of PLTW graduates completed four years of college-preparatory mathematics and 63 percent completed four years of college-preparatory science.⁶

Intrinsic will offer a significant number of Advanced Placement courses to further prepare students for entering college. These courses will be offered through both on-line and traditional instruction and include: AP English Literature and Composition, AP English Language and Composition, AP Human Geography, AP US History, AP European History, AP World History, AP US Government & Politics AP Computer Science, AP Psychology, AP Statistics, AP Calculus, AP Biology, AP Chemistry, and AP Physics.

⁶ PLTW Outcomes. <http://www.pltw.org/educators-administrators/outcomes>

Instructional Practices

According to Richard Elmore, the way to improve student learning at scale is to simultaneously improve the three domains within the Instructional Core – the interdependent relationship between the student, the teacher, and the content.⁷ The Intrinsic Schools teaching team possesses both the experience and expertise in delivering a rigorous curriculum through proven and effective instructional strategies. They will create and curate rich learning experiences that will help all students achieve high levels of academic success. We will leverage technology to increase rigor, tailor instruction, and engage students with meaningful learning activities. Elmore also maintains “task predicts performance.” Thus, we will ensure that all students will have the opportunity to grapple with challenging tasks to improve their critical thinking and problem-solving skills.⁸

Intrinsic Schools was designed in order to meet the needs of all students. We will aggressively work to assess student needs, remediate skill deficiencies and meet the needs of accelerated students. Differentiating regular classroom instruction is critical to the success of the Intrinsic Schools model. As outlined by Carol Tomlinson⁹, instruction should be tailored in terms of content, process, product, and learning environment to improve student performance. However, this a challenging task for even the most talented and well-meaning teacher.

Intrinsic Schools will rely heavily on technology to support differentiation in many ways including:

- Varying student to teacher ratios so that students receive small group attention as needed and so that the most effective teachers are impacting the most students

⁷ "Improving The Instructional Core." <http://www.acsa.org/MainMenuCategories/ProfessionalLearning/LeadershipCoaching/Coach-Resources/Imp-Instr-Core.aspx>

⁸ Diane Briars. "Tools and Strategies for Considering Instructional Materials for Implementing the CCSS." http://www.lsri.uic.edu/ccss/ccss_bo_briars.pdf

⁹ <http://www.caroltomlinson.com/>

- Varying pacing based on student profile
- Building background knowledge and strengthening foundational skills
- Allowing students to receive instruction through their preferred modalities
- Offering choice and access to information on virtually all topics
- Increasing peer to peer collaboration
- Increasing rigor through content creation and enabling students to share instructional strategies with peers (Bloom’s Taxonomy: Application, Analysis, Synthesis)
- Allowing students to accelerate and take specialized, online courses and/or student-created independent studies

We believe that combining technology with proven instructional practices and experienced teachers will make the learning experience better and more relevant for students and our model more efficient. Our model is based on the assumption that the best people to determine how to integrate technology into instruction are the best teachers in the country. By staffing each school with a master teacher in each content area, we mitigate risks associated with the start-up year of a new school and create a built-in professional development system where master teachers teach alongside and mentor new teachers as they are hired.

Learner Driven

We believe that with the right supports and coaching all Intrinsic School students can and should define much of their learning experience. But this requires a level of self-awareness and reflection that must be purposefully managed. At Intrinsic Schools, we will help students gradually take more control over their learning. Students will “earn” more decision-making rights as they demonstrate their ability to manage different levels of independence as learner.

Our most autonomous students will be able to move freely around our building in a manner not unlike college students. To support this important transition, we will provide the following structures:

- Intentional instruction around expected student behaviors and cultural norms during new student orientation and weekly grade-level meetings
- Weekly goal setting and reflection
- Frequent feedback and data that enables students to manage progress toward their goals
- Quarterly student reflection on digital portfolio and student-led conferences twice a year
- Structures for teachers to review and respond to student needs as evidenced by data
- Technology-enabled communication between teachers and students and teachers and parents.

A focus on mastery is critical for a learner driven model. If students are to have role in guiding their instruction they need to be clear about what they are expected to know and be able to do. If a student does not reach mastery initially, that student will receive focused support to ensure mastery before moving on. We want our students to view learning as an iterative process where failure is often the first step toward procedural fluency, conceptual understanding, and high quality final products.

Technology-Enabled

We will use technology to strengthen foundational skills, deepen learning and enable student autonomy. Our experience has taught us that the best way to accelerate student achievement is to provide students a combination of learning experiences – some of which are in groups of mixed ability peers and some that are tailored to a student’s specific instructional

readiness. Adaptive technology programs allow students to spend time working at their exact instructional level for a portion of the day. Technology is also a powerful tool for deepening learning. It not only provides access to endless information on any topic a student might want to pursue in depth but also allows students to collaborate with others (both peer and experts locally and around the globe). Technology will be used to support student creation. In addition it provides operational efficiencies around communication and data that provide structure needed for students to be more independent.

Changing Roles in an Innovative Environment

From our visits to high performing innovative schools across the country, we have learned that designing individual paths for students can be complex and pushes students and adults to rethink their roles. Teachers are required to be flexible and serve as guides, mentors, experts, facilitators, and also learners. Students become increasingly responsible for setting goals and reflecting on their progress. Technology provides the structures for data, collaboration and goal-setting in addition to providing some instruction.

(2) The extent to which the proposed project will assist educationally disadvantaged students in meeting State academic content standards and State student academic achievement standards (20U.S.C. 7221c(a)(1)) (up to 3 points).

Intrinsic Schools will serve a predominantly educationally disadvantaged population as we anticipate that between 80-90% of students will qualify for free and reduced price lunch. The Chicago Public Schools district-wide average is 87% qualifying for free and reduced price lunch. As such, the curriculum and instructional practices described above in Selection Criteria (1) as well as the assessment plan described below in Selection Criteria (3) provide detailed

explanations of how Intrinsic Schools will assist educationally disadvantaged students in meeting State academic content and achievement standards.

(3) The quality of the strategy for assessing achievement of the charter school's objectives (20 U.S.C.7221c(a)(4)) (up to 15 points).

The mission of Intrinsic Schools is to prepare all students for 21st century post-secondary success and to cultivate independent, intellectually curious learners. To achieve this, we will create a new model that leverages technology to personalize learning and is informed by the experience of great teachers. To measure our success in meeting this objective, we have developed a set of educational and operational metrics as described below.

Educational Goals and Metrics

Our educational goals and metrics are reported using a balanced scorecard to provide a diverse perspective on student achievement. We will rigorously measure academic growth, academic attainment, participation, and habits of minds.

Academic Growth

Individual student growth is the focus of our educational goals and metrics. We measure this using the Northwest Evaluation Association Measures of Academic Progress (NWEA) assessment in middle grades and the EXPLORE, PLAN, ACT System (EPAS) in high school. We will measure ourselves based on the percent of students making typical growth. Our annual growth targets were set to be equal to the highest performing non-selective CPS schools in located in similar neighborhoods.

However, achieving the average growth of typical peers does not ensure preparedness for post-secondary success if a student comes to us below grade level. Thus, we will also measure the percent of students making growth necessary to reach the NWEA 50th percentile by 8th grade, which we define as “catch-up growth.” We believe we can meet a very aggressive target of 70% making catch up growth due to our personalized approach to instruction. In high school, we will measure students making expected gains on EPAS and also measure the percent of students making catch up growth to college readiness.

Academic Growth Measures				
Benchmark	Measure	Grade Level	Reviewed	Target
Typical growth	NWEA: Reading & Math	7-8	Annually	75%
“Catching-up” growth to 50 th NPR	NWEA: Reading & Math	7-8	Annually	70%
Expected gain	EXPLORE, PLAN, ACT	8-12	Annually	75%
“Catching-up” growth to college readiness	EXPLORE, PLAN, ACT	8-12	Annually	70%

Academic Attainment

Academic attainment measures are often gatekeepers to post-secondary options and thus we will monitor them closely. These students will still require “catch up growth” in high school in order to meet our benchmarks. Thus, targets for “college ready” increase from the EXPLORE to PLAN to ACT as we catch students up. We set the overall expectation for ACT at 21, which

aligns with college readiness. When reading the table below the numbers grow by 7% each year from on-track to College Readiness on the EXPLORE to on-track for College Readiness on the 12th grade ACT. The numbers represent a significantly faster rate of growth than other high performing charter high schools and we know that they are very aggressive. However, we believe that by tailoring instruction to our students' individual needs, we will be able to meet these aggressive targets.

We added two additional metrics related to ACT. First, to give our students the best chance for post-secondary options, we will have them take the ACT a second time as seniors. We will also measure the percent of students who achieve a 26 or higher. This target was set based on the 25th percentile of students being accepted to the University of Illinois at Champaign Urbana. We not only want students to be accepted, but want them to enter competitively to ensure that they will be able to succeed.

We plan to offer both Advanced Placement classes and early college courses to our juniors and seniors. Like the district, we will measure ourselves both on access to such courses and student performance. We matched the enrollment to the percentage of students that are college ready but we will allow any student interested in taking an AP class to do so regardless of PLAN or ACT score. (Early colleges course have minimum requirements set by the program.) Because we believe that communication and influencing skills are critical for post-secondary success, student writing will be assessed based on grade-specific, school-wide writing rubrics and teachers will grade one another's student writing to ensure inter-rater reliability.

We will monitor 4-year college acceptance and Bachelor's degree attainment. We also want data to follow our students during their college experience as opposed to waiting for graduation data and have added an annual retention rate. These are the best measures that we can think of currently to evaluate post-secondary success. However, we expect that university

landscape might change dramatically and that there may be new measures for attaining the skills required for profession careers. If so, these metrics might need to be adjusted. We would expect our students to do well on any new measures reflecting such changes based on their experience at Intrinsic.

Academic Attainment Measures				
Benchmark	Measure	Grade Level	Reviewed	Target
“On-track” for HS Readiness (all students)	NWEA MAP: Reading & Math	7-8	Annually	72%
Students Eligible to take Selective Enrollment Exams (all students)	ISAT Stanine (5 th)	8	Annually	75%
On-track” for college readiness (17 or higher)	EXPLORE	8	Annually	41%
On-track” for college readiness (18 or higher)	PLAN	9	Annually	48%
On-track” for college readiness (19 or higher)	PLAN	10	Annually	55%
College ready (21 or higher)	ACT	11	Annually	62%
College ready (21 or higher)	ACT	12	Annually	69%
Univ. of IL ready (26 or higher*)	ACT	12	Annually	20%
Students taking 1 or more AP or early college (EC)	AP or Early College	11-12	Annually	62%

Academic Attainment Measures

Benchmark	Measure	Grade Level	Reviewed	Target
3+ (AP) or B or better in (EC)	AP Exams	11-12	Annually	60%
Scoring Exemplary	Grade level writing rubrics	7-12	Tri-annually	80%
Graduation Rate		12	Annually	100%
4 year College Acceptance Rate		12	Annually	100%
Retention rate from 1 st year to 2 nd year in college – comparison by ethnicity		PS	Annually	(X times state avg.) ¹⁰
Bachelor's Degree Attainment (5 th year)		PS	Annually	TBD

Participation

In participation, we want to closely track and monitor student acceptance and transfers to selective enrollment schools. We believe in student choice and want students to attend his/her best fit school. If we are successful with our 7th grade students, many should qualify to take the exam and be accepted to selective enrollment schools. We also intend to offer a program that is rigorous and engaging enough to be competitive with the selective enrollment schools, thus allowing students a choice based on their preferred learning style.

¹⁰ Illinois Higher Education Board data

Participation Measures				
Benchmark	Measure	Grade Level	Reviewed	Target
Attendance Rate		7-12	Monthly	97%
Student Retention Rate ¹¹		7-12	Annually	92%
Students transferring to Selective Enrollment schools		7/8	Annually	15%

Habits of Mind

Student independence and ownership over learning is a key component in the Intrinsic Model. Thus, we will measure each student’s capacity for autonomy and perseverance over time. The Hope Survey measures student perceptions of autonomy, belongingness and goal orientations as well as their resulting engagement in learning and disposition toward achievement. The Hope Survey will be used to diagnose whether or not our school culture has the components that encourage higher levels of engagement in learning. We will also create rubrics to assess each student’s growth as a learner and measure progress across this continuum. Digital portfolios will be used for student reflection in student-led conferences with parents and teachers.

