

Charter Schools and Alternative Programs Committee Meeting
Monday, November 7, 2022 1:00 PM

Dr. Matthew Prophet Education Center -
Windows Cafeteria / Conference Room (Floor
2)
501 N. Dixon St.
Portland, OR 97227

Agenda

1. Welcome and Introduction of 2022-2023 Committee Members
2. School Facilities Update
3. Charter School New Application Process
4. Charter School New Application Evaluation Summary
5. Public Comment
 - To sign up for public comment email publiccomment@pps.net or call 503-916-3741

Charter Schools and Alternative Programs School Board Committee Meeting

November 7, 2022

Agenda

- Welcome and Introduction of 2022-23 Committee Members
- School Facilities Update
- Charter School New Application Process
- Charter School New Application Evaluation Summary



Multiple Pathways To Graduation:

**...Where EVERY student is
welcome, wanted and worthy**

Welcome and Introductions

Welcome and Introduction of 2022-23 Committee Members:

- Director Herman Greene, Committee Chair
- Director Michelle DePass, Member
- Director Eilidh Lowery, Member
- Jamal Gassaway, District Student Council Representative
- Bishop Murff, District Student Council Representative

Charter School Facilities Update

Charter School Facilities Update

- The Emerson School's current lease was due to expire on December 31, 2022; a new agreement has been reached to stay through June 30, 2022.
- After a 20-year search for a long-term facility, Emerson has identified a new facility and signed a 15-year lease + 5-year option.
- Expected occupancy of the new facility is September 2023.

Renderings of Emerson's new facility:



Charter School New Application

Process for Charter School New Application

Oregon Charter Law (ORS 338 and OAR 581) sets the statutory timelines and process for new charter school applications, and districts set specific due dates and formats:

- By May 1st: Letter of Intent is due to PPS Charter Schools Office
 - Received Letter from The Rhiza Schoolhouse Charter School for proposal
- July 15th: Charter School Application is due to PPS Charter Schools Office
 - Received Application from The Rhiza Schoolhouse Charter School July 15, 2022
 - District 30 days review for completeness (ORS 338.055, 338.075, OAR 581.026).
 - The initial application was found to be incomplete and returned for resubmission
 - Resubmitted application was found to be complete, notice sent to applicant **September 19**
- A public hearing must be held within 60 days of that notification (ORS 338.055), this hearing is scheduled for November 17, 2022

Process for Charter School New Application (cont.)

After the Public Hearing is held, the District has 30 days to hold a full board vote to approve or deny the proposal (ORS 338.055)

- Full board vote will occur at the **December 12, 2022** regular PPS Board of Education meeting
- IF School Board Votes to Approve THEN contract negotiations begin and the new charter school would be expected to open in September, 2023
- IF School Board Vote to Deny THEN the applicant is given the reasons for denial. The Applicant may choose to amend the proposal to address the concerns and resubmit the application to the School Board or may choose to accept reasons for denial.

Process for Charter School New Application (cont.)

After the Public Hearing is held, the District has 30 days to hold a full board vote to approve or deny the proposal (ORS 338.055)

Following a School Board charter school application denial:

- The board has 30 days to approve or deny the re-submitted proposal
- If the re-submitted proposal is denied, the applicant may follow the appeal process

Charter School New Application Evaluation Summary

- The Rhiza Schoolhouse Charter School application was reviewed by a multi disciplinary team of District staff. The team was comprised of Multiple Pathways to Graduation staff, including Charter School staff, the Budget Office, Research, Assessment and Accountability, and Racial Equity and Social Justice.
- The Application Review Summary is provided. Alone, the summary does not constitute a recommendation. The summary rather informs questions to be asked at the public hearing.
- The Superintendent's final decision to either recommend or reject the proposal will be based on information gathered throughout the entire review process.

Charter School New Application Evaluation Summary, cont.

- The application review is completed using statutory criteria defined by ORS 338.055(3) and ORS 338.945(3):
 - The demonstrated, sustainable support for the public charter school by teachers, parents, students and other community members, including comments received at the public hearing.
 - The demonstrated financial stability of the public charter school, including the demonstrated ability of the school to have a sound financial management system that is in place at the time the school begins operating and that meets the requirements of ORS 338.095 (1).
 - The capability of the applicant, in terms of support and planning, to provide comprehensive instructional programs to students pursuant to an approved proposal.
 - The capability of the applicant, in terms of support and planning, to specifically provide, pursuant to an approved proposal, comprehensive instructional programs to students identified by the applicant as academically low achieving.

(Review Criteria, continued)

- The adequacy of the information provided as required by ORS 338.045 (2) and (3). (This section of the application includes information required by the district in the application process that is in addition to the minimum information specified in statute, which is permitted by ORS 338.045(3).).
- Whether the value of the public charter school is outweighed by any directly identifiable, significant and adverse impact on the quality of the public education of students residing in the school district in which the public charter school will be located.
- Whether there are arrangements for any necessary special education and related services for children with disabilities pursuant to ORS 338.165

(Review Criteria, continued)

- Whether there are alternative arrangements for students and for teachers and other school employees who choose not to attend or who choose not to be employed by the public charter school.
- The prior history, if any, of the applicant in operating a public charter school or in providing educational services

Charter School New Application Evaluation Summary, cont.

The Application Review Team notes the following appreciations:

- A great deal of work has gone into submitting a completed Charter School Application addressing all the criteria in ORS 338.
- The Rhiza Schoolhouse Charter School application shows a deep appreciation of Montessori education and a commitment to making an educational option that is often only available in private schools available through a public school option.

Charter School New Application Evaluation Summary, cont.

- The Application Review Team identified three of the nine sections as “does not meet” criteria, and six of the sections as “nearly meets” criteria. None of the nine sections were found to “meet” criteria.
- Particular areas of concern are:
 - Section 2: Demand for the Program
 - Section 4: Instructional Program
 - Section 5: Educational Program for Academically Low-Achieving Students
- Summary table below (Application Review Summary, p.34):

Charter School New Application Evaluation Summary, cont.

<u>Section</u>	<u>Maximum Points</u>	<u>Total Points</u>	<u>Determination</u>
Section 1: General Information (17%)	39	31.5	<input type="checkbox"/> Meets (33-39) <input type="checkbox"/> Nearly Meets (27-32) <input type="checkbox"/> Does Not Meet (0-26)
Section 2: Demand for the Program (9%)	21	10.8	<input type="checkbox"/> Meets (18-21) <input type="checkbox"/> Nearly Meets (15-17) <input type="checkbox"/> Does Not Meet (0-14)
Section 3: Financial and Organizational Plan (17%)	39	29.5	<input type="checkbox"/> Meets (33-39) <input type="checkbox"/> Nearly Meets (27-32) <input type="checkbox"/> Does Not Meet (0-26)
Section 4: Instructional Program (24%)	54	35.8	<input type="checkbox"/> Meets (46-54) <input type="checkbox"/> Nearly Meets (38-45) <input type="checkbox"/> Does Not Meet (0-37)
Section 5: Educational Program for Academically Low-Achieving Students (3%)	6	3.7	<input type="checkbox"/> Meets (5-6) <input type="checkbox"/> Nearly Meets (4) <input type="checkbox"/> Does Not Meet (0-3)
Section 6: Additional Information Required by the District (19%)	42	29.3	<input type="checkbox"/> Meets (36-42) <input type="checkbox"/> Nearly Meets (29-35) <input type="checkbox"/> Does Not Meet (0-28)
Section 7: Value vs. Adverse Impact (4%)	9	6.0	<input type="checkbox"/> Meets (8-9) <input type="checkbox"/> Nearly Meets (6-7) <input type="checkbox"/> Does Not Meet (0-5)
Section 8: Special Education (3%)	6	4.3	<input type="checkbox"/> Meets (5-6) <input type="checkbox"/> Nearly Meets (4) <input type="checkbox"/> Does Not Meet (0-3)
Section 9: Prior History (4%)	9	6.5	<input type="checkbox"/> Meets (8-9) <input type="checkbox"/> Nearly Meets (6-7) <input type="checkbox"/> Does Not Meet (0-5)
TOTAL	225	157.5	

Next steps in process

- The public hearing for The Rhiza Schoolhouse Charter School is scheduled for November 17, 5:00-6:30pm. The hearing format includes a presentation from the Applicant, public testimony in support and in opposition, and time for the Board Committee to ask questions of the Applicant.
- Based on the information shared in the Application Review Summary, suggested questions will be developed and shared with the Applicant in preparation for the public hearing.

Questions





Board of Education Informational Report

MEMORANDUM

Date: November 7, 2022

To: Charter Schools and Alternative Programs Committee, Board of Education

From: Korinna Wolfe, Area Senior Director, Multiple Pathways to Graduation
Tara O'Neil, Program Director, Charter Schools

Subject: Application for New Charter School

This memorandum provides a brief explanation of the charter school application process and criteria.

Charter school applications are reviewed and evaluated according to ORS 338.045 and 338.055, OAR 581-020-0301 and 581-020-0321, and Board policy 6.70.010. After the application is determined to be complete, a team of staff reviewers reads and evaluates the application according to set criteria. The Board then holds a public hearing for the applicant. The information gathered throughout the application process serves to inform the Superintendent's recommendation and Board decision to approve or deny the application.