In order to self-advocate, students must clearly understand the requirements for success. We will outline detailed expectations for what every student should know about college and the

¹¹ Students transferring to competitive high school at end of 9th grade are excluded from both numerator and denominator
 Transfers due to moving out of Chicago are excluded from both numerator and denominator. Our financial model conservatively assumes number at 90% despite this target.

admissions process at every grade level and assess ourselves on whether or not students and families have the needed understanding to navigate the college process.

Because we believe so strongly in the importance of student autonomy and ownership over learning, we will continually seek additional reliable measures in this area. We are also investigating measures such as the Duckworth Grit scale developed by the University of Pennsylvania and being piloted in some KIPP schools nationally¹².

Habits of Mind Measures				
Benchmark	Measure	Grade Level	Reviewed	Target
Demonstrate age/grade-level appropriate levels of Belongingness, Autonomy, Goal Orientation	Hope Survey	All	Annually w/initial entry admin.	TBD
Demonstrate appropriate meta-cognition	Digital Portfolio Reflections	All	Bi-annually	TBD
Demonstrate grade-level appropriate college knowledge	Intrinsic Rubric, EXPLORE Career Survey	7-12	Bi-annually	100%

¹² <http://www.sas.upenn.edu/~duckwort/images/Grit%20JPSP.pdf>

Habits of Mind Measures

Benchmark	Measure	Grade Level	Reviewed	Target
Demonstrate age/grade-level appropriate autonomy for learning	Intrinsic Rubric	7-12	Bi-annually	90%

In addition to the educational goals, we will utilize the following operational goals and metrics. The Intrinsic Schools leadership team will review the operational outcomes on an ongoing basis. While certain information such as the budget variance will be tracked monthly, most of the operational goals will be measured annually. As soon as information on each goal is available, it will be reported to the school leadership and the Board of Directors. Collectively the leadership and board will utilize the reports to determine whether or not the school is operationally on track. In any area where the school fails to meet its operational goals, the leadership will prepare a corrective action plan to present to the Board of Directors for their review and approval. The Board will then monitor the school’s progress on the corrective action plan on a monthly basis or until such time that the operational goal in question is met.

Operational Goals			
Goal	Metric	Area	Target
Balanced Budget	Financial Statement	Finance	Meet
Cash Reserve	Financial Statement	Finance	30 days cash
Variance to Budget	Monthly Financial Reports	Finance	+/- 5%
Development Target	Financial Statements	Finance	
No Material Weakness in controls or compliance	Audit	Finance/ Compliance	Meet
% of Teachers Retained	Staffing Information	Staffing	80%
Teacher Net Promoter Score*	Survey	Staffing	70 %
Student Demand	# of applicants per seat	Community	2
Parent Net Promoter Score*	Survey	Community	70 %
Parent Workshop Completion	Attendance Records	Community	25%
Consortium on Chicago School Research	Survey	Community	60% Green

* Net Promoter Score® (NPS) is customer loyalty metric developed by Bain & Company. NPS asks the question, “Would you recommend us to a friend or colleague?” on a ten-point scale, and scores the percentile based on the formula [Promoters (9,10) – Detractors (0-6)].

(4) The extent of community support and parental and community involvement (20 U.S.C.7221c(b)(3); 20 U.S.C. 7221b(b)(3)(E)) (up to 8 points).

(i) The extent of community support for the application (up to 4 points); and

Community support is critical to the success of a charter school. From its inception, Intrinsic Schools was designed to be tightly integrated with the community and reflective of community needs. The extent of the communities support for our application is evidenced in many ways:

- Parents of prospective students attended multiple Chicago Board of Education meeting expressing support for our school and stating the need in Chicago for a more personalized and effective high school option during our charter application process.
- Chicago Public Schools district leadership supported our charter application. We had letters of support from five different network chiefs (principal supervisors) and two school principals. Letters expressed enthusiasm for the quality and experience of the Intrinsic team and for the need for a high quality high school option as we proposed.
- During our charter application process, we secured letters of support from leading educational and philanthropic organizations.
- During our student recruitment process, over 20 Chicago Elementary Schools allowed us to make presentations about our school to their entire 8th grade classes.
- Upon identifying the location for our school building, we worked very closely with local alderman, Ariel Reboyras. We have collaborated with the alderman on issues such as student recruitment, facility design, traffic and safety. The alderman pledged his full support of the project and has been a champion of our school to his constituents.
- Support for our school was evident through student demand. We received 650 applications for 186 openings, or 3.5 applications for every available seat.

(ii) The extent to which the proposed project encourages parental and community involvement in the planning, program design, and implementation of the charter school (up to 4 points).

Intrinsic Schools has and will continue to encourage parent and community involvement at every stage of our planning, design and implementation process. Following are examples of how we have engaged and/or will engage parents and the community at large:

- We held two blended learning pilots at a partnering Chicago Public School with over 120 students. These pilots greatly informed our curricular decisions, our strategy regarding instructional practices, selection of our student technology hardware and content, facility design, and our definition of teacher roles within the classroom.
- During the planning and program design process, we worked closely with parents to inform the academic and cultural models of our school. For example, earlier this year we held a mandatory orientation for students and parents where parents actively engaged in developing a school/parent compact and provided invaluable feedback which has shaped programmatic decisions including adding a second foreign language (we had originally planned to only offer a single foreign language option), and developing a student uniform policy.
- Before finalizing our location, we held three community meetings with roughly 50 attendees at each meeting. At these meetings we sought input on the school design, location, services, dress code and behavior policies.
- After finalizing our location we held a community forum that was sponsored by the alderman for over 100 people and sought input on both the instructional program and operational practices of the school.

- We will continue to use email and social media to survey parents and students as we make school level decisions. For example, student feedback is driving our club and sports options for the upcoming year and both students and parents will vote on the student uniform, the school mascot and school colors.
- Each year, parents will be asked to attend four separate workshops centered on topics from adolescent literacy to saving for college. These are designed to strengthen the partnership between the staff and families. Workshops will always be provided in both English and Spanish.
- We believe that frequent and regular communication with parents is a critical component to our collective success. Our primary means of communication with parents are our weekly newsletters, our website and our blog. In addition, parents will have access to monitor their students' performance through a parent portal on our student information system, Illuminate. Teacher and counselor/social worker communication with parents will be on an as needed basis and all staff have committed to respond to parent calls or emails within 24 hours.
- Twice each year, students will lead conferences with their parents and teachers. Students will be required to reflect on the progress of their academic goals and to develop plans for their continual growth that involves both their parents and teachers. We believe this collaborative approach led by students will be the most powerful way to involve parents in their children's education.
- We will establish a Parent Advisory Council which will provide Intrinsic parents with an additional way to engage in their child's education, as well as an official forum to give feedback, make suggestions and/or voice concerns. The PAC will be led by parent leaders

in partnership with the school's Principal. The PAC will also welcome any member of the larger community who would like to get involved with the school.

(5) Quality of project personnel (34 CFR 75.210(e)(1), (e)(2), and (e)(3)(ii)) (up to 22 points).

(i) The extent to which the applicant encourages applications for employment from persons who are members of groups that have traditionally been underrepresented based on race, color, national origin, gender, age, or disability (up to 2 points); and

We have been very intentional in staff recruitment efforts to encourage applications from persons who are members of groups that have traditionally been underrepresented. We used our personal networks to source many of our applicants and encouraged referrals for underrepresented groups. Further, we posted job openings on a wide variety of websites to ensure that we sourced applicants from diverse settings. We have had a great deal of success in this area. Approximately 50% (9 of 18) of our first year employees are ethnic minorities and 44% (8 of 18) of our first year employees are women. It is our intention to continue to seek out and hire staff from these and other underrepresented groups as our school expands to full enrollment.

(ii) The qualifications, including relevant training and experience, of key project personnel (up to 20 points).

Key Project Personnel

Intrinsic Schools has hired a robust staff with extensive experience in school leadership and oversight, new school launches and growth, development and implementation of innovative school design, curriculum development and implementation, and fiscal management. The

founding team includes the following individuals (please see attached resumes for additional detail):

Melissa Zaikos, Founder and CEO, has significant experience leading a network of elementary and high schools and working with communities throughout Chicago. Most recently, Zaikos led the Pershing Network, a network of schools in the Southwest communities of Chicago, comprising students who are 69% Latino, 15% African American, 12% Other and 4% Caucasian. Despite the fact that Pershing's students were also 96% low income (qualified for free and reduced meals) and 30% English Language Learners, average growth was 60.9% in Reading and 65% in Math in 2011-2012, results that would place any individual school in the top quartile for growth nationally. From 2005-2011, Zaikos was the Chief Area Officer for the Autonomous Management and Performance Schools (AMPS), managing a \$7 million departmental budget and overseeing more than 100 schools within CPS, where student performance increased from 68% to 87% of students meeting or exceeding standards on the ISAT. Under her leadership, AMPS led the district in data-driven instruction as the first schools to utilize the Northwest Evaluation Association MAP assessment, which is now used district-wide. AMPS also led the district in piloting various online curricula including ST Math and Compass Learning. In addition, in 2006, Zaikos led a team to secure a \$21.3 million grant for the district high school transformation strategy from the Bill and Melinda Gates Foundation, the largest grant to date from the Gates Foundation to a public school district.

Zaikos has a strong track record of developing district leaders, with six of her direct reports having been promoted to Chief of Schools. In addition, Zaikos has served as evaluator for the CPS principal eligibility process and has worked with Local School Councils throughout Chicago to hire over 50 Principals. Prior to her career in education, Zaikos was a business strategy consultant with a results-oriented reputation for engaging stakeholders, building teams

and applying rigorous analysis of data to complex, systems-wide challenges. She holds a Master of Business Administration from Harvard Business School and was a member of the Broad Fellowship for Education Leaders in 2011 and the Broad Residency in Urban Education from 2003-2005.

Brian Kates , Director of Finance & Operations, most recently served as the founding Director of Finance for the Achievement School District (ASD) in Tennessee, a state-wide district that works to turn around the bottom 5% of schools in the state. Kates led the finance department for an organization starting from scratch in May 2012 to managing six schools and over \$30 million for the 2012-13 school year. Prior to the ASD, Kates spent six years at the Charter School Growth Fund on the investment Management Team. He has extensive experience working with growing charter organizations both during strategic planning and execution of growth plans. He has worked with over 40 Charter Management Organizations in this capacity. He is a graduate of the Daniels College of Business at the University of Denver and holds a MS in Finance.

Suzanne Velasquez-Sheehy, Principal, has more than 25 years of service with the Chicago Public Schools. She served as the Principal at Clissold Elementary School from 2001-2008 and opened LaSalle II Magnet School in 2008. She was also a teacher, State Chapter 1 Coordinator, and an Assistant Principal at Seward Communication Arts Academy. In addition to a traditional school curriculum, she has experience with Montessori, International Baccalaureate Middle Years Program, Bilingual, and World Language programs. Her community work includes serving on the Board of Trustees for St. Xavier University and as a board member for the Beverly Arts Center. She is a doctoral candidate at DePaul University and has an MS in Educational Leadership from DePaul University and a BS in Elementary Education from University of Illinois, Champaign-Urbana.

Ami Gandhi, Curriculum Coordinator, is a Golden Apple scholar and seasoned instructor who has experience coaching school leaders, training teachers and conducting professional development. Most recently, she worked alongside Melissa Zaikos in the Pershing Network as an Instructional Support Leader, facilitating training in EXPLORE®, Common Core Mathematics Standards, and Differentiated Math Instruction with NWEA data. She also has extensive experience developing Response to Intervention plans as the RtI Coordinator/Instructional Manager for AMPS from 2010-2011. From 2006-2011, Gandhi was a highly successful Algebra teacher at Whitney Young Magnet High School, where 100% of her 7th grade students (452 students in total) exceeded the state standards on the ISAT and 96% passed the district Algebra exit exam as 7th graders. Gandhi has Illinois Gifted Education Certification from the Illinois Association for Gifted Children, Master Teacher certification in Early Adolescence / Mathematics from the National Board and Master of School Leadership and Type 75 Certification. She holds a Master of Science in Mathematics Education from the Illinois Institute of Technology and a Bachelor of Science in Education and Social Policy from Northwestern University.

Marcos Alcozer, Director of Technology, has more than eight years of experience as the technology coordinator for Northside College Prep High School in Chicago that is ranked as the number one school in Illinois and the number 33 school in the nation by US News and World Report. Alcozer brings experience leading a school-wide 1:1 device initiative, is a certified Google Educator and has developed software for school scheduling needs. He has expertise in student information systems, learning management systems and on-line grade books. In addition, he led a group of student to support school technology needs.

Michael Blades, English Master Teacher, has fourteen years experience teaching English in a variety of settings: Seoul, South Korea; Glenbrook North High School; Walter

Payton College Prep High School; and most recently at Evanston Township High School. In addition to his teaching duties, Mr. Blades has served as an Instructional Coach for the English department helping teachers realize the potential of their students and working to define and implement professional development that ensures success for all students. Blades holds a Bachelor's degree from Loyola University in Philosophy and English, Master's work in English Education from the University of Illinois at Chicago, and a Master's degree in School Leadership from Olivet Nazarene University. He is certified both as a teacher and as a school administrator in the State of Illinois.

Daniel Holder, Special Education Teacher, has worked as a special education teacher in Chicago Public Schools for four years, and recently served as the Department Chair at Hancock High School. As a teacher, Mr. Holder has served as a Yale National Teaching Fellow and has participated in district-wide curriculum development programs, where he has helped design accommodations and modifications to meet the needs of diverse learners. Mr. Holder holds a BA in History from the University of Chicago and a Masters degree in Special Education from National-Louis University.

Megan Kelly, Mathematics Teacher, has 10 years of teaching experience in elementary and middle school math. Ms. Kelly demonstrates leadership in technology integration, including evaluating and selecting platforms, providing professional development, and implementing technology within the extended school and parent community. Ms. Kelly has particular expertise and interest in using data to drive student performance, such as using Northwest Evaluation Association (NWEA) data to create curricula to individualize and improve learning. She has worked as an interventionist for students in need of extra support, as well as those needing extra challenges. Ms. Kelly obtained her Masters degree in Educational Leadership from DePaul University and her Bachelor's degree in Middle Childhood Education in Mathematics from the

University of Miami in Oxford, Ohio. She is certified as a math teacher and a school administrator.

Mike Walsh, Social Science Master Teacher, has been teaching for ten years in urban America. Most recently he was a founding teacher and Social Studies Department Chair at Cristo Rey Jesuit High School in Baltimore, Maryland. He was also a founding Special Education and Social Studies teacher at Bronx Leadership Academy II, a New Vision school in Bronx, New York. He holds a BA in Social Science and History from St. Mary's University in Winona, MN and an MA in Teaching Students with Disabilities from Teachers College Columbia University New York, NY. Mike holds a New York State Professional Teaching Certificate for grades 7-12 in Social Studies and Special Education.

Aracelys Rios, Science Master Teacher, has over 18 years of teaching experience at the secondary and post-secondary levels. She holds a MA in teaching from National Louis University and a Ph.D. in physical chemistry from Michigan State University. For the past ten years, Rios taught at the Illinois Math and Science Academy (IMSA), a residential STEM school for gifted students. She is bilingual in Spanish and has led efforts around minority student recruitment and trained faculty on issues related to preparing Latino students for college success.

Board of Directors

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

Jim Frank – In his capacity as President and CEO of Wheels Inc., Frank has led the international corporation to great success. Frank has been an innovator in the fleet management industry by designing and implementing the first IT systems that aggregated large amounts of data for improved fleet management. Frank has also been an industry leader, helping to shape regulatory and legislative issues affecting fleets. In addition to his role as Board Chair for Intrinsic Schools, Frank is currently Vice Chairman of the Board of Trustees of the University of Chicago Hospitals, a member of the Board of Trustees of the University of Chicago, Chair of the Finance Committee of the Field Museum of Chicago. He also serves on the Board of the Illinois Network of Charter Schools (INCS) and on the Board of Overseers at Northwestern University’s Kellogg School of Management.

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

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

education non-profit organization, education advocacy and Board experiences will make her a valuable addition to the Board.

Matt Moog - Moog is the Founder & CEO of Wavetable Labs a digital business incubator, Founder & CEO of Viewpoints.com, a leading provider of consumer reviews, and the Founder of BuiltInChicago.org ,an online community for digital technology entrepreneurs in Chicago. Previously Moog spent ten years at CoolSavings.com where he served as VP of Sales, EVP of Sales and Marketing, and President & CEO. Prior to CoolSavings, Moog worked for Microsoft for five years in business development helping to launch MSN in 1995. In addition to serving as a board member for Intrinsic Schools, Moog serves as the Vice Chair of Chicago Public Media, on the board of YPO Chicago where he is the education chair, on the board of Francis Parker School where he is the treasurer, and on the board of VASCO Data Security a publicly company. Moog was named to Crain's Tech 25 in 2011 and to Crain's 40 under 40 in 2005. He has been nominated for the Ernst & Young Entrepreneur of the Year Award for both CoolSavings and Viewpoints.

Jim Palos –Palos is an education innovator and an ardent champion, particularly for urban education. He most recently served as the president of Wright College. With an enrollment of 14,500 students and academic offerings in Credit, Adult Education, Continuing Education, and Occupational Training, Wright is the largest of the City Colleges of Chicago. In 2002 Palos founded and served as the first president of the Institute for Media and Entertainment (now a part of IESE Business School). The Manhattan-based school provides management education for media and entertainment executives. Previously Palos founded the Latino Education Alliance, an initiative to improve educational opportunities and outcomes for Latino students in Illinois. Prior to that Palos was executive director of Midtown Educational Foundation (MEF), a Chicago-based nonprofit that provides after-school educational and leadership programs for inner-city

students in grades 4 – 12. Under Palos’ leadership, MEF tripled enrollment and quadrupled program space. Palos grew up in Chicago’s Humboldt Park and is a former student of MEF (he currently serves as a board member). Prior to his education positions, Palos worked in the Office of Management and Budget for the City of New York, and as a business analyst for Honeywell. Palos received his BA from Columbia University in New York and his MBA from the Kellogg School of Management. Palos is a member of the Alumni Council for the Kellogg School. He also serves on the Board of two Chicago charter schools: Alain Locke Charter School and the Intrinsic School. For six years Palos was a member of the Illinois State Board of Education. He is a past Fellow of Leadership Greater Chicago, and served as president of the alumni board for the organization. He was selected by *Crain’s Chicago Business* for its “40 under 40” listing.

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

(6) Quality of the management plan (34 CFR 75.210(g)(1) and (g)(2)(i)) (up to 18 points).

As evidenced above, our board of directors and management team have a depth of leadership and oversight experience which have been and will continue to be invaluable to Intrinsic Schools as we collectively work to achieve our mission and realize our educational and operational objectives.

While the leadership team will lead the day-to-day management of the organization, the Intrinsic Schools Board will be ultimately responsible for the effectiveness and success of Intrinsic Schools. The Board will set long-term goals and strategy, provide current oversight of the finances and programs of the school and ensure compliance with applicable laws, the bylaws and the charter. The Board will ensure that the leadership team achieves the objectives of this project on time and within budget and will fulfill the following key oversight functions:

- **Academic Oversight** – The Board, working with the CEO and school staff will set academic goals for each year. The CEO and school staff will design curriculum, implement programs, allocate resources and collect data. The Education Committee, a Board committee, will support the CEO and school staff in their work. At each Board meeting real-time data on student performance will be presented to the Board, and adjustments to academic programs and/or resource allocation will be considered on a frequent basis in line with the Intrinsic value of continuous improvement.
- **Operational Oversight** – Prior to the beginning of each fiscal year, the CEO will present an annual budget to the Board for approval. The Board will review and approve the annual budget for each school and for the organization as a whole, and any material changes to the budget will require the Board to approve an amended budget. At each Board meeting, the Board will be presented and will review the financial statements of each school and the organization. The Board will hire an auditor and review and approve the annual audit of the organization. At each meeting the Board will also receive updates regarding each facility and its operations. The Board will also approve all financial policies that set the processes and controls for contracts, expenditures, and internal control.

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

The management team will be led by Melissa Zaikos, the Intrinsic Schools CEO, and will be comprised of the CEO, Director of Finance and Operations, Director of Technology, Principal, Curriculum Coordinator and Master Teachers.

The **CEO** will supervise all senior leadership staff (with the exception of the Master Teachers), and act as the liaison to the Board of Directors, major donors and Chicago Public Schools. She will establish, promote and implement the vision of Intrinsic Schools and work directly with the board to further develop and implement the Intrinsic Schools strategic plan. The CEO will be accountable to the Board and Chicago Public Schools for the academic and operational performance of the school. She will continuously evaluate the school model and

assess what is working and can be replicated at scale. Furthermore, she will serve as the project director for this grant and hold the responsibility for ensuring that Intrinsic Schools achieves its objectives on time and within budget.

The **Director of Finance and Operations** is responsible for all financial, budget, operations, and compliance activities for Intrinsic Schools. He will be the staff liaison to the Audit and Finance committees of the Board of Directors and will work with other members of the leadership team to develop and implement the school's strategic plan. He will be directly responsible for managing the finances related to this grant.

The **Principal** supervises and evaluates all instructional staff and manages the school's education program. She will be directly responsible for implementing a college going culture, managing student discipline and developing and maintaining the school's relationship with parents. She will lead the implementation of the curriculum and instructional strategies as well as the creation of a robust professional development program.. She will closely monitor data trends and work with the teachers to utilize the data to inform and drive curricular decisions and refinement instructional practices.

The **Curriculum Coordinator** will be responsible for continuous evaluation and development of the Intrinsic Schools curriculum and its implementation. She will support the teachers to ensure that they have the resources that they need to successfully implement the curriculum and will lead them in the ongoing curricular iteration and design. As we are developing much of our own curriculum the Curriculum Coordinator will play a central role in our success in meeting the school's objectives. The Curriculum Coordinator will be one of the key staff members working on this grant.

The **Director of Technology** leads the blended learning strategy development. He will work with school leadership and teachers to develop a vision for how technology can support

instruction. Based on this vision, he will test and select hardware and software to meet the school’s short and long-term needs. In addition, the Director of Technology will administer systems and manage technical support. He will also build the systems and processes necessary to position Intrinsic Schools to be a data driven organization.

The **Master Teachers** are key members of the school leadership team and contribute significantly to the design of the school. We will have one Master Teacher in each of the core disciplines as well as special education. Master Teachers have deep content knowledge in their subject areas as well as pedagogical expertise. In addition to leading and coaching other teachers, the Master Teachers will refine the school model and develop curricula in collaboration with the Curriculum Coordinator. During each of the next three years Master Teachers will be hired over the summer to prepare curricula and implementation strategies for the following year as the school expands from its first year of 9th grade only to its full grade range of 7th-12th grade students.

As the school is opening in less than two months, we have met the vast majority of the planning and design milestones that we established to guide our work over the course of the last twelve months. As we transition into the implementation phase of our school launch, we are focusing on the following mission critical activities in order to realize the objectives detailed in the response to Selection Criteria (3):

Key Success Factor	Milestone / Target	Timeline	Responsibility
Design around individual students	Develop template for personalized learning plans	Fall 2013	Curriculum Coordinator

Key Success Factor	Milestone / Target	Timeline	Responsibility
	Define mastery based grading system	Fall 2013	Curriculum Coordinator
	Finalize master schedule	Fall 2013	Principal
Provide real time feedback	Select and purchase learning management system	Fall 2013	Director of Technology
	Finalize data systems data tracking progress toward post-secondary goals	Spring 2014	Director of Technology
	Develop process flow for student goal setting	Fall 2013	Curriculum Coordinator
Create Culture of Student Ownership	Define measures for tracking core values (Empathy, Perseverance, Independence, and Curiosity)	Spring 2014	CEO
	Select a tool for student digital portfolios	Spring 2014	Director of Technology
	Lead parent workshops and communication with parents about how they can support student independence	Ongoing	Principal

Key Success Factor	Milestone / Target	Timeline	Responsibility
Foster Intellectual Curiosity	Establish projects that deepen student learning	Ongoing	Curriculum Coordinator and Master Teachers
	Define curriculum that requires students to design, create and iterate	Ongoing	Curriculum Coordinator
Cultivate Instructional Talent and Build Capacity	Research and target universities with graduates who have the skills we need	Ongoing	CEO and Principal
	Identify and begin using research based hiring tools such as Teacher Match	Every winter	CEO and Principal
	Hold events to cultivate teacher interest in blended learning	Every fall and winter	CEO and Principal
Constantly Iterate and Improve	Develop processes for evaluating model continuous improvement activities	Fall 2013	CEO, Principal and Curriculum Coordinator
	Train all staff on process to design, create and iterate.	Fall of each school year	Curriculum Coordinator

Key Success Factor	Milestone / Target	Timeline	Responsibility
	Evaluate, iterate and improve curricula, instructional practices and technology integration.	Ongoing	Curriculum Coordinator and Master Teachers
	Evaluate, iterate and improve student assessment strategies	Ongoing	Curriculum Coordinator and Principal
	Evaluate, iterate and improve professional development program	Ongoing	Principal
	Establish focus on what is and is not producing student outcomes and the willingness to abandon programs or ideas that are not producing results	Ongoing	CEO and Leadership Team
	Advise Board of Directors regarding all substantive changes to the educational program.	Ongoing	CEO and Board
Sound financial management and school operations	Develop an annual balanced budget	Ongoing	Director of Finance and Operations

Key Success			
Factor	Milestone / Target	Timeline	Responsibility
	Manage spending not to exceed board approved budget	Ongoing	Director of Finance and Operations
	Maintain a minimum of 30 days cash on hand	Ongoing	Director of Finance and Operations
	Meet authorizer compliance requirements	Ongoing	Director of Finance and Operations
	Retain a minimum of 80% of teaching staff	Ongoing	Principal
	Meet student recruitment target of at least 2 applicants for every open seat.	Ongoing	CEO and Principal

(7) Existence and quality of a charter or performance contract between the charter school and its authorized public chartering agency (20 U.S.C. 7221i(1)(L)) (up to 16 points).