The Rhiza Schoolhouse Charter School submitted an application for a new charter school on July 15, 2022. The application was reviewed for completeness under OAR 581-020-0301. After the initial finding of incomplete and subsequent resubmission, the application was determined to be complete. The applicant was notified of this determination on September 19, 2022. The application was then reviewed by a team of district staff and a charter school representative using the criteria in ORS 338.055. A summary of this review is included in the November 7, 2022 work session materials for the PPS Board Charter Schools and Alternative Programs Committee (Application Review Summary, Rhiza Schoolhouse). The applicant was provided a copy of this review on November 3, 2022. The applicant's public hearing as required by ORS 338.055 will be held on November 17, 2022. Within 30 days of the public hearing, the PPS Board will vote to approve or deny the application.

According to ORS 338.055(3) and ORS 338.045(3), the following criteria are to be used when evaluating a charter school application for approval or denial:

- a) The demonstrated, sustainable support for the public charter school by teachers, parents, students and other community members, including comments received at the public hearing.
- b) The demonstrated financial stability of the public charter school, including the demonstrated ability of the school to have a sound financial management system that is in place at the time the school begins operating and that meets the requirements of ORS 338.095 (1).

- c) The capability of the applicant, in terms of support and planning, to provide comprehensive instructional programs to students pursuant to an approved proposal.
- d) The capability of the applicant, in terms of support and planning, to specifically provide, pursuant to an approved proposal, comprehensive instructional programs to students identified by the applicant as academically low achieving.
- e) The adequacy of the information provided as required by ORS 338.045 (2) and (3). (This section of the application includes information required by the district in the application process that is in addition to the minimum information specified in statute, which is permitted by ORS 338.045(3).).
- f) Whether the value of the public charter school is outweighed by any directly identifiable, significant and adverse impact on the quality of the public education of students residing in the school district in which the public charter school will be located.
- g) Whether there are arrangements for any necessary special education and related services for children with disabilities pursuant to ORS 338.165.
- h) Whether there are alternative arrangements for students and for teachers and other school employees who choose not to attend or who choose not to be employed by the public charter school.
- i) The prior history, if any, of the applicant in operating a public charter school or in providing educational services.

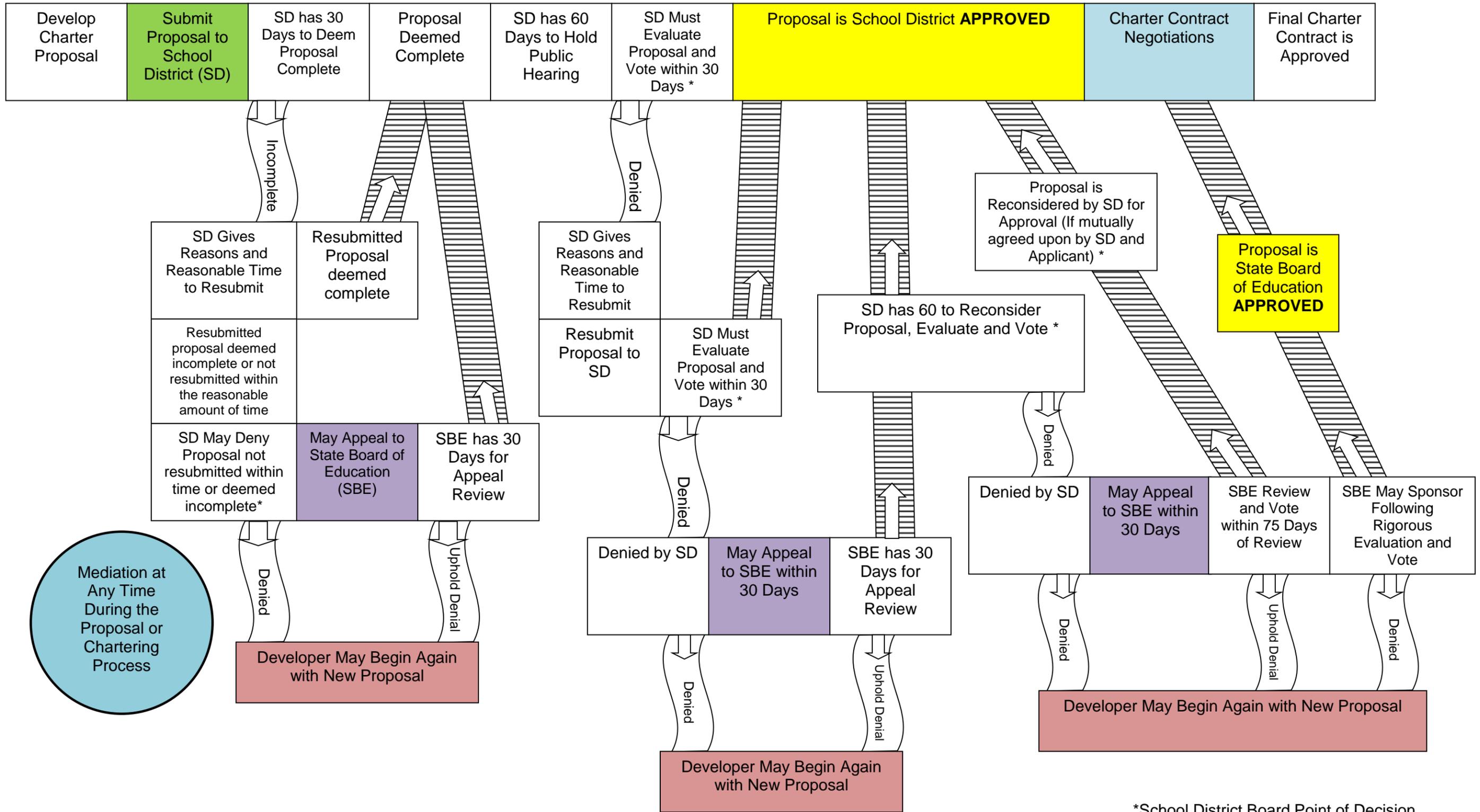
The rubric used to evaluate charter school applications is aligned to the criteria specified in ORS 338.055(2). Possible determinations for each category of questions are: Meets, Nearly Meets, and Does Not Meet. The final page of the Application Review Summary will indicate the ratings of each section in the application.

The Application Review Summary provides the basis for the applicant's public hearing and serves to inform the questions that the Board Committee may ask at the hearing. **This review alone does not constitute a recommendation.** The Superintendent will consider the ad-hoc Application Review Committee's summary report and the information gathered from the public hearing and then make a recommendation to the full Portland Public Schools Board of Education, which will vote to approve or deny the charter school proposal.

The final decision to either recommend or reject the proposal will be based on information gathered throughout the entire review process.

Oregon Public Charter School Proposal Process

ORS 338.055, 338.075 and OAR 581-026



Oregon Public Charter School Proposal Process

ORS 338.055, 338.075 and OAR 581-026

1. Developer submits charter school proposal to school district.
 - a. District has 30 days to deem proposal complete:
 - i. District deems proposal complete. Move to step 3.
 - ii. District deems proposal incomplete, gives reasons and reasonable time to resubmit.
 1. No proposal is resubmitted. Developer may begin again with a new proposal. Process complete.
 2. Resubmitted proposal is deemed complete. Move to step 3.
 3. Resubmitted proposal is deemed incomplete or not resubmitted within the reasonable amount of time.
 - a. District may deny proposal not resubmitted within time or deemed incomplete. Process complete or move to step 2.
2. Developer may appeal denial to the State Board of Education.
 - a. State Board has 30 days to review the appeal to:
 - i. Uphold denial.
 1. Developer may begin again with a new proposal. Process complete.
 - ii. Deem proposal as complete and remand to the district for evaluation. Move to step 3.
3. District has 60 days to hold a public hearing regarding a complete proposal. Move to step 4.
4. District must evaluate and vote on the proposal within 30 days of the public hearing.
 - a. District votes to approve the proposal. Move to step 7.
 - b. District denies proposal, gives reasons and a reasonable time to resubmit.
 - i. No proposal is resubmitted. Developer may begin again with a new proposal. Process Complete.
 - ii. Resubmitted proposal is received within reasonable time. District has 30 days to evaluate and vote on the proposal.
 1. District votes to approve the proposal. Move to step 7.
 2. District denies proposal. Process complete or move to step 5.
5. Developer may appeal denial to the State Board of Education.
 - a. State Board has 30 days to review the appeal to:
 - i. Uphold denial.
 1. Developer may begin again with a new proposal. Process complete.
 - ii. Remand the proposal to the district for evaluation. District has 60 days to reconsider, evaluate and vote.
 1. District votes to approve the reconsidered proposal. Move to step 7.
 2. District denies reconsidered proposal. Process complete or move to step 6.
6. Developer may appeal denial to the State Board of Education within 30 days.
 - a. State Board has 75 days to review the appeal to:
 - i. Uphold denial.
 1. Developer may begin again with a new proposal. Process complete.
 - ii. Remand the proposal to the district for reconsideration if mutually agreed upon by the district and the developer.
 1. District votes to approve the reconsidered proposal. Move to step 7.
 - iii. Consider approving the proposal:
 1. State Board votes to approve the proposal. Move to step 7.
 2. State Board denies the proposal. Developer may begin again with a new proposal. Process Complete.
7. Proposal has been approved by the district or the State Board. Contract negotiations begin and a charter contract is executed.