Intrinsic Schools was approved by the Chicago Public Schools (CPS) Board of Education on April 24, 2013 to open a charter school in fall 2013 and was granted a five-year charter. We do not yet have a contract from CPS as it is the CPS practice to approve a charter and negotiate the contract at a later date. In lieu of the contract, we have provided a letter from CPS confirming our approval and stating that Intrinsic Schools will be held to a “robust academic,

financial and compliance accountability plan.” As we do not yet have a copy of this plan, we have attached the 2010-2011 Charter Accountability Plan which is publically available on the CPS website.

(8) The degree of flexibility afforded by the SEA and, if applicable, the LEA to the charter school (20U.S.C. 7721c(b)(2)) (up to 3 points).

The flexibility and autonomy afforded by the SEA, Illinois State Board of Education, and the LEA, Chicago Public Schools, is outlined in the Illinois School Code. (105 ILCS 5/Art. 27A), Illinois State Charter Schools Law. The law specifically states that its purpose is to provide an avenue for the creation of innovative educational techniques and programs.

Illinois State Charter School law exempts charter schools from nearly all state rules that inhibit flexible operation and management. This law exempts charter schools from all other state laws and regulations in the School Code governing public schools and local school board policies with a the following exceptions:

- The requirement to conduct background checks
- Portions of the code related to student discipline
- Portions of the code related to school report cards
- The Tort Immunity Act
- The section f the General Not for Profit Corporation Act regarding indemnification of officers directors, employees, and agents
- The Abused and Neglected Child Reporting Act
- The Illinois Student Records Act
- The P-20 Longitudinal Education Data Systems Act
- The Educational Labor Relations Act.

In addition, the law specifically states that a charter school is responsible for the management and operations of its fiscal affairs. Further, charter schools are granted autonomy to select vendors and service providers. The law also provides charter schools with tremendous autonomy regarding personnel. The only restrictions related to hiring are that a minimum of 75% of instructional staff must be state certified and those who are not state certified must meet certain minimum requirements. As a charter school, Intrinsic Schools has the freedom and flexibility to establish its own: school calendar and schedule, curricula, employment policies, student discipline policies and manage its own operations.

Other Attachment File(s)

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Date of this notice: 06-08-2012

Employer Identification Number:
45-5454261

Form: SS-4

Number of this notice: CP 575 E

INTRINSIC SCHOOLS
4517 N ARTESIAN AVE
CHICAGO, IL 60625

For assistance you may call us at:
1-800-829-4933

IF YOU WRITE, ATTACH THE
STUB AT THE END OF THIS NOTICE.

WE ASSIGNED YOU AN EMPLOYER IDENTIFICATION NUMBER

Thank you for applying for an Employer Identification Number (EIN). We assigned you EIN 45-5454261. This EIN will identify you, your business accounts, tax returns, and documents, even if you have no employees. Please keep this notice in your permanent records.

When filing tax documents, payments, and related correspondence, it is very important that you use your EIN and complete name and address exactly as shown above. Any variation may cause a delay in processing, result in incorrect information in your account, or even cause you to be assigned more than one EIN. If the information is not correct as shown above, please make the correction using the attached tear off stub and return it to us.

Assigning an EIN does not grant tax-exempt status to non-profit organizations. Publication 557, *Tax Exempt Status for Your Organization*, has details on the application process, as well as information on returns you may need to file. To apply for formal recognition of tax-exempt status, most organizations will need to complete either Form 1023, *Application for Recognition of Exemption Under Section 501(c)(3) of the Internal Revenue Code*, or Form 1024, *Application for Recognition of Exemption Under Section 501(a)*. Submit the completed form, all applicable attachments, and the required user fee to:

Internal Revenue Service
PO Box 12192
Covington, KY 41012-0192

The Pension Protection Act of 2006 contains numerous changes to the tax law provisions affecting tax-exempt organizations, including an annual electronic notification requirement (Form 990-N) for organizations not required to file an annual information return (Form 990 or Form 990-EZ). Additionally, if you are required to file an annual information return, you may be required to file it electronically. Please refer to the Charities & Non-Profits page at www.irs.gov for the most current information on your filing requirements and on provisions of the Pension Protection Act of 2006 that may affect you.

To obtain tax forms and publications, including those referenced in this notice, visit our Web site at www.irs.gov. If you do not have access to the Internet, call 1-800-829-3676 (TTY/TDD 1-800-829-4059) or visit your local IRS office.

INTERNAL REVENUE SERVICE
P. O. BOX 2508
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: MAY 23 2013

INTRINSIC SCHOOLS
C/O MICHAEL P MOSHER
33 N LASALLE ST STE 3400
CHICAGO, IL 60602

Employer Identification Number:
45-5454261
DLN:
17053307318032
Contact Person:
SANDRA MAK ID# 95023
Contact Telephone Number:
(877) 829-5500
Accounting Period Ending:
June 30
Public Charity Status:
170(b)(1)(A)(ii)
Form 990 Required:
Yes
Effective Date of Exemption:
June 8, 2012
Contribution Deductibility:
Yes
Addendum Applies:
Yes

Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. We determined that you are a public charity under the Code section(s) listed in the heading of this letter.

Please see enclosed Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, for some helpful information about your responsibilities as an exempt organization.

Letter 947 (DO/CG)

INTRINSIC SCHOOLS

We have sent a copy of this letter to your representative as indicated in your power of attorney.

Sincerely,

A handwritten signature in black ink that reads "Holly O. Paz". The signature is written in a cursive style with a large, looped "H" and "P".

Holly O. Paz
Director, Exempt Organizations
Rulings and Agreements

Enclosure: Publication 4221-PC

Letter 947 (DO/CG)

INTRINSIC SCHOOLS

INFORMATION FOR CHARTER SCHOOLS

You are not subject to the specific publishing requirements of Revenue Procedure 75-50, 1975-2 C.B., page 587, as long as you are operating under a contract with the local government. If your method of operation changes to the extent that your charter is terminated, cancelled, or not renewed, you will be required to comply with Revenue Procedure 75-50.

Letter 947 (DO/CG)



Office of Innovation and Incubation

Access & Enrollment • Innovative Models • New Schools • Service Academies

July 10, 2013

LaShawndra Thornton
Charter Schools Program
U.S. Department of Education
400 Maryland Ave., SW
Washington, DC 20202-5970

Ms. Thornton,

Chicago Public Schools has received notice via email under Section 5203(d)(3) of the ESEA that Intrinsic Schools is applying for the Charter Schools Program federal grant. The Office of Innovation and Incubation fully supports the grant application for these important funds, which will help Intrinsic Schools build a strong school that will provide much needed access to high quality school options for the students in the Irving Park Community.

On April 24, 2013, the Chicago Board of Education approved Chicago Public Schools to enter into a Charter School Agreement with Intrinsic Schools to operate Intrinsic Charter School for a five-year period. The Charter School Agreement (or "contract") is still being negotiated, but will not be completed by the deadline for this grant. This Charter School Agreement will define a robust academic, financial, and compliance accountability plan for Intrinsic Charter School, to which the school will be held accountable over the course of the five-year charter and on which the school will be assessed in the District's renewal process. The contract will also include a performance policy that describes how student performance will be measured.

The Chicago Board of Education typically authorizes charter schools to begin startup and incubation planning prior to executing a contract with the operator. The Office of Innovation and Incubation can provide full assurance that Intrinsic Charter School is on track to open in the fall of 2013; the school conducted a lottery in Spring 2013 to enroll students in Fall 2013.

If the United States Department of Education has any additional questions regarding Intrinsic Charter School, please reach out to me directly.

Best,

Jack J. Elsey, Jr.
Chief of Innovation and Incubation
Chicago Public Schools

CHARTER ACCOUNTABILITY PLAN - 2010-2011 SCHOOL YEAR

The Board and the Charter School have determined that it is in the best interests of the Board, the Charter School, students, parents and the public to articulate clear standards for the Charter School. The governing board of the Charter School shall be responsible for overseeing the academic performance of the Charter School and ensuring the academic success of the Charter School's students. At a minimum, academic success is defined as Level 2 in the below plan. Additionally, the governing board of the Charter School is responsible for ensuring that the Charter School's financial management and compliance meets the minimum acceptable standards, defined as Average performance in the below plan. The governing board of the Charter School shall be held accountable through an annual performance evaluation and the publishing of a public Performance Scorecard outlining the level of achievement of the Charter School with respect to those standards. This document outlines the Accountability Plan for the 2009-10 school year.

1. Accountability Components

The Board and the Charter School hereby agree that the Charter School shall be evaluated annually in accordance with the Agreement and this Accountability Plan, as may be amended from time to time in order to ensure, at a minimum, alignment with the district's School Performance, Remediation and Probation Policy ("PRPP").

2. Annual Performance Scorecard

Annually the Board shall publish a Performance Scorecard indicating the Charter School's performance overall and by each Attendance Center or campus if applicable, on each of the indicators in the following two categories: Pupil Performance and Financial Management and Compliance. A Performance Scorecard for the preceding school year will be issued each year as soon as the data and corresponding analysis is available.

Pursuant to the School Performance, Remediation and Probation Policy for both elementary and high schools adopted by the Board on June 24, 2009 (09-0624-PO1), as may be amended from time to time, CPS will assign Charter Schools an accountability designation for purposes of comparison to other CPS schools and public reporting. Under the policy, a school shall receive one of three ratings: Remediation, Probation or Good Standing. The level of the Charter School's achievement and progress will be determined by indicators under the following categories: a) Current Status, b) Trends, and c) Student Growth.

The PRPP shall be used to determine if a school is meeting or making reasonable academic progress, as defined in the Illinois Charter Schools Law. This determination

shall be used in decisions concerning the revocation or renewal of a school's charter or contract.

For the Financial Management and Compliance Indicators, the Charter School's performance on each indicator will be rated as follows:

- 4 - Strong Performance
- 3 - Average performance
- 2 - Below average performance
- 1 - Poor performance

This Accountability Plan establishes the performance levels, listed below, which generate the ratings for each indicator. However, additional information or extenuating circumstances may lead the Board to rate an indicator higher or lower than when performance level criteria are strictly applied.

A. Pupil Performance

The intent of the Pupil Performance section is to provide a multi-faceted understanding of student performance at the Charter School upon which the Charter School's academic performance will be evaluated. Pupil performance will be evaluated based on Current Status, Trends, and Student Growth indicators. The Performance Indicators will be awarded between 0 and 3 points as defined in the Performance Policy Legends below.

Standardized Tests

In the spring of each year, the Charter School shall participate fully in the Illinois Standards Achievement Test ("ISAT") for grades 3 through 8 and the Prairie State Achievement Examination ("PSAE") and ACT for grade 11. Additionally, the Charter School shall participate in the EXPLORE Test in grade 9 and the PLAN Test in grade 10 during the administration period agreed upon by the Chicago Public Schools and the Charter School. Data from these assessments will be compiled and evaluated as described below. If for any reason the Chicago Public Schools ceases to use any of the assessment systems described herein, the Board shall implement, for Charter School accountability purposes, the same alternate student assessment system and test measure criteria used for district's students.