PPS Public Charter School Proposal Review Criteria: 2022

Applicant:

THE RHIZA SCHOOLHOUSEReviewer: Combined Application Review Team Averages**Background**

Oregon's Public Charter School Law was enacted in May 1999. It provides an opportunity for teachers, parents, and community members to "create new, innovative, more flexible ways of educating all children within the public school system." ORS 338.015. To implement the charter school law, the Portland Public Schools Board of Education adopted its Charter School Policy 6.70.010-P.

Review Process Components

The review process considers information required by ORSs 338.045 and 338.055 and District Policy 6.70.010-P and includes the following components:

1. A review of the proposal by an ad hoc committee composed of those with expertise in areas relevant to the charter proposal. This review will consist of:
 - An overall analysis by each reviewer with general impressions of the application.
 - Each reviewer's analysis of the section(s) of the proposal that are in their area(s) of expertise.
 - Each reviewer's numerical score of each section of the application and an average of those scores for each category, based on a three-point rubric of Meets, Nearly Meets, or Does Not Meet.
 - **3 = Meets:** The application addresses the section criteria with responses that adequately demonstrate the applicant's ability to successfully start and operate a charter school. Applicant demonstrates a clear understanding of the requirements of charter schools, as per relevant Oregon Revised Statutes and Oregon Administrative Rules, PPS Board policy regarding charter schools, and current PPS strategic initiatives in school system design. Applicant addresses the topic with specific evidence that shows thorough preparation and presents a clear, realistic picture of how the school intends to operate. Very little additional information or data is necessary.
 - **2 = Nearly Meets:** The application sufficiently addresses most of the section criteria, but does not provide adequate detail in the responses. Applicant provides some relevant data and/or information, but key data or informational points may be missing or flawed. The application lacks meaningful detail or requires additional information in one or more key areas.
 - **1 = Does Not Meet:** The application does not address the section criteria in adequate detail and/or the responses demonstrate the applicant's inability to successfully start and operate a charter school. The applicant provides insufficient data and/or information to support assertions in the proposal, or uses flawed or misleading data and/or information. The applicant demonstrates a lack of knowledge of the requirements of charter schools, as per relevant Oregon Revised Statutes and Oregon Administrative Rules and/or lack of preparedness to open and operate a charter school. The applicant's responses raise substantial concerns about the applicant's ability to implement an effective educational,

financial, and/or organizational plan.

2. A structured interview with representatives of the applicant group if the ad hoc staff committee feels it is necessary. The purposes of such an interview are to:
 - Clarify information already provided.
 - Probe for greater understanding of the applicant's proposal.
 - Assess the capacity of the applicant group to start and successfully operate the proposed charter school.
3. The Charter Schools Program Director may request additional information from the applicant during the review process. However, additional information will not be considered unless requested by the Charter Schools Program Director.
4. After its review, the ad hoc team's individual reviews will be compiled to form a team review, which will be the basis of the applicant's public hearing. **This review alone does not constitute a recommendation.** The Superintendent will consider the ad hoc staff committee's report and the information gathered from the public hearing and then make a recommendation to the full Portland Public Schools Board of Education, which will vote to approve or deny the charter school proposal.

The final decision to either recommend or reject the proposal will be based on information gathered throughout the review process.

Section 1: General Information

- o **3 = Meets:** The application addresses the section criteria with responses that adequately demonstrate the applicant’s ability to successfully start and operate a charter school. Applicant demonstrates a clear understanding of the requirements of charter schools, as per relevant Oregon Revised Statutes and Oregon Administrative Rules, PPS Board policy regarding charter schools, and current PPS strategic initiatives in school system design. Applicant addresses the topic with specific evidence that shows thorough preparation and presents a clear, realistic picture of how the school intends to operate. Very little additional information or data is necessary.
- o **2 = Nearly Meets:** The application sufficiently addresses most of the section criteria, but does not provide adequate detail in the responses. Applicant provides some relevant data and/or information, but key data or informational points may be missing or flawed. The application lacks meaningful detail or requires additional information in one or more key areas.
- o **1 = Does Not Meet:** The application does not address the section criteria in adequate detail and/or the responses demonstrate the applicant’s inability to successfully start and operate a charter school. The applicant provides insufficient data and/or information to support assertions in the proposal, or uses flawed or misleading data and/or information. The applicant demonstrates a lack of knowledge of the requirements of charter schools, as per relevant Oregon Revised Statutes and Oregon Administrative Rules and/or lack of preparedness to open and operate a charter school. The applicant’s responses raise substantial concerns about the applicant’s ability to implement an effective educational, financial, and/or organizational plan.

Narrative Questions	Comments (including references from the application)
<p>1. States the projected enrollment to be maintained and the ages or grades to be served when the school is fully enrolled.</p>	<p>There is a stated concern that the planned enrollment of 80 students for the first 2 years of operation is not reasonable as a sustainable number of students for the purposes of fiscal stability. (Opal School was able to sustain with 88 students due to having a facility provided rent-free, and significant percentage of teachers’ salaries paid by umbrella organization.)</p> <p>Unclear if enrollment of 158 is fully at capacity or will expansion continue past year 6. Unclear on # of students per grade at years with enrollment increases (shows increase in mixed-grade classrooms but information was not presented by grade level)</p>
<p>2. Describes the target population of students the public charter school will be designed to serve.</p>	<p>Underserved by race was indicated but no additional information about the targeted population, needs, range of ability, etc.</p> <p>The term “underserved” is extremely vague and general. Not enough detail to</p>

	<p>be able to assess if the school is prepared to serve with fidelity the population they intend to target nor, in the future is this description of their desired population enough information to assess if the applicant, if approved, is serving the targeted population in a quality way.</p>
<p>3. States the legal address, facilities and physical location of the public charter school, if known. If not known, states the region within Portland Public Schools District boundaries the charter applicant intends to locate the charter school.</p>	<p>No indication as to how a site will be procured or how it would be fiscally feasible before they open. Where and how would capital be raised to lease, rent or purchase a site in one of the most highly demanded geographical regions of N or NE Portland?</p> <p>The N/NE Portland region has numerous existing charter schools, and specifically this area has a PK-8 grade Montessori education model charter school. Furthermore, due to gentrification, underserved families are more and more having to move out of the North and Northeast area of Portland and target population may not be concentrated in this area.</p>
<p>4. Describes the rationale for selecting the location and targeting the specified population.</p>	<p>Location of N, NE Portland is selected for access for underserved community, however region also encompasses high income, privileged population - how will outreach be designed to balance or overcome that disparity? Current demographic information reflects movement of concentration of historically underserved students and families to East Portland region due to effects of gentrification. Question why the selection of this region when there is an existing public charter pk-8 Montessori school already in N Portland, and an existing culturally specific charter school serving Black and other historically underserved students in N Portland (~550 students served by these two charter schools).</p> <p>Little demonstration of awareness of the socio/political context with white parents using a new public Montessori as opt out vs. families of color accessing this program. Has the target population expressed a need or desire for this program? What is the rationale for this program with the target population?</p>

<p>5. Describes how the location and facilities will accommodate the school’s operations and the targeted student population, including students or staff with disabilities, and meet state and district standards for schools.</p>	<p>An explanation of where the facility will be located is not an adequate answer for how the potential school will accommodate the targeted population. Additionally, response does not adequately address staff/students with disabilities.</p>
<p>6. Describes the plan to provide for any future space needs.</p>	<p>Building not yet identified, doesn’t address the uncertainty in Portland real estate market, a known barrier for charter schools. Building code for school occupancy (E-rated) is very specialized; E -rated space within Portland is extremely difficult to come by.</p> <p>No real details or plan around scalability and no mention of money needed to do so.</p> <p>Note - the suggested choice of a satellite building as an option during growth would require more staff which would have impacts on the budget/financial status of the school.</p>
<p>7. Provides a description of proposed admission policies and application procedures.</p>	<p>The application states that the “admissions policy will attract, enroll, and retain students...representative of N/NE communities of Portland” but leaves the reviewer unable to determine how that will be accomplished.</p>
<p>7a. Includes a description of the proposed lottery procedures and how they will comply with statutory requirements (ORS 338.125).</p>	
<p>8. Assures the school’s compliance with all statutes and rules that shall apply to the public charter school, all applicable district policies and administrative directives and procedures, and its cooperation with district staff at all levels.</p>	<p>Statement of compliance but it’s not clear there is understanding of all applicable laws and policies beyond ORS 338 (including all federal law, state law, applicable District policies, etc.)</p> <p>No detail around Board structure and policies for oversight. No specific plan or previous expertise. There is not enough evidence that the applicant understands the requirements and rules of running a charter school.</p>

9. States the date upon which the public charter school would begin operating.	
10. States the requested term of the proposed charter.	

Exhibits	Comments
Exhibit I: Table is completed and the methods used to collect the data are well described.	Table is complete but some information is misleading or incorrect. A pk-8 public Montessori charter school already exists in Portland, in the same region the applicant hopes to locate. Methods include data taken from wait lists for most recently renewed charter schools, which are based on different programs, with known track records and 10+ year history of operation. Does not compare to what would be expected for an untested new charter school program. Also, wait list data used was pre-pandemic, since then enrollment has declined and wait lists have reduced district-wide.
Exhibit II: 1. The calendar provided includes the length of the school day and school year. 2. The applicant describes how the proposed calendar and hours of instruction meet or exceed the minimum annual hours of instruction required by grade levels.	Proposed year-round schedule poses challenges regarding coordination with PPS Special Education staff who must provide services to students with IEPs. -School day shows 1hr lunch/recess break only (no snack break or add'l recess?) -Unclear if "Explore and Experience Studies" (EES) weeks are teacher-led and if it will count toward instructional hours -Calendar shows a religious holiday (Easter Monday), privileges one religion with a day off as well as holiday name, consider renaming. -Calendar shows 2 public employee holidays (MLK and Juneteenth) as work days, not sure public employers can compel working on these holidays - should those be volunteer only?
SECTION TOTAL: 31.5 (maximum possible = 39)	

Section 2: Demand for the Program

Statutory criteria: ORS 338.055(3)(a): *The demonstrated, sustainable support for the public charter school by teachers, parents, students and other community members.*

- o **3 = Meets:** The application addresses the section criteria with responses that adequately demonstrate the applicant’s ability to successfully start and operate a charter school. Applicant demonstrates a clear understanding of the requirements of charter schools, as per relevant Oregon Revised Statutes and Oregon Administrative Rules, PPS Board policy regarding charter schools, and current PPS strategic initiatives in school system design. Applicant addresses the topic with specific evidence that shows thorough preparation and presents a clear, realistic picture of how the school intends to operate. Very little additional information or data is necessary.
- o **2 = Nearly Meets:** The application sufficiently addresses most of the section criteria, but does not provide adequate detail in the responses. Applicant provides some relevant data and/or information, but key data or informational points may be missing or flawed. The application lacks meaningful detail or requires additional information in one or more key areas.
- o **1 = Does Not Meet:** The application does not address the section criteria in adequate detail and/or the responses demonstrate the applicant’s inability to successfully start and operate a charter school. The applicant provides insufficient data and/or information to support assertions in the proposal, or uses flawed or misleading data and/or information. The applicant demonstrates a lack of knowledge of the requirements of charter schools, as per relevant Oregon Revised Statutes and Oregon Administrative Rules and/or lack of preparedness to open and operate a charter school. The applicant’s responses raise substantial concerns about the applicant’s ability to implement an effective educational, financial, and/or organizational plan.

Narrative Questions	Comments (including references from the application)
<p>1. <u>Not</u> including individuals involved in the development of the charter school proposal, explains how educators, families, and community members demonstrated and continue to demonstrate sustainable levels of support for the proposed charter school.</p>	<p>Insufficient response, not enough detail provided to indicate or assess sustainable levels of support.</p> <p>Applicant indicates “we <i>will</i> reach out...” and “further outreach <i>will</i> be done...” but proposal is already submitted, no further involvement in development of proposal is possible.</p> <p>Application lists 25 names in a table but provides no indication of who is an educator, community member, or family, or how those on list have demonstrated support already, or how they continue to demonstrate sustainable levels of support.</p>
<p>2. Describes the manner in which community groups will be</p>	<p>Application does not show evidence of any community group involvement in</p>

<p>involved in the planning and development process of the public charter school.</p>	<p>the planning already or describe any process currently available. States “we <i>will</i> plan to connect with community...”</p> <p>The applicant mentions that the developers “can be an earpiece for desires and needs from a school to help build the environment and school that they need”. This comment demonstrates a lack of understanding that the proposed school needs to already be designed and developing prior to submitting the application. Getting community feedback and incorporating it into the design of the school needs to happen at the time of the creation of the application and there needs to be a detailed explanation in the materials submitted to the district of how the school would meet the ‘desires and needs’ the community has already expressed in their demand for the school.</p> <p>No indication as to whether the people they canvased were students or families of color, or if they have reached out to community groups from their targeted population.</p>
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<p>3. In consideration of the following goal from the PPS Racial Educational Equity Policy:</p> <p>“The District shall welcome and empower families, including underrepresented families of color (including those whose first language may not be English) as essential partners in their student’s education, school planning and District decision-making. The District shall create welcoming environments that reflect and support the racial and ethnic diversity of the student population and community. In addition, the District will include other partners who have demonstrated culturally-specific expertise -- including government agencies, non-profit organizations, businesses, and the community in general -- in meeting our educational outcomes.”</p>	<p>Response does not indicate a firm action plan:</p> <ul style="list-style-type: none"> a. No evidence that underrepresented families or community members have contributed to this application. The applicant states they will “...build the school that fits their needs” but how will that happen if they aren't involved at this stage? Does the applicant have any previous experience or success doing this? The applicant does not answer the question of how the proposed school will partner with the district. b. Members of the groups referenced don’t appear to be involved in the proposal to this point. Applicant states “Further outreach <i>will be</i> done...” and “We <i>will</i> reach out...” but the proposal is complete already, how will that be remedied? How do we ensure that the well-intentioned application is not creating a school that is not needed, welcomed, or has the unintentional impact of serving only white/affluent students who would otherwise be attending a private
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<ul style="list-style-type: none"> a. Explains how the charter school, acting in partnership with the District, would help meet this goal. b. Explains how the groups described in the goal support the development of the proposed charter school. c. Explains how the groups described in the goal above have been engaged in the development of this proposal to help mitigate negative impact on underrepresented families of color. 	<p>Montessori program?</p> <ul style="list-style-type: none"> c. There is no evidence that there has been any community engagement in the development of the proposal, indicating no input to mitigate negative impact on underrepresented families of color. Why hasn't outreach been done already? What experience do the applicants have in doing this? Do the current founders or board members come from the communities the school aims to serve? <p>Responses discuss future efforts to engage the groups described in the equity policy but are not very descriptive of how those groups are already demonstrating support as requested in parts b and c of this item.</p>
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Exhibits	Comments
<p>Exhibit III:</p> <ul style="list-style-type: none"> 1. Table is completed and the methods used to collect the data are well described. Samples or templates are attached to the exhibit. 2. Explains how the data from Exhibit III provides quantifiable data demonstrating sufficient demand for the proposed charter school from teachers, parents, students, and other community members. 	<p>Survey sample size does not provide quantifiable evidence of sufficient demand for program. Application includes 6 survey responses representing 7 students, 4 of whom will be of age to attend school in 2023-24 (when school intends to enroll 80 students).</p> <p>Data from Exhibit III does not show sufficient demand from teachers, parents, students and community members.</p> <p>No specific association to the targeted students or population they wish to serve. There does not appear to be sufficient community demand for this program to be sustainable.</p>

<p>Exhibit IV: Provides completed parent/family surveys. Evidence of parent and student support must represent students who will be in the grade levels served during the proposed term of the charter. Parent/family surveys include at minimum:</p> <ul style="list-style-type: none"> a. the number of potential students in each household; b. where the student(s) attend(s) school currently; c. the student’s current grade. 	<p>Surveys are included with the required information, but there are so few surveys submitted that the data does not meet the criteria. Those that were submitted did not convey overwhelming support.</p> <p>The applicant intends to start with 80 students. They provided 6 completed surveys of interest representing 7 potential students, only 4 of whom will be of school age in the proposed first year of operation. There are simply not enough surveys to provide evidence of sustainable support and no indication as to how this is from the community they aim to serve. No data that indicates a strong need or demand for this particular program in this area serving underserved communities of color.</p> <p>Insufficient evidence of thorough efforts to collect survey data from enough families or, if that effort was made, data reflects a lack of interest from community.</p>
<p>Exhibit V: Table is complete, specific, and the methods used to collect the data are well described; copies of materials used to collect information are included.</p>	<p>Table lists only the two founders, no other individuals involved; does not list experience and qualifications in the areas of expertise assigned to each. Table does not indicate support by educators or community members. States “<i>pending approval, further outreach will be done...</i>” and “<i>we will reach out to community members...</i>” but the work has not yet been done. Support and demand for the school is not provided nor demonstrated adequately. No information as to how they will involve the community it will serve or that there is anyone with previous experience doing so.</p> <p>There is no indication that school can be operationalized based on the current level of involvement from individuals, committees, or community groups.</p>
<p>Exhibit VI: At least three current letters of reference are attached for each person and/or organization listed in Exhibit V. Letters are from people</p>	<p>Letters of reference are provided but are not directly relevant. For Director role, references do not speak to educational or organizational qualifications</p>

<p>familiar with the subject’s educational and organizational experience.</p>	<p>that indicate the capacity to lead a school. For Educational Consultant, letters speak to teaching experience, but it is unclear how the Consultant position will function within the teaching environment at the school as a consultant. All but one of the references are located out of state.</p> <p>The letters did not speak to specific operational experience with educational centers of learning or experience working with underserved communities. Few specific qualifications for this work are indicated.</p>
<p style="text-align: right;">SECTION TOTAL: 10.8 (maximum possible = 21)</p>	

Section 3: Financial and Organizational Plans

Statutory criteria: ORS 338.055(3)(b): *The demonstrated financial stability of the public charter school, including the demonstrated ability of the school to have a sound financial management system that is in place at the time the school begins operating and that meets the requirements of ORS 338.095 (1).*

- o **3 = Meets:** The application addresses the section criteria with responses that adequately demonstrate the applicant’s ability to successfully start and operate a charter school. Applicant demonstrates a clear understanding of the requirements of charter schools, as per relevant Oregon Revised Statutes and Oregon Administrative Rules, PPS Board policy regarding charter schools, and current PPS strategic initiatives in school system design. Applicant addresses the topic with specific evidence that shows thorough preparation and presents a clear, realistic picture of how the school intends to operate. Very little additional information or data is necessary.
- o **2 = Nearly Meets:** The application sufficiently addresses most of the section criteria, but does not provide adequate detail in the responses. Applicant provides some relevant data and/or information, but key data or informational points may be missing or flawed. The application lacks meaningful detail or requires additional information in one or more key areas.
- o **1 = Does Not Meet:** The application does not address the section criteria in adequate detail and/or the responses demonstrate the applicant’s inability to successfully start and operate a charter school. The applicant provides insufficient data and/or information to support assertions in the proposal, or uses flawed or misleading data and/or information. The applicant demonstrates a lack of knowledge of the requirements of charter schools, as per relevant Oregon Revised Statutes and Oregon Administrative Rules and/or lack of preparedness to open and operate a charter school. The applicant’s responses raise substantial concerns about the applicant’s ability to implement an effective educational, financial, and/or organizational plan.