Additional Student Performance Indicators and Data Required

The Charter School's attendance rate, freshman on track rate (for high schools), one-year dropout rate (for high schools), and AP exam metrics (for high schools) will also be

assessed. Additionally, all schools will be required to administer the My Voice, My School survey annually.

In general, schools will be required to submit all relevant data necessary to calculate the metrics outlined in the PRPP. The AP Enrollment and AP Success metrics, however, will be optional for this year as all schools do not currently offer these classes. A school may choose to opt-in to these metrics but once this decision has been made, a school cannot opt-out at a later date. Schools that do not opt-in to these metrics will receive zero points possible.

Adequate Yearly Progress

As required by the Federal No Child Left Behind Act, Illinois has set annual Adequate Yearly Progress (“AYP”) targets for student performance on the ISAT and PSAE assessments. Charter Schools receiving Title I funds must meet these targets to achieve AYP. If the Charter School receives Title I funds and fails to make AYP for 2 consecutive years, it shall be designated as a school in need of School Improvement and will face sanctions as required by Federal law. However, the Charter School will not face any sanctions if it is not receiving Title I funds.

At the time of execution of this Agreement, the annual AYP targets for the ISAT and PSAE are anticipated to be as follows. In the event that the AYP targets are revised, the Charter School will be subject to the revised targets.

Year	2009	2010	2011	2012	2013	2014
Target	70%	77.5%	85%	92.5%	92.5%	100%

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Elementary School Performance Policy Legend (re: Policy No. 09-0624-PO1)

Assigning Current Status Points		
<u>Metrics</u>	<u>If current status score is...</u>	<u>School receives</u>
ISAT Reading Meets/Exceeds	50.0% to 69.9% 70.0% to 79.9% 80.0% or more	1 point 2 points 3 points
ISAT Mathematics Meets/Exceeds	50.0% to 69.9% 70.0% to 79.9% 80.0% or more	1 point 2 points 3 points
ISAT Science Meets/Exceeds	50.0% to 69.9% 70.0% to 79.9% 80.0% or more	1 point 2 points 3 points
ISAT Composite Exceeds	5.0% to 14.9% 15.0% to 24.9% 25.0% or more	1 point 2 points 3 points
ISAT Composite Exceeds Highest Grade Level	5.0% to 14.9% 15.0% to 24.9% 25.0% or more	1 point 2 points 3 points
Attendance	90% to 92.9% 93% to 94.9% 95% or more	1 point 2 points 3 points
<p>Note: Current Status points are determined by the average of 2008 and 2009 scores or just 2009 scores if a school does not have two years of data. A school must have at least 2009 data to receive a current status score.</p>		

Assigning Trend Points		
<u>Metrics</u>	<u>If trend score is...</u>	<u>School receives</u>
ISAT Reading Meets/Exceeds (Ceiling = 90%)	0.1% to 2.9%	1 point
	3% to 5.9%	2 points
	6% or more	3 points
ISAT Mathematics Meets/Exceeds (Ceiling = 90%)	0.1% to 2.9%	1 point
	3% to 5.9%	2 points
	6% or more	3 points
ISAT Science Meets/Exceeds (Ceiling = 90%)	0.1% to 2.9%	1 point
	3% to 5.9%	2 points
	6% or more	3 points
ISAT Composite Exceeds (Ceiling = 90%)	0.1% to 2.9%	1 point
	3% to 5.9%	2 points
	6% or more	3 points
ISAT Composite Exceeds Highest Grade Level (Ceiling = 90%)	0.1% to 2.9%	1 point
	3% to 5.9%	2 points
	6% or more	3 points
Attendance (Ceiling = 95%)	0.1% to 0.4%	1 point
	0.5% to 0.9%	2 points
	1% or more	3 points
<p>Note: If 2009 score is above ceiling, school receives all 3 points. Otherwise, trend points are determined by 2009 score minus average of prior 3 years of data. If school does not have 3 years of prior data, then the average of the prior 2 years is used. School must have at least 2007-2009 data to receive a trend score.</p>		

Assigning Growth Points		
<u>Metrics</u>	<u>If growth score is....</u>	<u>School receives</u>
Value-Added Reading	-2.2 to -0.1	1 point
	0 to 2.1	2 points
	2.2 or more	3 points
Value-Added Mathematics	-2.7 to -0.1	1 point
	0 to 2.6	2 points
	2.7 or more	3 points
<p>Note: Score represents the difference between this school's average student growth on the ISAT and the average growth of similar students district-wide.</p>		

Assigning Levels

<u>If total points are...</u>	<u>...or if % of points is...</u>	<u>School is at Level</u>
30 or more	71% or more	1
21 - 29	50% to 70.9%	2
18 - 20	42.9% to 49.9%	3 (Review)
Less than 18	Less than 42.9%	3

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High School Performance Policy Legend (re: Policy No. 09-0624-PO1)

Assigning Current Status Points		
<u>Metrics</u>	<u>If current status score is...</u>	<u>School receives</u>
Average ACT	16 to 17.9	1 point
	18 to 19.9	2 points
	20 or more	3 points
One Year Drop Out	6.1% to 10%	1 point
	2.1% to 6%	2 points
	2% or less	3 points
Freshman On Track	45% to 59.9%	1 point
	60% to 79.9%	2 points
	80% or more	3 points
Attendance	85% to 89.9%	1 point
	90% to 94.9%	2 points
	95% or more	3 points
PSAE Meets/Exceeds Reading	30% to 49.9%	1/3 point
	50% to 69.9%	2/3 points
	70% or more	1 point
PSAE Meets/Exceeds Mathematics	30% to 49.9%	1/3 point
	50% to 69.9%	2/3 points
	70% or more	1 point
PSAE Meets/Exceeds Science	30% to 49.9%	1/3 point
	50% to 69.9%	2/3 points
	70% or more	1 point
AP Enrollment	NA	
AP Success	NA	
<p>Note: Current Status points are determined by the average of 2008 and 2009 scores or just 2009 scores if a school does not have two years of data. A school must have at least 2009 data to receive a current status score.</p>		

Assigning Trend Points		
<u>Metrics</u>	<u>If trend score is...</u>	<u>School receives</u>
Average ACT (Ceiling = 23)	0.1 to 0.4	1 point
	0.5 to 0.9	2 points
	1 or more	3 points
One Year Drop Out (Ceiling = 0.5%)	-0.1% to -0.9%	1 point
	-1% to -2.9%	2 points
	-3% or more	3 points
Freshman On Track (Ceiling = 90%)	0.1% to 2.4%	1 point
	2.5% to 4.9%	2 points
	5% or more	3 points
Attendance (Ceiling = 95%)	0.1% to 0.4%	1 point
	0.5% to 0.9%	2 points
	1% or more	3 points
PSAE Meets/Exceeds Reading (Ceiling = 90%)	0.1% to 2.4%	1/3 point
	2.5% to 4.9%	2/3 points
	5% or more	1 point
PSAE Meets/Exceeds Mathematics (Ceiling = 90%)	0.1% to 2.4%	1/3 point
	2.5% to 4.9%	2/3 points
	5% or more	1 point
PSAE Meets/Exceeds Science (Ceiling = 90%)	0.1% to 2.4%	1/3 point
	2.5% to 4.9%	2/3 points
	5% or more	1 point
AP Enrollment (Ceiling = 35%)	0.1% to 2.4%	1 point
	2.5% to 4.9%	2 points
	5% or more	3 points
AP Success (Ceiling = 90%)	0.1% to 0.9%	1 point
	1% to 2.9%	2 points
	3% or more	3 points
<p>Note: If 2009 score is above ceiling, school receives all 3 points. Otherwise, trend points are determined by 2009 score minus average of prior 3 years of data. If school does not have 3 years of prior data, then the average of the prior 2 years is used. School must have at least 2007-2009 data to receive a trend score.</p>		

Assigning Growth Points		
<u>Metrics</u> EPAS Gains Reading	<u>If growth score is....</u> 15 th to 49 th percentile 50 th to 84 th percentile 85 th percentile or more	<u>School receives</u> 1 point 2 points 3 points
EPAS Gains Mathematics	15 th to 49 th percentile 50 th to 84 th percentile 85 th percentile or more	1 point 2 points 3 points
Note: Growth points are based on 2008 EPAS Gains scores. Growth score is school's percentile rank among CPS schools, not the percentage of students making gains.		

Assigning Levels		
<u>If total points are...</u> 24 or more 16 to 23 ² / ₃ 13 - 15 ² / ₃ Less than 13	<u>...or if % of points is...</u> 66.7% or more 44% to 66.6% 36% to 43.9% Less than 36%	<u>School is at Level</u> 1 2 3 (Review) 3

B. Financial Management and Compliance

The following Financial Management and Compliance Categories will be included on and evaluated for each Performance Scorecard: Financial Condition and Budget, Financial Controls, Reporting, and Legal Compliance. The school will receive points for each indicator based on the rubric described below. Performance against each indicator will be reported on the Annual Performance Scorecard.

Financial Condition and Budget

This category measures the overall financial health of the school based on the change in net assets, liquidity, net asset ratio, cash-on-hand, student enrollment, loan delinquency, and the reasonableness of the budget. Points will be assigned for each indicator as follows:

Indicator	+4	+3	+2	+1
Change in Net Assets	Increase in net assets equal to or greater than budgeted surplus	Increase in net assets less than budgeted surplus or realizing a balanced budget	Decrease in net assets equal to or less than budgeted deficit	Unbudgeted decrease in net assets or decrease in net assets greater than budgeted deficit
Liquidity	Current ratio is greater than or equal to 1.3	Current ratio is less than 1.3 but greater than or equal to 1.1	Current ratio is less than 1.1 but greater than or equal to 1.0	Current ratio is less than 1.0
Net Asset Ratio	Net assets are greater than or equal to 30% of total assets	Net assets are greater than or equal to 20% of total assets but less than 30%	Net assets are greater than or equal to 10% of total assets but less than 20%	Net assets are less than 10% of total assets
Cash-on-Hand	Cash/avg. monthly expenses greater than or equal to 3.0	Cash/avg. monthly expenses greater than or equal to 1.0 but less than 3.0	Cash/avg. monthly expenses greater than or equal to 0.75 but less than 1.0	Cash/avg. monthly expenses less than 0.75
Student Enrollment	Actual enrollment greater than or equal to 100% of budgeted enrollment	Actual enrollment greater than or equal to 95% of budgeted enrollment	Actual enrollment greater than or equal to 90% of budgeted enrollment	Actual enrollment less than 90% of budgeted enrollment

Indicator	+4	+3	+2	+1
Loan Delinquency	No late payments in last twelve months, or no outstanding debt	One late payment in last twelve months	Two or three late payments in last twelve months	More than three late payments in last twelve months
Budget	Realistic budget w/ reasonable assumptions and revisions allowed through the end of October	Realistic budget w/ mostly reasonable assumptions and revisions allowed through the end of October	Realistic budget w/o assumptions and needs to be resubmitted	Unrealistic budget w/ unreasonable assumptions and needs to be resubmitted

The Board shall use the annual budget submitted pursuant to paragraph 6.b. of the Agreement and the annual Financial Audit, required under paragraph 6.a., along with any other relevant information as part of the Financial Condition and Budget Category.

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Financial Controls

This category assesses the fiscal soundness of the financial system in place at each school, taking into consideration the auditor’s independent review as well as the fiscal policy and procedures of the school.

Indicator	+4	+3	+2	+1
Annual Audit	Unqualified opinion, no material weaknesses or significant deficiencies	Unqualified opinion; one significant deficiency noted, but school will address within 12 months	Unqualified opinion, with two noted significant deficiencies.	Unqualified opinion, with a noted material weakness or three or more significant deficiencies; or an audit with a qualified opinion
Reporting & Oversight	System generates monthly comprehensive financial reports, which are reviewed monthly by a member or committee of the board. Board meets at least bi-monthly, with appropriate committee structure; strong financial systems and oversight with significant financial expertise.	System generates most reports on a quarterly basis, which are reviewed quarterly by a member or committee of the board. Board meets quarterly, with adequate committee structure; average financial systems; sufficient financial expertise.	System generates few reports regularly; school lacks adequate management and/or board review of financial reports. Board meets less than once a quarter with weak committee structure; financial systems in need of improvement; minimum financial expertise.	System to generate reports is weak; inadequate or no board/committee review; board involvement and committee structure is non-existent; poor financial systems; no financial expertise.