Narrative Questions	Comments (including references to the application)
<p>1. Describes the governance structure of the public charter school.</p>	<p>Incomplete response - Does not give enough information to assess adequate understanding of how a non-profit board operates effectively. No description of the governance structure was provided.</p>
<p>2. Explains how the board was established and how it supports the school’s mission, governance, racial and cultural equity, community outreach efforts, and fiscal stability.</p>	<p>Does not explain how the board was established, how were board members found and selected? The language about equity and community outreach is all in future tense. No indication that board is leading racial equity and community outreach to targeted population. How does the board currently support these efforts? Will the board be fundraising? How is board supporting fiscal stability?</p>

	The description of how the board will support the mission lacks detail and specifics about how they will achieve serving the underserved effectively. No reference to racial, socio economic, linguistic or ability diversity of recruitment efforts. Does not speak about Board vetting process.
3. Describes the plan to train and recruit board members.	States there will be an orientation process, but what will it be? How will they recruit? Response is vague, lacks assurance that the Board will fulfill goals related to who the school aims to serve.
4. Explains how the directors' roles are different from the school administrators' roles.	Response lacks detail, specificity and context, demonstrating potential lack of understanding as to what the disparate functions of each group is. What is board role in hiring and managing the School Administrator?
5. Describes any advisory or other board committees and how they will relate to the school's board and administration.	Incomplete, does not list any committees, though later in the application there is reference to committees, and the by-laws list committees. How will coordination between committees and full board be managed? There are no specifics about potential advisory members and lack of clarity about how Board or advisory members will have to be leveraged for fundraising/resources.
6. Describes the manner in which the program review and fiscal audit will be conducted.	Gives prescribed language based on ORS but no actual clarity around the process for school review or fiscal management or responsibility. Would like to see more detail.
7. Describes the plan for performance bonding or insuring the public charter school, including buildings and liabilities.	Gives prescribed language based on ORS but no actual clarity or plan around insurance.

Exhibits	Comments
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<p>Exhibit VII: Budget is complete, reasonable, and financially sound. All narrative questions are answered thoroughly.</p>	<p>It is not clear from Exhibit IX qualifications, do the school director and board treasurer have finance experience? There are general financial concerns indicating budget is not reasonable or financially sound:</p> <ul style="list-style-type: none"> -Pre-operational budget revenue doesn't appear to be secured (fundraising through GoFundMe and grant from organization that has no record of giving in OR, with current granting directed at schools serving underserved students being led by people from those communities; also loan from organization that bases loans to charter schools on enrollment - how will such a loan be secured pre-enrollment?) -Pre-operational budget includes paying staff stipend but not payroll tax/PERS associated. -Operational budget depends on full enrollment, under enrollment of even 10 students leaves budget at a loss -Operational budget includes licensed teacher salaries of \$40k/yr and Assistants \$25k/yr, with no health benefits until yr 3 - does not seem realistic or reasonable -Operational budget has School Admin PERS/FICA/SUI miscalculated (over estimated by ~\$43k) -appears to have copied amounts from Instructional Staff calculations -Application states intent to be part of Nat'l School Lunch Program (NSLP) but shows no revenue or expenses related to school lunch -Questions about equity and inclusion/accessibility for enrollment partnering with Schola.com - how do families know to look there for the school? Who does the service "push out" to as prospective school families? Would like to see demographics information of families that have successfully enrolled at schools through schola.com. -The planned 5% contingency fund will not cover any significant unplanned expense or reduction in enrollment -Audit cost under-estimated at \$750. Most schools spend \$6,000-\$9,000. -Utilities estimated low at \$250/mo (sewer, water, garbage, power) for 8800sf space. Likely to average \$1200-\$1500/mo, <p>Budget raises questions around viability, sustainability, and having enough</p>
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	start-up money considering real estate costs, and initial low enrollment risk.
<p>Exhibit VIII: Financial plan includes the following components:</p> <ul style="list-style-type: none"> a. Financial management systems are described. b. There is a description of how the financial management system will meet the requirements of ORS 398.095(1). c. There is a plan for having the financial management systems in place at the time the school begins operating. The role/title of the individual(s) responsible for the implementation and operation of the financial management system is provided. d. There is evidence that the systems and procedures in the proposed financial and business plan follow general accounting procedures. e. There is evidence that the proposed budget and financial plan for the public charter school are financially sound. 	<p>Concerns expressed in the following sections:</p> <ul style="list-style-type: none"> c. concern regarding separation of duties in accounting system. Person with access to making entries in QuickBooks must be separate from person with approval/check-signing/bill-paying responsibilities. e. There is not sufficient evidence that the proposed budget for the school is financially sound. <p>Narrative indicates there are some “pledges” secured but no details – what are the pledges and how are they secured? Reliance on fundraising and one or two grants for start-up year is not reliable. Management system lacks description. Raises concerns regarding financial soundness.</p>
<p>Exhibit IX: The board of directors and their terms are listed; their qualifications are well described.</p>	<p>Directors are listed but qualifications are not well described (current or past occupations are given), unclear how directors are qualified to oversee and govern a charter school and provide stewardship of public funds.</p> <p>-Concern that all Directors terms expire the same year rather than being staggered. Indicates lack of awareness of standard board policies.</p> <p>No Board members with school leadership or oversight experience. No indication as to how the current board members represent the community that the school aims to serve, or prospective parents/community members of future students.</p>
<p>Exhibit X: A completed Acknowledgment of Understanding is attached for each person named in Exhibit IX.</p>	<p>Note – there is a last name mismatch between Exhibit IX for Thea Henderson, signed acknowledgement is for Thea Klever.</p>
<p>Exhibit XI: The bylaws are attached, reasonable, and comprehensive.</p>	
<p>Exhibit XII: Applicant provides evidence of 501(c)(3) status or documentation of the ongoing application process.</p>	

SECTION TOTAL: 29.5 (maximum possible = 39)

Section 4: Instructional Program

Statutory criteria: ORS 338.055(3)(c): *The capability of the applicant, in terms of support and planning, to provide comprehensive instructional programs to students pursuant to an approved proposal.*

For all questions: If replicating or using an existing program, the applicant provides data showing the program’s measurable effects on students’ academic achievement.

- o **3 = Meets:** The application addresses the section criteria with responses that adequately demonstrate the applicant’s ability to successfully start and operate a charter school. Applicant demonstrates a clear understanding of the requirements of charter schools, as per relevant Oregon Revised Statutes and Oregon Administrative Rules, PPS Board policy regarding charter schools, and current PPS strategic initiatives in school system design. Applicant addresses the topic with specific evidence that shows thorough preparation and presents a clear, realistic picture of how the school intends to operate. Very little additional information or data is necessary.
- o **2 = Nearly Meets:** The application sufficiently addresses most of the section criteria, but does not provide adequate detail in the responses. Applicant provides some relevant data and/or information, but key data or informational points may be missing or flawed. The application lacks meaningful detail or requires additional information in one or more key areas.
- o **1 = Does Not Meet:** The application does not address the section criteria in adequate detail and/or the responses demonstrate the applicant’s inability to successfully start and operate a charter school. The applicant provides insufficient data and/or information to support assertions in the proposal, or uses flawed or misleading data and/or information. The applicant demonstrates a lack of knowledge of the requirements of charter schools, as per relevant Oregon Revised Statutes and Oregon Administrative Rules and/or lack of preparedness to open and operate a charter school. The applicant’s responses raise substantial concerns about the applicant’s ability to implement an effective educational, financial, and/or organizational plan.

Narrative Questions	Comments (including references to the application)
1. Provides a description of the philosophy and mission of the public charter school	Nothing about equity or social justice in their mission statement, does not include anything about the target population the school wants to serve.
2. Describes the curriculum of the public charter school and any distinctive learning or teaching techniques to be used.	Describes curriculum as Montessori approach, but what are the materials - are there books? workbooks? what do students and teachers work with? No specificity about core content knowledge. Even though Montessori is a different approach, no specificity of learning targets or academic outcomes

	discussed.
<p>3. Provides a description of the expected results of the curriculum and the verified methods of measuring and reporting objective results that will show the growth of knowledge of students attending the public charter school, and allow comparisons to be made with other public schools.</p>	<p>Does not describe a method of measuring achievement and growth such that comparisons can be made to other public schools. Application states plans for using PPS report cards, but as students would not be attending a PPS school, they will need to use a school-specific report card. Individual student report cards do not provide data that can be compared to other public schools. Applicant does not seem to understand types of data needed for school-to-school comparisons.</p>
<p>4. Describes how the charter school will ensure that:</p> <ul style="list-style-type: none"> a. Students meet growth targets b. Students meet subgroup growth targets c. Students meet all associated standards using Oregon or federal accountability assessments in English/Language Arts, Mathematics, Writing, Science, and participation at grades 3-8 and 9-12, and attendance at all grades, where applicable. 	<ul style="list-style-type: none"> a. doesn't address growth targets, data cited is about achievement not growth b. doesn't address methods or approach to ensure subgroup growth - cites a study but doesn't answer question c. doesn't address methods/how students will meet standards, just that they will evaluate results of OSAS for intervention (doesn't detail what interventions will be applied) <p>Some of the response to part b. makes reference to outdated federal and state assessment expectations. Students in all grades 3-8 are expected to participate in state assessments. These summative state tests are not designed for monitoring student growth, other assessments are more appropriate to that purpose.</p> <p>Response gives no detail about how this school will ensure the meeting of growth targets. No specific growth targets mentioned. No reference to PPS's Racial Equity/Social Justice (RESJ) mission which calls out an intentional focus on Black and Native Students. Additionally, no local data is referenced, which would show an understanding of the local population they wish to serve. It sounds like the response is simply restating that the Montessori model does this without a description of how it is done or any extra steps that are taken when students are not making adequate growth.</p>

<p>5. Explains how the proposed curricula, methods, and materials are based on sound and effective models or approaches that will result in increased learning and achievement for all students</p>	<p>Response meets criteria, but does not address how the proposed model will be effective for increasing learning for the target population.</p>
<p>6. Explains how the instructional program will support students of all races and ethnicities in meeting state content standards and benchmarks.</p>	<p>Relies heavily on Montessori model as the answer without additional supports - cites individual attention to each child, looping with teacher, “diverse teachers,” and culturally responsive teaching but does not list specific supports, or address meeting state content standards by race.</p> <p>Lacks specificity about how the “instructional program will support students of all races and ethnicities.” How is the pedagogy culturally responsive? How will the school recruit and retain “diverse teachers?”</p>
<p>7. Explains how the proposed charter school will offer students comprehensive instruction (where applicable) in English Language Arts and Literacy, Science, Literacy in Science and Technical Subjects, Health Education, Arts, Mathematics, Educational Technology, Social Sciences, Literacy in History and Social Studies, World Language, and Physical Education that meets the academic content standards adopted by the State Board of Education and meets other requirements adopted by the State Board of Education and the board of the public charter school.</p>	<p>No specifics to content standards or how Montessori model can be translated to ensure the meeting of those standards specifically for their target population.</p>
<p>8. Explains how the instructional program and curriculum will be designed to be culturally responsive, and to close achievement and opportunity gaps specific to race and poverty.</p>	<p>Response doesn’t mention race or poverty and does not answer the question. Response discusses concept of storytelling and social interaction in Montessori classrooms, but doesn’t discuss how curriculum will be designed to close opportunity/achievement gaps specific to race and poverty. “Recognition that not all students are the same” does not equate to a plan to close the achievement gap.</p> <p>What are some examples of the unique opportunities the school will provide to make home/school/community connections? Need more detail and explanation about what instructional strategies will be implemented to close gaps.</p>

<p>9. Explains how culturally relevant curriculum will be integrated into instruction at all levels.</p>	<p>Response relies heavily on “caring” educators, stating “lessons...will be designed to be culturally responsive...” but not specifying how.</p>
<p>10. Explains how this charter school proposal will help meet the following strategic objectives (where applicable).</p> <ul style="list-style-type: none"> a. Enter first grade: Ready to read – i.e., evidence of reading readiness by the school’s internal local assessments. b. End of third grade: Reading to learn – Students meet or exceed state benchmarks on ELA assessments. c. Middle years: Ready for high school – i.e., student attendance is 90% or greater, students meet or exceed state benchmarks on ELA assessments, and students take and pass 8th grade algebra. d. Enter 10th grade: On track to graduate – i.e., students complete 9th grade with 6 credits and not lower than a C grade in core subjects. e. 12th grade: Graduating on time, ready for college and career. 	<p>Response includes limited detail, mainly repeating question points; relies heavily on Montessori method without describing how (how does the Montessori curriculum do that?). There is a lack of instructional strategies, lack of detail about spiraling curriculum/ skills, etc. Raises concerns about instructional leadership preparedness and expertise.</p>
<p>11. Explains how this charter school proposal will minimize barriers to equal access and meet the needs of all students.</p>	<p>Not answered, relies on Montessori method as the answer, not answering how.</p>
<p>12. Explains how school performance data will allow comparisons with other public schools.</p>	<p>Response lacks clarity. Individual student report cards will not allow comparisons with other public schools, applicant doesn’t appear to understand school-to-school data comparisons.</p>

<p>13. Explains how the instructional program will be differentiated or otherwise designed and implemented to meet the needs of students who are English Language Learners.</p>	<p>Doesn't explain how, no specific examples. Not sure the requirements of an ELL Plan and associated assessment is understood</p>
<p>14. Explains how the instructional program will be differentiated or otherwise designed and implemented to meet the needs of students who are identified as Talented and Gifted.</p>	<p>(Note - charter schools are not required to provide TAG testing or services by law, however they can choose to do so.)</p>
<p>15. Explains how the proposed charter school will address the Oregon legislature's goals for charter schools in ORS 338.015:</p> <ul style="list-style-type: none"> a. Increase student learning and achievement. b. Increase choices of learning opportunities for students. c. Better meet individual students' academic needs and interests. d. Build stronger working relationships among educators, parents, and other community members. e. Encourage the use of different and innovative learning methods that are not already provided by the district. f. Provide opportunities in small learning environments for flexibility and innovation, which may be applied, if proven effective, to other public schools. g. Create new professional opportunities for teachers. h. Establish additional forms of accountability for schools. i. Create innovative measurement tools. 	<ul style="list-style-type: none"> b. doesn't address the question, there is already a k-8 Montessori charter school in Portland, 3 charter schools, and numerous PPS k-5 lottery-based schools of choice in the same region of N and NE Portland. d. doesn't discuss a working relationship with parents e. incorrect info, does not address that the learning method is already available at another charter school in Portland h. addresses accountability for students through self-assessments, but not for the school i. does not provide a thorough response

Exhibits	Comments
Exhibit XIII: Provides the plan of service for English Language Learners.	Does not include an ELL Plan, incorrectly states ELL testing will be administered by District; raises concern about lack of experience with ELL students and processes.
Exhibit XIV: Provides a plan for serving students that qualify under Section 504 of the Rehabilitation Act of 1973.	Does not include a 504 Plan, appears to confuse 504 with IEP. Do the applicants clearly understand the difference between the two and have a plan that appropriately addresses 504 as distinct from IEP in the context of IDEA?
Exhibit XV: <ol style="list-style-type: none"> 1. Shows the alignments of the proposed curriculum and selected instructional materials to state-adopted content and performance standards at the grade levels to be served. 2. Explains the reason(s) for selection of the curriculum and instructional materials. 	
SECTION TOTAL: 35.8 (maximum possible = 54)	

Section 5: Educational Program for Academically Low-Achieving Students

Statutory criteria: ORS 338.055(3)(d): *The capability of the applicant, in terms of support and planning, to specifically provide, pursuant to an approved proposal, comprehensive instructional programs to students identified by the applicant as academically low-achieving.*

- o **3 = Meets:** The application addresses the section criteria with responses that adequately demonstrate the applicant’s ability to successfully start and operate a charter school. Applicant demonstrates a clear understanding of the requirements of charter schools, as per relevant Oregon Revised Statutes and Oregon Administrative Rules, PPS Board policy regarding charter schools, and current PPS strategic initiatives in school system design. Applicant addresses the topic with specific evidence that shows thorough preparation and presents a clear, realistic picture of how the school intends to operate. Very little additional information or data is necessary.
- o **2 = Nearly Meets:** The application sufficiently addresses most of the section criteria, but does not provide adequate detail in the responses. Applicant provides some relevant data and/or information, but key data or informational points may be missing or flawed. The application lacks meaningful detail or requires additional information in one or more key areas.
- o **1 = Does Not Meet:** The application does not address the section criteria in adequate detail and/or the responses demonstrate the applicant’s inability to successfully start and operate a charter school. The applicant provides insufficient data and/or information to support assertions in the proposal, or uses flawed or misleading data and/or information. The applicant demonstrates a lack of knowledge of the requirements of charter schools, as per relevant Oregon Revised Statutes and Oregon Administrative Rules and/or lack of preparedness to open and operate a charter school. The applicant’s responses raise substantial concerns about the applicant’s ability to implement an effective educational, financial, and/or organizational plan.