The following items, required by paragraph 6.a. and 6.k. of the Agreement, shall be evaluated and presented as part of the Financial Controls Category:

- a) the Charter School’s audit report opinion on its financial statements;
- b) the Charter School’s audit report on compliance and internal control over financial reporting based on an audit of the financial statements performed in accordance with Government Auditing Standards and the Single Audit Act of 1984, as amended; and

- c) the Charter School’s financial systems and policies.

Reporting

This category measures a school’s timely submission of annual budgets, quarterly statements, audit reports, and other compliance documents required at the federal, state and local levels as outlined in the Office of New Schools’ compliance chart.

Indicator	+4	+3	+2	+1
Budget	Budget is submitted on a timely basis	Budget is submitted late one time but with prior notification to and acknowledgement by CPS	Budget is submitted more than 45 days late	Budget is submitted more than 45 days late for second year in a row, or not submitted at all
Quarterly Statements	Quarterly statements are submitted on a timely basis	Quarterly statement submitted late one time	Quarterly statement submitted late two times	Quarterly statement submitted late three or more times, or not submitted at all
Audit	Audit is submitted on a timely basis	Audit is submitted with one delay but with prior notification to and acknowledgement by CPS	Audit is submitted with significant delay (45 days late)	Audit is submitted with significant delay (45 days late) for second year in a row, or not submitted at all
Fed/State/CPS Compliance Document Submissions	Timely submittal of all required documents	Late submittal of up to two required documents	Late submittal of three required documents	Late submittal of more than three required documents

Legal Compliance

This category measures legal compliance reflected and reported in the annual audit and detailed in any findings.

Indicator	+4	+3	+2	+1
Legal Compliance	Auditor report on compliance reflects no findings	Auditor report on compliance reflects one finding	Auditor report on compliance reflects two findings	Auditor report on compliance reflects three or more findings, and/or audit states that corrections have not been made for prior year finding(s)
Contract Terms and IL Charter Schools Law/Applicable State/Federal Law*	No violations	One violation w/ timely response	Two violations w/ timely responses	Three or more violations or violations w/o timely response

* In the event that the Board deems that there has been a violation of this Agreement or the Illinois Charter Schools Law, the Office of New Schools shall give the Charter School written notice enumerating the specific violation and the period of time during which the Charter School shall have the opportunity to (1) cure such violation or (2) provide an action plan to remedy the violation.

The following items, required by paragraph 6.a.iii. of the Agreement shall be tested and reported upon annually by the Charter School’s independent auditor and evaluated and presented as part of the Legal Compliance Indicator:

- a) Fingerprint-based criminal background investigations and checks of the Statewide Sex Offender Database and the Statewide Child Murderer and Violent Offender Against Youth Database (105 ILCS 5/34-18.5)
- b) Administration of Medication (105 ILCS 5/10-22.21b)
- c) Hazardous Materials Training (105 ILCS 5/10-20.17a)
- d) School Safety Drill Act (105 ILCS 128/1 *et seq.*)
- e) Abused and Neglected Child Reporting Act (325 ILCS 5/1 *et seq.*)
- f) Eye Protection in School Act (105 ILCS 115/0.01 *et seq.*)
- g) Toxic Art Supplies in Schools Act (105 ILCS 135/1 *et seq.*)
- h) Infectious Disease Policies and Rules (105 ILCS 5/10-21.11)
- i) Open Meetings Act (5 ILCS 120/1.01 *et seq.*)
- j) IL School Student Records Act (105 ILCS 10/1 *et seq.*)
- k) Conformance with the following paragraphs of the Agreement:
 - i) Paragraph 4.d., an open enrollment process and lottery,

- ii) Paragraph 4.1., the school's governance structure,
- iii) Paragraph 5.c., maintenance of corporate status and good standing,
- iv) Paragraph 5.g., the school's facility and ADA compliance,
- v) Paragraph 6.j., compliance with applicable sections of the Illinois Pension Code,
- vi) Paragraph 6.k., ongoing presence of management and financial controls, and
- v) Paragraph 8., maintenance of required insurance coverage.

In addition to the above items, the Board will also consider the Charter School's compliance with the Office of New Schools' compliance chart and the teacher qualification requirements in accordance with both the Charter Schools Law (Section 27A-10) and the requirements for Highly Qualified teachers under the No Child Left Behind Act (if the Charter School receives Title I funding). Failure to comply with either the compliance chart or the teacher qualification requirements shall affect the rating on the Legal Compliance Indicator.

When determining how to classify a Financial Management and Compliance Indicator, the Board may consider information from various sources including, but not limited to, audits, site visits, and information provided by other CPS departments, parents, or employees. If the audit states that there were material weaknesses or significant deficiencies found, the Board shall request from the Charter School the auditor's management letter and/or an opinion from a qualified, third-party professional regarding the importance of the finding. The Board shall also ask the Charter School to respond to the finding.

3. Charter School Participation in the Accountability Process

The Charter School shall take all necessary actions to collect and report the information required by this Accountability Plan for the Charter School overall and by each Attendance Center, if applicable, including, without limitation:

1. Full participation in the administration of all required student assessments, as the case may be, including all procedures designed to safeguard the integrity of the assessments;
2. Participation in site visits conducted by the Board to ascertain that sufficient, minimum educational and operational practices are in place;
3. An annual financial and compliance audit, as required by law, including but not limited to, the Single Audit Act Amendments of 1996 (31 U.S.C. §7501-07), OMB Circular A-133, and the compliance requirements set forth in OMB Compliance Supplement, and by the Agreement;

4. Provision of student, school, and employee information required by the Agreement and/or the Accountability Plan;
5. Submission and implementation of ADA Plan(s) for the Attendance Center(s) required by the Agreement;
6. Provision of information that is necessary to evaluate parent, student, employee, or public allegations or audit findings that, if true, would constitute a violation of the law or Agreement; and
7. Provision of additional information or cooperation in other actions not listed in this section necessary to evaluate the Charter School's performance with respect to the Financial Management and Compliance Categories.

4. Annual Performance Evaluation, Revocation and Renewal

The Board shall conduct an annual performance evaluation in which it holds the Charter School accountable in these Categories (Pupil Performance and Financial Management and Compliance) through the Indicators contained in this Accountability Plan. The Board shall give fair consideration to all Indicators for the current year in comparison to the previous years of the Charter School's history when conducting the annual performance evaluation and when acting to renew, not renew, or revoke the Charter School's charter.

The Board may act to revoke or to not renew a charter, in whole or as to any Attendance Center or campus, during the term of the Agreement in accordance with paragraphs 12 and 13 of this Agreement.

In all circumstances, the Board shall follow the requirements of the Charter Schools Law and its Agreement, including all due process requirements, regarding the processes required for revocation, renewal, and non-renewal.

When a charter is up for renewal, the charter's academic performance on the PRPP will be categorized as Meeting Standards, Making Reasonable Progress, or Failing to Meet Standards or Make Reasonable Progress. Similarly, the Financial Management and Compliance indicators will be analyzed to determine if violations of the Charter Schools Law have occurred.

MELISSA MEGLIOLA ZAIKOS

SUMMARY

Experienced K-12 executive with excellent track record of increasing academic performance. Strong record of developing school principals, implementing rigorous academic programs and driving individual student growth. Former business strategy consultant with results-oriented reputation for engaging stakeholders, building teams and applying rigorous analysis of data to complex, systems-wide challenges.

EDUCATION, FELLOWSHIPS & AWARDS

Broad Fellow

The Broad Fellowship for Education Leaders

2011

The Broad Residency in Urban Education

2005

Chicago Council on Foreign Relations, Emerging Leader

2009

Masters of Business Administration

2000

Harvard Business School, Boston, MA

Bachelors of Science in Industrial Engineering

1995

Texas A&M University, College Station, TX

Recipient of Buck Weirus Spirit Award – given by alumni association for campus leadership

1993

PROFESSIONAL EXPERIENCE

INTRINSIC SCHOOLS

2012 - Present

CEO

Chicago, IL

In early stage development of a new CMO that will rigorously personalize learning via both excellent teaching and adaptive technology to better prepare many more students for success in college and beyond. First school planned to open in 2013 with plans to open five schools by 2017.

CHICAGO PUBLIC SCHOOLS

2011-2012

Chief of Elementary Schools

Chicago, IL

Supervised network of 31 public elementary schools (K-8) serving 22,000 students in third largest urban district in the country (435,000 students). Network has 96% students of poverty, 30% English language learners, 15% African American, 69% Hispanic, 12% other and 4% Caucasian.

Organizational Leadership

- Recruited, supervised, and evaluated principals. Hired principals in coordination with local school councils. Assessor for district principal eligibility pool.
- Managed staff of 10 to support and monitor school improvement efforts including instructional leadership team support, teacher professional development and the creation of each school's theory of action.
- Served as lead instructional expert in the rollout of common core standards in English and math across all schools.
- Increased use of data to inform instruction and set individual student goals aligned with a school-wide Response to Intervention (RTI) plan.
- Carefully crafted succession plan over several months before accepting CMO opportunity in order to maintain continuity for schools. Deputy was selected and all network strategies remain in place.

CHICAGO PUBLIC SCHOOLS Chief Area Officer, Autonomous Zone

2005 – 2011
Chicago, IL

Supervised 97 schools serving 76,000 students. Area supervised included 18 high schools, 77 elementary schools (K-8), and two early childhood special education centers. Schools in the Autonomous Zone were granted additional decision-making authority around budget, instructional materials and programs based on past performance. Area had 71% students of poverty, 11% English language learners, 19% African American, 53% Hispanic, 8% Asian, and 19% Caucasian.

Organizational Leadership

- Served on superintendent's executive leadership team, providing input into system strategic goals, budget, and continuous improvement.
- Managed \$7 million departmental budget and staff of 10 people to support principals and build teacher instructional capacity.
- Introduced NWEA growth assessments across all elementary schools to measure impact of each school on individual student growth.
- Designed systemic approach for RTI including data models to identify students and customized support for schools to select and deliver appropriate interventions.
- Created a pipeline program for highest performing principals to develop them as district leaders resulting in seven promotions to district executive roles.

Major Accomplishments

- Increased the percent of students meeting standards from 68% to 87% over six years.
- Increased the percent of students exceeding standards from 16% to 28% over six years.
- Five schools awarded National Blue Ribbon Award, the most of any Chicago area.
- 70% of schools in the area are above the national average for growth in reading and 72% in math (measured by NWEA).
- Led the district with freshman on-track-for-graduation rate of 82%.
- Reduced the achievement gap between white and black students to 8.6% compared to district gap of 26%.
- Increased the number of students enrolled in college from 72.9% to 75.6%, largest area gain in the district.

Senior Project Manager

2003 - 2005

- Developed and managed district high school improvement strategy in 12 high schools. Resulted in rollout of new instructional materials, benchmark and summative assessments and coaching model for math, English and science.
- Secured largest grant ever given by the Bill and Melinda Gates Foundation directly to a public school district (\$21.3 million) as of 2006.
- Saved over \$5 million and improved the quality of services by developing a strategic sourcing plan for therapeutic day schools.
- Revamped paper Individual Education Plan (IEP) to on-line system.

DELOITTE CONSULTING

1995-1998 and 2001-2003

Manager, Strategy & Operations

Chicago, IL

- Promoted from Senior Consultant in 2002
- Led projects in strategic planning and operational improvement, primarily with large retail and consumer packaged goods, public sector, and non-profit clients.

DIAMONDCLUSTER INTERNATIONAL

2000-2001

Senior Associate

Chicago, IL

- Managed post-merger integration of two global professional services firms. Left after being recruited back to Deloitte Consulting.