Narrative Questions	Comments (including references to the application)
1. Explains how the instructional program will be differentiated or otherwise designed and implemented to meet the needs of academically low achieving students.	Response relies heavily on Montessori method alone addressing needs, students working at their “own pace,” not how it will be applied differently to academically low achieving students.
2. Describes the academic and other supports that will be available for students identified as academically low-achieving.	Doesn’t sufficiently explain how, or what additional supports will be available.
SECTION TOTAL: 3.7 (maximum possible = 6)	

Section 6: Additional Information Required by the District

Statutory criteria: *ORS 338.055(3)(e): The adequacy of the information provided as required by ORS 338.045(2) and (3).*

- o **3 = Meets:** The application addresses the section criteria with responses that adequately demonstrate the applicant’s ability to successfully start and operate a charter school. Applicant demonstrates a clear understanding of the requirements of charter schools, as per relevant Oregon Revised Statutes and Oregon Administrative Rules, PPS Board policy regarding charter schools, and current PPS strategic initiatives in school system design. Applicant addresses the topic with specific evidence that shows thorough preparation and presents a clear, realistic picture of how the school intends to operate. Very little additional information or data is necessary.
- o **2 = Nearly Meets:** The application sufficiently addresses most of the section criteria, but does not provide adequate detail in the responses. Applicant provides some relevant data and/or information, but key data or informational points may be missing or flawed. The application lacks meaningful detail or requires additional information in one or more key areas.
- o **1 = Does Not Meet:** The application does not address the section criteria in adequate detail and/or the responses demonstrate the applicant’s inability to successfully start and operate a charter school. The applicant provides insufficient data and/or information to support assertions in the proposal, or uses flawed or misleading data and/or information. The applicant demonstrates a lack of knowledge of the requirements of charter schools, as per relevant Oregon Revised Statutes and Oregon Administrative Rules and/or lack of preparedness to open and operate a charter school. The applicant’s responses raise substantial concerns about the applicant’s ability to implement an effective educational, financial, and/or organizational plan.

Narrative Questions	Comments (including references to the application)
<p><u>Supports for Learning</u></p> <p>1. Describes the key employment requirements and qualifications for each staff position listed below. Includes an explanation of how all teachers in core subjects will be qualified per requirements of Every Student Succeeds Act (ESSA).</p> <ul style="list-style-type: none"> a. Teachers. (Include qualifications for serving ELL, TAG, SpEd, etc.) b. Teaching assistants. c. Counselors. d. Principals, directors, managers, and any other administrators. If any administrators have been identified or selected, provides their names and qualifications. 	<p>Educational Consultant is listed as employee, will that position be regular employee or contractor? Not clear that the difference between “staff” and “contractor” is understood as relates to employment law.</p> <p>Required qualifications for teachers seem very robust (OR Licensure, Montessori Certified, ELL endorsed, with second language preferred), how will that mesh with desire to have racially diverse staff representing the community they are serving? Will the school have an applicant pool when considering low salary and no health benefits in budget?</p> <p>Name of Director is identified, it is not clear that the qualifications listed for the position are met by the identified individual. Director has been a Montessori student but has not been a Montessori teacher (or any k-8 classroom</p>

<p>e. Support staff. f. Others.</p>	<p>teacher) or had Montessori school leadership experience. Not sure that qualifies as “Montessori experience” identified in position qualifications.</p>
<p>2. Explains how professional development needs will be identified and met for teachers and teaching staff.</p>	<p>PD for teachers described as fully teacher directed - will there be mandatory training in equity/culturally responsive teaching or other subjects related to target population whether or not teachers identify it as an area of interest?</p>
<p>3. Explains how professional development needs will be identified and met for administrators, support staff, and other staff.</p>	<p>There is no specific plan of PD for an inexperienced Administrator - states “will be provided” but not what. Various schoolwide PD opportunities are cited, not Admin-specific. Concern there is no mention of racial equity/community engagement PD for school leader – where is that expectation being set to best serve the target population?</p>
<p>4. Describes the plan for providing professional development specifically focused on racial equity and cultural responsiveness.</p>	<p>Director will seek out specific racial equity PD, not yet identified; response does not mention alignment with meeting the needs of the target population.</p>
<p>5. Explains the plan for providing child nutrition.</p>	<p>States plan to apply as a Nat’l School Lunch Provider, but not how meals will be provided to meet required guidelines, who will administer the program, and there is no associated line item in budget. Many unanswered questions, no details provided.</p>
<p>6. Explains the plan for providing transportation.</p>	<p>Does not provide a plan for supporting students/families who cannot drive to the school but live outside easy bike or walk range, specifically for target student population.</p>
<p>7. Explains the plan for providing co-curricular activities (if any).</p>	<p>Unclear if these are activities that are during the school day and accessible to all, or after school activities - is sign-up required? how is equity of access assured? Unclear if PE is offered after school only?</p>
<p>8. Explains the plan for providing counseling (if any).</p>	<p>Application states they will work with PPS to provide counseling plans; the charter school would need to develop these plans independently from PPS.</p>

<p><u>Performance and Accountability</u></p> <p>1. States the school’s specific annual student performance goals, as defined by the school. Explains how they are measurable for the proposed term of the charter.</p>	<p>Goal is stated as 100% proficient or advanced in ELA and Math as measured by state assessments. While 100% meeting benchmark on state assessments is an aspirational goal, it is not a reasonable or meaningful goal in the first few years of operation as state assessments are administered beginning in 3rd grade, with multiple data points not available until after the first few years of operation. Response uses old accountability language (AYP), are applicants familiar with current federal and state accountability expectations and reporting?</p>
<p>2. States the school’s other specific goals. Explains how they are measurable. (Examples might include goals for parent involvement or staff training or professional development.)</p>	<p>Response specified how goals are measured but does not set specific goals, only areas for goals. What are the targets for each of these?</p> <p>Parent involvement goals includes one required school attendance day per year; how does this consider access/equity for working parents or those with young children at home (the requirement privileges those with flexible work schedules, access to childcare, and stay-at-home parents)?</p>
<p>3. Explains the school’s plan to use student and school performance data to inform and adjust its education program, supports for learning, and school improvement plan.</p>	
<p>4. Describes how the charter school will provide its students equal access to participation in its programs or activities.</p>	<p>Unclear on after-school plan and if special exploratory weeks are optional/sign-up or if they are all-school, where all students must participate.</p>

Exhibits	Comments
<p>Exhibit XVI: Provides the marketing and recruitment plan. Explains how the plan is:</p> <ul style="list-style-type: none"> a. Consistent with the school’s mission and goals. b. Specifically designed to reach the school’s target 	<p>Marketing plan does not speak to outreach in historically underserved communities, organizations, events. Many/most of the proposed outreach activities will likely capture middle-class white families and not the target population stated in application. Plan is not consistent with mission of serving</p>

<p>population(s). c. Specifically designed to provide equity of access to all students.</p>	<p>“the underserved.” How is the plan designed to reach the target population? Plan involves use of Schola.com as an enrollment service. Does Schola.com ensure equity of access to all? Does not explain how recruitment is done through Schola to reach the target population. What is Schola.com’s record in enrolling students in the applicant’s target population into schools they serve?</p>
<p>Exhibit XVII: Provides the following policies: A. Student application and admission B. Student withdrawal C. Student promotion and retention D. Standards for student behavior, including: i. Discipline of students ii. Discipline of students with disabilities iii. Suspension of students iv. Expulsion of students E. Student attendance, including: i. Excused absences ii. Unexcused absences iii. Vacations iv. Tardiness F. Homework G. Bullying and harassment H. Admission of students expelled from other districts and/or schools I. Volunteers J. Field trips K. Staff and student technology and internet use L. Emergency management and training (includes a Healthy & Safe Schools Plan) M. Allowable fees/fines to be charged to families N. Every Student Belongs O. Any other policies relevant to the mission of the charter school</p>	<p>Many of the stated policies are more of an outline rather than a fleshed-out policy. More detail and thoughtfulness is needed in responses. Numerous policies state they will use PPS policies, even so it will be necessary for the school to take ownership of that policy and adopt it as an individual school policy, including tailoring language and processes as appropriate to suit the individual school’s staff and community. A-Some misunderstandings of statute and which do or do not apply to charter schools. Sibling policy as stated in admissions policy is not accurate to law. C-Would like to see acknowledgement of disability/racial equity factors considered in retention decisions. Includes “special needs” as potential criteria to retain without referencing involvement of IEP team, understanding the impact of disability, or IDEA requirements. D- Statute cited related to suspensions and expulsions doesn’t apply to charter schools, but a charter school can choose to follow it. Will need to develop and adopt internal school process rather than PPS process due to specific PPS departments and positions referenced in policy. E. Policy needs further definition (10-day drop if on vacation? will school hold spot for student? etc.) G-References a Code of Conduct Handbook but does not provide the Handbook. K-Cites following PPS policies, but those are very PPS specific. References District network and IT supports not available to charter schools. Would need</p>

	<p>to adopt policy specific to charter school.</p> <p>L-Lists assurances that laws will be followed but does not include policies or handbooks referenced (Emergency Preparedness Handbook, Student-Family Handbook). Does not include a Healthy and Safe Schools Plan as required.</p> <p>M-Brief response, not a policy (what fees will be charged? will there be waivers for economically disadvantaged? etc)</p> <p>N-Statement of compliance, but not a policy.</p>
<p style="text-align: right;">SECTION TOTAL: 29.3 (maximum possible = 42)</p>	

Section 7: Value vs. Adverse Impact

Statutory criteria: ORS 338.055(3)(f): Whether the value of the public charter school is outweighed by any directly identifiable, significant and adverse impact on the quality of the public education of students residing in the school district in which the public charter school will be located.