PROFESSIONAL & COMMUNITY ACTIVITIES

- Executive Committee and Board Member, Cristo Rey Jesuit High School, 2008- present
- Board Member, Broad Center 2009-2010
- Harvard Public Education Leadership Program 2007
- Harvard Business School Club of Chicago, Statesman Dinner Chairman, 2005- 2007
- Ravinia Festival Associates Board , 2003-2007
- Joffrey Ballet Associates Board, 2001-2003
- Friends of Audubon Elementary School (parent organization)

PRESENTATIONS AND PUBLICATIONS

- Panelist, Deloitte All Analyst Summit, 2011
- Panelist, Broad Residency Orientation, Supervisor Orientation, Recruiting (2004-2011)
- Featured on WBEZ Radio (NPR) - *Chicago Tries Management-Style On Schools*, March 10, 2010
- Featured in *Education Week* - "Best Minds Sought for Central Office, Startups, " March 12, 2009
- Featured in the book, *The Secret of TSL: The Revolutionary Discovery that Raises School Performance*, William G. Ouchi, Simon & Schuster, 2009
- Featured in Harvard Business School Case Study "Managing the Chicago Public Schools", Dick Elmore, Allen Grossman, Caroline King, October 5, 2006
- Panelist, Kellogg Women Business Association Conference, 2005



Industry Experience

Intrinsic Schools	Chicago, IL	2013 – Present
Director of Finance and Operations		2012 – Present
<ul style="list-style-type: none">■ Work with CEO to develop strategic plan for a five school, 4,500 student charter management organization.■ Build systems and infrastructure for operational and financial activities of startup charter school.■ Lead facility acquisition, development, and financing activities.■ Manage day to day financial activities, including accounting, accounts payable, payroll, and cash management.■ Ensure financial sustainability through long-term strategic planning and financial modeling.		
Achievement School District	Nashville, TN	2012 – 2013
Director of Budget and Finance		2012 – 2013
<ul style="list-style-type: none">■ Led finance team and built financial infrastructure for state-wide startup school district.■ Built and managed budgets for three directly run schools and central office as well as providing financial oversight to three charter schools, with a total district budget of \$31 million.■ Led project team for selecting and implementing a new Enterprise Resource Planning solution.■ Ensured financial compliance across the district, including the U.S. DOE Race to the Top grant.		
Charter School Growth Fund	Broomfield, CO	2006 – 2012
Senior Investment Associate		2009 – Present
<ul style="list-style-type: none">■ Managed relationships across up to \$24.0 million in portfolio investments, including providing ongoing strategic support and ensuring performance against investment targets.■ Led due diligence and provided support developing strategic business plans and financial models on seven investment opportunities: \$6.3 million in investments, approximately \$9.0 million pending.■ Assisted in the development and implementation of CSGF's \$7.5 million facility financing fund: \$4.3 million in investments, approximately \$2.0 million pending.■ Assisted in the development of organization's first regional fund in Tennessee: \$14.0 million in government and private funding secured, first investment made June 2011.■ Worked with new CEO and existing staff to develop organization's five-year strategic business plan for a \$155 million core fund: launched in fall 2010, \$100 million raised as of June 2011, five investments executed.		
Associate, Analytics Team Manager		2008 – 2009
<ul style="list-style-type: none">■ Managed analytics team that produced all quantitative analysis for due diligence on 11 potential investments and portfolio management for 17 active investments.■ Developed and managed process for constructing and populating organization's first portfolio scorecard: analyzed performance against annual academic, financial, and growth milestones.■ Led and supported due diligence and strategic planning efforts: \$29.5 million in investments.■ Worked closely with Director of Quality Assessment to develop internal database for storing academic, financial, and operational data across the entire portfolio.		
Analyst		2006 – 2008
<ul style="list-style-type: none">■ Worked as organization's first analyst during initial launch of an \$87.0 million fund.■ Developed tools for assessing financial health, sustainability, and academic quality of charter operators.■ Supported due diligence and business planning efforts: \$31.7 million in investments.■ Led efforts for collecting annual data submissions from 16 investments and reporting results to funders.		

Brian Kates

Email: bkates@chartersgrowthfund.org

Wells Fargo Business Credit, Inc. Denver, CO

2004 – 2005

Business Analyst

- Trained for three months across all operational areas as organizations first intern, transitioning from intern into business analyst role.
- Analyzed financial statements and ensured proper financial reporting.
- Performed weekly and monthly assessments against loan covenants.
- Constructed new projection model to analyze pro forma financials.

Other Experience

2001 – 2005

-
- Controller and baker at startup bakery
 - Executive Assistant at startup grocery store
 - Intern to CFO at grocery store chain

Education

University of Denver

Denver, CO

August 2005

-
- M.S. Finance

University of Denver

Denver, CO

June 2004

-
- B.S. Business Administration and Finance with a minor in Leadership
 - Honors Program and Pioneer Leadership Program
 - Graduated Magna Cum laude with Honors

Skills

Finance

- Extensive experience building financial models for charter management organizations.
- Worked with over 40 charter operators to develop financial models for long-term growth.
- Analyzed financial health of over 40 charter operators nation-wide at various stages of maturity.

Analysis

- Extensive experience analyzing academic, financial, and operational performance of charter management organizations and single school operators.
- Experience developing databases and maintaining stored data for the purposes of data analysis.
- Extremely proficient in use of Excel as an analytics tool.

Strategic Planning

- Experience working with organization's in turnaround situations.
- Provided strategic and technical support to over 40 charter operators that were expanding or considering expansion, including: Board development, financial planning, fundraising, human resources, maintaining academic quality, market analysis, organizational structure, systems development, and risk mitigation.

Interests

- Distance Running: Road races to trail runs, 5K to Half Marathon
- Hiking: Colorado to New Zealand
- Volleyball: Sand and Grass
- Guitar: Rhythm only
- Singing: From rock bands to karaoke
- World Travel: Third-world to first-world

Suzanne Velasquez-Sheehy

7 [REDACTED] • e-mail: svelasquez@intrinsicsschools.org

EDUCATION

- January 2010 to Present **DEPAUL UNIVERSITY**, Chicago, Illinois
Doctoral Candidate in Educational Leadership-Dissertation in Progress
- Illinois Superintendent Certificate (Type 75)
- June 1998 **DEPAUL UNIVERSITY**, Chicago, Illinois
Masters of Arts in Education—Educational Leadership
- Illinois General Administrative Certificate (Type 75)
- June 1987 **UNIVERSITY OF ILLINOIS**, Champaign-Urbana, Illinois
Bachelor of Science Degree—Elementary Education
- Illinois Standard Elementary Certificate for grades K-9 (Type 03), Endorsements: Social Studies and Language Arts (Type 04), Early Childhood Certificate for Birth through Grade 3

PROFESSIONAL EXPERIENCE

- January 2013-Present **Intrinsic Charter Schools**, Chicago, IL
Principal
- * Founding member of a new charter school designed to serve students in grades 7-12
 - * Perform all duties as the building administrator/instructional leader as outlined by CPS Board Policy and ISBE State Standards for School Leaders; including articulating and promoting the school's vision, culture, and instructional programs
 - * Collaborate and communicate with school community stakeholders
- July 2008-January 2013 **LaSalle II Magnet School**, Chicago, IL
Principal
- * Opened a new magnet school and perform all duties as the building administrator as outlined by CPS Board Policy and ISBE State Standards for School Leaders
 - * Served as the Instructional Leader for over seventy-five faculty and staff members and six-hundred students
- February 2001-June 2008 **Henry R. Clissold Elementary**, Chicago, IL
Principal
- * Performed all duties as the building administrator as outlined by CPS Board Policy and ISBE State Standards for School Leaders
 - * Served as the Instructional Leader for over sixty faculty and staff members and six-hundred and fifty students
- November 1998-February 2001 **Seward Communication Arts Academy**, Chicago, IL
Assistant Principal
- * Assisted the principal with the daily operations of the building
 - * Observed classroom instruction and collected and analyzed data
 - * Communicated with parents, students, and community members
- June 1998-November 1998 **LAUNCH -LEADERSHIP ACADEMY AND URBAN NETWORK FOR CHICAGO**

- NORTHWESTERN UNIVERSITY**, Evanston, IL
- * Selected into the first group to participate in the six-week Leadership Academy for aspiring principals
- September 1992-June 1998 **Seward Communication Arts Academy**, Chicago, IL
Lead Teacher/Coordinator
- * Prepared State and Federal Program Designs, Amendments, and Budget Transfers
 - * Processed on-line requisitions, personnel documents, and monitored discretionary funds using the CPS mainframe system
 - * Coordinated Summer School and Extended-Day programs
 - * Facilitated Primary Team meetings and supervised 14 primary teachers
 - * Created and implemented a parent training program
- September 1989-June 1992 **Seward Communication Arts Academy**, Chicago, IL
Teacher
- * Third grade self-contained classroom teacher
 - * Pull-out reading/language arts teacher serving at-risk students
- September 1987-June 1989 **John Spry School**, Chicago, IL
Teacher
- * Language arts teacher serving at-risk students
- September 1987-June 1989 **Wright College**, City Colleges of Chicago, IL
Teacher
- * Developed and implemented an adult ESL course

OTHER DATA

- * 2011 Recipient of the AMPS Reading Award for having the highest percentage of student growth as measured on the NWEA Assessments
- * 2010 Recipient of AMPS Math and Reading Award for being one of the top schools for having the highest percentages of student growth as measured on the NWEA Assessments
- * Award Recipient for Principal of the Month, May 2002
- * Member, Association for Supervision and Curriculum Development
- * Member, Phi Delta Kappa
- * Member, Illinois Administrators Association
- * Member, St. Ignatius Parents Club
- * Member of the Board of Trustees, Saint Xavier University (2005-2008)
- * Member of the Board of Directors, Beverly Arts Center (2004-2008)

References furnished upon request

EDUCATION & CERTIFICATION-----

Master of School Leadership and Type 75 Certification, Chicago, IL, *May 2013*

- Concordia University

Illinois Gifted Education Certification, Illinois Association for Gifted Children, *May 2010*

National Board Certification, *November 2008*

- IL Master Teacher Certification: Early Adolescence/Mathematics, 2008 – 2018

Master of Science in Mathematics Education, Chicago, IL, *July 2007*

- Illinois Institute of Technology

IL Standard Secondary Teaching Type 09 certification, *September 2001*

- Mathematics (grades 6 – 12), Middle School Endorsement

Bachelor of Science in Education and Social Policy, Evanston, IL, *June 2001*

- Northwestern University, Concentration: Mathematics

EXPERIENCE & ACTIVITIES-----

Curriculum Coordinator, Intrinsic Schools, Chicago, IL • *April 2012 – Present*

- Served as the lead author on the academic vision in the Request for Proposal process
- Participate in key operational decision-making, including the hiring of faculty and staff
- Develop and provide on-going professional development support

Instructional Support Leader, Pershing Network, Chicago, IL • *July 2011 – April 2012*

- Facilitated EXPLORE®, Common Core Mathematics Standards, and Differentiated Math Instruction with NWEA data training for administrators and teachers
- Facilitated a network-wide Algebra Professional Learning Community
- Provided support for developing school-wide Response to Intervention (RtI) Plans

RtI Coordinator/Instructional Manager, Autonomous Schools, Chicago, IL • *Aug. 2010 – July 2011*

- Led Response to Intervention and Professional Learning Communities training for administrators and teachers
- Provided site-based support for RtI at 66 AMP Schools

Teacher, Whitney M. Young Magnet High School, Chicago, IL • *July 2005 – July 2010*

- Math Teacher – 7th grade, gifted and 9th grade Honors Algebra I, 10th grade Geometry
- Math Team Head Coach, Math Team Assistant Coach
- Community of Learners vertical (content-area)/horizontal (grade-level) team member
- Member of school-wide committees & district-wide (Chicago Math & Science) panels
- Mentor for a student observer from Northwestern University (2006 – 2007)
- National Junior Honor Society Faculty Council member (2005 – 2010)
- Certified SMART Technologies Peer Educator – Presented sessions to colleagues effective use of various instructional technologies
- Piloted and utilized mathematics software and devices in the classroom

Teacher, Global Visions Academy (Bowen H.S.), Chicago, IL • *August 2004 – July 2005*

- Math Teacher – 9th grade double-block of Algebra Problem-Solving
- Co-founder of the school's teacher/student mentoring program (G.O.A.L.S.)
- After-school math teacher for the Lighthouse Program, Peer Jury Co-Advisor
- Lead Presenter at the Chicago Small Schools Action Research Forum

Teacher, F. H. Tuttle Middle School, South Burlington, VT • *December 2001 – June 2004*

PR/Award # U282B130037

- Math Teacher – 6th/7th Grades and 7th/8th Grades Accelerated Math (Looping Classes)
- Creator and Director of an after-school math tutoring and homework program
- Yearbook Advisor (2002 – 2004)
- Partners for Equitable Schools Committee Member (2003 – 2004)
- FHTMS Above & Beyond Teacher of the Month (February 2003)
- Selected member of the district-wide Mathematics Vertical Team (2002 – 2003)
- Tutor for homebound and home-schooled students (2002 – 2003)

Research Assistant, Northwestern University, SESP, Evanston, IL • June 2000 – October 2000

- Assisted in an on-going research project studying the use of discourse as an effective instructional strategy in teaching mathematics (in 2nd, 3rd & 8th grade classrooms)

Golden Apple Scholar, Golden Apple Foundation, Chicago, IL • June 1997 – Present

- Assisted in the Golden Apple Scholar selection process (2006 and 2012)
- Taught at Hyde Park Career Academy, Summer Enrichment Program (1998)
- Taught at Oscar Mayer Elementary School, Summer Bridge Program (1997)
- Participated in summer seminars on effective teaching methodologies and reflective practice (1997 – 2000)

REFERENCES AVAILABLE UPON REQUEST-----

Marcos Alcozer

Director of Technology
for Intrinsic Schools

(312) 218-7834

malcozer@intrinsicsschools.org

Education

DePaul University, August 2004 to June 2006
Major: Computer Science

DeVry University, August 2006 to January 2007
Major: Network Systems Administration

Northeastern Illinois University, August 2009 to May 2010
Major: Computer Science

Work Experience

07/2013 to Present
Intrinsic Schools, Chicago IL
Director of Technology

08/04 to 07/07, and 05/08 to 07/2013
Northside College Prep High School, Chicago, IL
Technology Coordinator

Duties:

- Train faculty on various pieces of software and hardware
- Help teachers find tech solutions to their lesson plans
- Maintain a student TechCrew and work with the students for an hour every morning
- Implements and maintains webserver environment such as MySQL databases, IIS, PHP, etc.
- Troubleshoots phone issues and communicates problem to correct department to get issue resolved
- Preps Language Lab and proctors all AP tests that require a computer
- Maintains internship program to mentor college students on working in the technology field
- Maintains language lab by ensuring all computers, headsets, and specialized software is functioning as it should
- Maintains 20 individual desktop recording studios where students can create, edit, and master musical recordings
- Maintains Language Lab of 29 computers where a master console can network with student console to distribute digital media
- Maintains inventory of over 100 software titles that are installed throughout the building
- Software management
 - Creating custom images
 - Scripting of software updates
 - Troubleshooting software issues
 - Monitors software licensing
- Hardware management

- Inventory
- Adding/removing/recycling additional assets
- Troubleshooting LAN equipment such as printers, computers, scanners, faxes, and other peripherals
- Troubleshoots computers and printers and handles contacting technicians when repairs are necessary
- User management
 - Assigning of user security rights and setting share permissions
- Server management
 - Installed servers and implemented software for two file servers, backup infrastructure, PrintAudit Print Management Software and print server, DeepFreeze, Symantec Ghost, School Website, Moodle Class Management Software, DyKnow Collaboration and Monitoring Software, Microsoft SQL, MySQL

02/12 to Present
 Concordia Place
 Youth Mentor/Garden Consultant

Duties:

- Mentor 20 - 35 teens on a how to grow vegetables in two garden sites
- Teach topics such as seed starting, composting, storm water management, and nutrition

09/10 to 12/12
 Urban Habitat Chicago
 Staff

Duties:

- Site administrator for community gardens in Logan Square and Albany Park
- Web Committee during development and transition to new website
- Youth mentor after school at site in back of Northside College Prep High School

07/2007 to 05/2008
 Apple Inc
 Mac Genius

Duties:

- Provide customer service to consumers
- Troubleshoot computers, iPods, iPhones
- Diagnose software and hardware issues
- Repair desktop and notebook computers

CHARTER SCHOOLS PROGRAM ASSURANCES

NON-SEA APPLICANTS FOR PLANNING, PROGRAM DESIGN, AND IMPLEMENTATION

Pursuant to Section 5202(b) of the ESEA, an applicant for CSP funds that is not a State educational agency (SEA) must provide the following assurances.

As the duly authorized representative of the applicant, I certify that the applicant will submit to the Secretary:

- (a) All items described in the application requirements;
- (b) An assurance that the eligible applicant will annually provide the Secretary such information as may be required to determine if the charter school is making satisfactory progress toward achieving the objectives described in section 5203(b)(3)(C)(i) of the ESEA;
- (c) An assurance that the applicant will cooperate with the Secretary in evaluating the program assisted under this subpart;
- (d) A description of how a charter school that is considered a local educational agency under State law, or a local educational agency 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;
- (e) Proof that the applicant has applied to an authorized public chartering authority to operate a charter school and provided to that authority adequate and timely notice, and a copy, of this application; or an assurance that this application is for a precharter planning grant and the authorized public chartering authority to which a charter school proposal will be submitted has not been determined;
- (f) A copy of proof of applicant's non-profit status;
- (g) The applicants' DUNS and TIN numbers;
- (h) A statement as to whether or not an applicant for planning and implementation funding has previously received funding for this program either through a State subgrant or directly from the Department;
- (i) Such other information and assurances as the Secretary may require;
- (j) An assurance that the eligible applicant will use the funds to plan and implement a charter school in accordance with the Charter Schools Program; and
- (k) Assurances that the State educational agency will (i) grant, or will obtain, waivers of State statutory or regulatory requirements; and (ii) will assist each subgrantee in the State in receiving a waiver under section 5204(e) of the ESEA.

MATHEW SHAW
NAME OF AUTHORIZED OFFICIAL


SIGNATURE OF AUTHORIZED OFFICIAL

INTRINSIC SCHOOLS
APPLICANT ORGANIZATION

CONSULTANT
TITLE

7/11/13
DATE

7/11/13
DATE SUBMITTED

Budget Narrative File(s)

* **Mandatory Budget Narrative Filename:**

[Add Mandatory Budget Narrative](#)

[Delete Mandatory Budget Narrative](#)

[View Mandatory Budget Narrative](#)

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

[Add Optional Budget Narrative](#)

[Delete Optional Budget Narrative](#)

[View Optional Budget Narrative](#)

Intrinsic Schools
Budget Narrative

Personnel

	Year 1	Year 2	Year 3	Total
Curriculum Coordinator	75,000	75,000	50,000	200,000
Teachers & Master Teachers	35,000	35,000	35,000	105,000
Total	110,000	110,000	85,000	305,000

Intrinsic Schools is developing and implementing an instructional model that is highly dependent on the development of original curricular content and reliant upon new and innovative methods for instructional delivery. As such, we recognize the need to continuously evaluate, iterate and improve both the curricular content and instructional practices. This will be especially important in the first four years of the school’s existence as we grow from a 9th grade class of 186 students to a school of 890 students in grades 7-12 (the three years of this grant will impact the curriculum development for the school’s first four years). To this end, we have included a Curriculum Coordinator in our staffing plan. The Curriculum Coordinator’s annual salary is \$100,000 and she will devote 75% of her time to this project during the first two years and 50% of her time to this project in Year 3. At the end of this grant period the Curriculum

Coordinator's role will shift from focusing on curricular development and its implementation to assisting Intrinsic Schools in launching newly replicated charter schools.

As described in the proposal narrative, the Curriculum Coordinator will fill several key functions related to program and curriculum development and integration. These include:

- Creating and defining curriculum aligned to standards that requires students to design, create and iterate
- Training all staff on the process to design, create and iterate
- Evaluating, iterating and improving curricula, instructional practices and technology integration
- Evaluating, iterating and improving student assessment strategies
- Coordinating across all disciplines to help teachers frame their work around common essential questions
- Providing professional development to teachers in the use of data to inform the curricular design process

In addition, in each of the first three years, new faculty and Master Teachers will be working a full additional month to partner with the Curriculum Coordinator in the development of curricula and instructional methods for the upcoming school year. This request is to provide 6 teachers and 4 Master Teachers with a \$3,500 stipend each for the additional month of work for a total of \$35,000 per year. These activities will be critical as we expand from 9th grade only to the full complement of 7th-12th grade students.

Benefits

	Year 1	Year 2	Year 3	Total
Curriculum Coordinator	15,000	15,000	10,000	40,000

Benefits are calculated at a rate of 20% for the Curriculum Coordinator.

Contractual

	Year 1	Year 2	Year 3	Total
Data System Development Consultant	25,000			25,000
Recruitment and Hiring Consultant and Associated Expenses	20,000	20,000	20,000	60,000
Total	45,000	20,000	20,000	85,000

The Data System Development Consultant(s) will develop two systems during our first year of operations that are necessary to our long-term success. They will build:

- A multi-variable data model that will identify and predict students needing intervention and social services based on academic growth, academic attainment and behavioral data.

- A data system that will provide a standards-based view of how each student and the school as a whole is performing. This tool will provide a highly granular view of each student’s academic and non-academic skills and competences that will enable us to tailor each student’s instructional program to meet his or her individual needs.

The Recruitment and Hiring Consultant will play a critical role as we grow to scale and increase our total number of teachers from 7.5 in our first year to 33.5 in year four. During this period we will also increase our number of teacher aides from 3 to 15. The consultant will serve as the primary point of contact for job postings, candidate communication and follow-up. In addition, the \$20,000 budget includes the cost of utilizing a tool such as TeacherMatch , a research-based survey to predict the effectiveness of potential teachers to work in our innovative school model

Equipment

	Year 1	Year 2	Year 3	Total
Chrome Books	17,360	31,920	45,560	98,840
Tablets	12,400	22,800	35,400	70,600
Total	29,760	54,720	84,960	169,440

The equipment request is to ensure that every student in our school has both a chrome book and a tablet creating a 2:1 device:student learning environment. The grant funds will supplement the funds that we receive from the Chicago Public Schools (CPS) for the procurement of this equipment as the CPS funds are insufficient to meet our goal. We have budgeted \$280 per

chrome book and \$200 per tablet and plan to purchase 62 of each device in Year 1, 114 of each device in Year 2 and 177 of each device in Year 3.

Total Request

	Year 1	Year 2	Year 3	Total
Personnel	110,000	110,000	85,000	305,000
Fringe Benefits	15,000	15,000	10,000	40,000
Contractual	45,000	20,000	20,000	85,000
Equipment	29,760	54,720	84,960	169,440
Total	199,760	199,720	199,960	599,440

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

OMB Number: 1894-0008
Expiration Date: 04/30/2014

Name of Institution/Organization

Intrinsic Schools

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	110,000.00	110,000.00	85,000.00			305,000.00
2. Fringe Benefits	15,000.00	15,000.00	10,000.00			40,000.00
3. Travel						
4. Equipment	29,760.00	54,720.00	84,960.00			169,440.00
5. Supplies						
6. Contractual	45,000.00	20,000.00	20,000.00			85,000.00
7. Construction						
8. Other						
9. Total Direct Costs (lines 1-8)	199,760.00	199,720.00	199,960.00			599,440.00
10. Indirect Costs*						
11. Training Stipends						
12. Total Costs (lines 9-11)	199,760.00	199,720.00	199,960.00			599,440.00

***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):

The Indirect Cost Rate is %.

(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)? The Restricted Indirect Cost Rate is %.

Name of Institution/Organization

Intrinsic Schools

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 C - BUDGET NARRATIVE (see instructions)

ED Form No. 524

**U.S. DEPARTMENT OF EDUCATION
SUPPLEMENTAL INFORMATION
FOR THE SF-424**

1. Project Director:

Prefix:	First Name:	Middle Name:	Last Name:	Suffix:
	Melissa		Zaikos	

Address:

Street1:	4517 N. Artesian Ave
Street2:	
City:	Chicago
County:	
State:	IL: Illinois
Zip Code:	60625
Country:	USA: UNITED STATES

Phone Number (give area code)	Fax Number (give area code)
312-384-9903	

Email Address:

mzaikos@intrinsicsschools.org

2. Novice Applicant:

Are you a novice applicant as defined in the regulations in 34 CFR 75.225 (and included in the definitions page in the attached instructions)?

Yes No Not applicable to this program

3. Human Subjects Research:

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

Yes No

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

Yes Provide Exemption(s) #:

--

No Provide Assurance #, if available:

--

c. If applicable, please attach your "Exempt Research" or "Nonexempt Research" narrative to this form as indicated in the definitions page in the attached instructions.

	Add Attachment	Delete Attachment	View Attachment
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