- o **3 = Meets:** The application addresses the section criteria with responses that adequately demonstrate the applicant’s ability to successfully start and operate a charter school. Applicant demonstrates a clear understanding of the requirements of charter schools, as per relevant Oregon Revised Statutes and Oregon Administrative Rules, PPS Board policy regarding charter schools, and current PPS strategic initiatives in school system design. Applicant addresses the topic with specific evidence that shows thorough preparation and presents a clear, realistic picture of how the school intends to operate. Very little additional information or data is necessary.
- o **2 = Nearly Meets:** The application sufficiently addresses most of the section criteria, but does not provide adequate detail in the responses. Applicant provides some relevant data and/or information, but key data or informational points may be missing or flawed. The application lacks meaningful detail or requires additional information in one or more key areas.
- o **1 = Does Not Meet:** The application does not address the section criteria in adequate detail and/or the responses demonstrate the applicant’s inability to successfully start and operate a charter school. The applicant provides insufficient data and/or information to support assertions in the proposal, or uses flawed or misleading data and/or information. The applicant demonstrates a lack of knowledge of the requirements of charter schools, as per relevant Oregon Revised Statutes and Oregon Administrative Rules and/or lack of preparedness to open and operate a charter school. The applicant’s responses raise substantial concerns about the applicant’s ability to implement an effective educational, financial, and/or organizational plan.

Narrative Questions	Comments (including references to the application)
<p>1. Explains why a public charter school was selected as the desired educational option for the grade levels and target population(s). Compares and contrasts the charter school option to other options already available in the district.</p>	<p>Does not compare/contrast adequately to the other k-8 Montessori charter school in Portland. Does not differentiate the proposed program from the program already offered at the existing k-8 Montessori charter (The Ivy School). The applicant hopes to offer summer training for Montessori teachers, which would primarily benefit students at private Montessori schools nationwide, and could be done separately from a public charter school environment.</p> <p>Offering a public option that competes with a similar public option is likely going to be detrimental to enrollment numbers rather than helpful. This may be especially true given the lack of evidence of interest in this particular school offering.</p>
<p>2. Describes the proposed plan for the placement of public charter</p>	

<p>school teachers, other school employees and students of the public charter school upon termination or nonrenewal of the charter.</p>	
<p>3. Describes how and where enrollment trends of district schools may be affected if the proposed charter school opens.</p>	<p>Does not discuss where enrollment trends may be impacted, there was not enough data pulled from the family surveys to make meaningful estimates. Only three students in surveys are currently school-aged, and all three attend a charter school in the N Portland region.</p> <p>The implication that the proposed school will simply pick up the enrollment from a charter school that closed two years ago is concerning, especially given the lack of interest demonstrated in the surveys and other outreach efforts. Would like to see a more thoughtful, detailed response to the question of impact on district schools other than suggesting there will be an impact and it will not be significant.</p> <p>Applicant offers no specifics on impacts to underserved communities or mention of gentrification implications on intended location of school.</p>
<p>SECTION TOTAL: 6 (maximum possible = 9)</p>	

Section 8: Special Education

Statutory criteria: ORS 338.055(3)(g): *Whether there are arrangements for any necessary special education and related services for children with disabilities pursuant to ORS 338.165.*

- o **3 = Meets:** The application addresses the section criteria with responses that adequately demonstrate the applicant’s ability to successfully start and operate a charter school. Applicant demonstrates a clear understanding of the requirements of charter schools, as per relevant Oregon Revised Statutes and Oregon Administrative Rules, PPS Board policy regarding charter schools, and current PPS strategic initiatives in school system design. Applicant addresses the topic with specific evidence that shows thorough preparation and presents a clear, realistic picture of how the school intends to operate. Very little additional information or data is necessary.
- o **2 = Nearly Meets:** The application sufficiently addresses most of the section criteria, but does not provide adequate detail in the responses. Applicant provides some relevant data and/or information, but key data or informational points may be missing or flawed. The application lacks meaningful detail or requires additional information in one or more key areas.
- o **1 = Does Not Meet:** The application does not address the section criteria in adequate detail and/or the responses demonstrate the applicant’s inability to successfully start and operate a charter school. The applicant provides insufficient data and/or information to support assertions in the proposal, or uses flawed or misleading data and/or information. The applicant demonstrates a lack of knowledge of the requirements of charter schools, as per relevant Oregon Revised Statutes and Oregon Administrative Rules and/or lack of preparedness to open and operate a charter school. The applicant’s responses raise substantial concerns about the applicant’s ability to implement an effective educational, financial, and/or organizational plan.

Narrative Questions	Comments (including references from the application)
<p>1. Describes the arrangements for any necessary special education and related services provided pursuant to ORS 338.165 for children with disabilities who may attend the public charter school.</p>	<p>Describes process if student comes to the charter school with an existing IEP, but not the Child Find responsibility and referral process for students identified by charter school staff after enrolling.</p> <p>Response also emphasizes the implicit differentiation of the Montessori model as a means of addressing IEPs, lacking in detail to cover the broad spectrum of possible student needs that extend beyond academic only.</p>
<p>2. Explains how the instructional program will be differentiated or otherwise designed and implemented to meet the needs of special education students.</p>	<p>Response indicates apparent unfamiliarity with differentiation for students with IEPs. Doesn’t account for IEPs with behavioral or social-emotional as well as academic goals.</p>
<p>SECTION TOTAL: 4.3 (maximum possible = 6)</p>	

Section 9: Prior History

Statutory criteria: ORS 338.055(3)(i): *The prior history, if any, of the applicant in operating a public charter school or in providing educational services.*

- o **3 = Meets:** The application addresses the section criteria with responses that adequately demonstrate the applicant’s ability to successfully start and operate a charter school. Applicant demonstrates a clear understanding of the requirements of charter schools, as per relevant Oregon Revised Statutes and Oregon Administrative Rules, PPS Board policy regarding charter schools, and current PPS strategic initiatives in school system design. Applicant addresses the topic with specific evidence that shows thorough preparation and presents a clear, realistic picture of how the school intends to operate. Very little additional information or data is necessary.
- o **2 = Nearly Meets:** The application sufficiently addresses most of the section criteria, but does not provide adequate detail in the responses. Applicant provides some relevant data and/or information, but key data or informational points may be missing or flawed. The application lacks meaningful detail or requires additional information in one or more key areas.
- o **1 = Does Not Meet:** The application does not address the section criteria in adequate detail and/or the responses demonstrate the applicant’s inability to successfully start and operate a charter school. The applicant provides insufficient data and/or information to support assertions in the proposal, or uses flawed or misleading data and/or information. The applicant demonstrates a lack of knowledge of the requirements of charter schools, as per relevant Oregon Revised Statutes and Oregon Administrative Rules and/or lack of preparedness to open and operate a charter school. The applicant’s responses raise substantial concerns about the applicant’s ability to implement an effective educational, financial, and/or organizational plan.

Narrative Questions	Comments
<p>1. Describes the prior history of any of the founding members of the charter school or any members of the charter school’s board in operating a public charter school.</p>	<p>The experience of the individuals listed may indicate knowledge of Montessori education yet it is unclear as to how the individuals are uniquely prepared to operate a public charter school (experience in budgeting, staffing, board management, public school policies and procedures, records and enrollment management, etc.). The co-founder had experience helping to start a charter school in another state – what was their specific role? What was the success of that start-up? Response is extremely brief and does not elaborate on areas even where some experience is identified.</p>
<p>2. Describes the prior history of any of the founding members of the charter school or any of the members of the charter school’s board in operating a 501(c)3 nonprofit organization.</p>	<p>It is unclear if co-founder has operated a 501c3 (as Executive Director) or if she has worked <u>with</u> nonprofits and worked <u>for</u> a nonprofit but not as executive director. No other stated history among board or founders of operating a 501(c)3.</p>

3. Describes the prior history of any of the founding members of the charter school or any of the members of the charter school's board in providing educational services.	
SECTION TOTAL: 6.5 (maximum possible = 9)	

Average Ratings Summary

- This is a preliminary review and does not constitute a recommendation. This review will form the basis of the public hearing, which will take place following the release of the team review.
- The applicant may be asked by the Charter Schools Program Director to submit additional information at any time during the review process. Reviewers may be asked to review any additional information submitted.

Section	Maximum Points	Total Points	Determination
Section 1: General Information (17%)	39	31.5	<input type="checkbox"/> Meets (33-39) <input checked="" type="checkbox"/> Nearly Meets (27-32) <input type="checkbox"/> Does Not Meet (0-26)
Section 2: Demand for the Program (9%)	21	10.8	<input type="checkbox"/> Meets (18-21) <input type="checkbox"/> Nearly Meets (15-17) <input checked="" type="checkbox"/> Does Not Meet (0-14)
Section 3: Financial and Organizational Plan (17%)	39	29.5	<input type="checkbox"/> Meets (33-39) <input checked="" type="checkbox"/> Nearly Meets (27-32) <input type="checkbox"/> Does Not Meet (0-26)
Section 4: Instructional Program (24%)	54	35.8	<input type="checkbox"/> Meets (46-54) <input type="checkbox"/> Nearly Meets (38-45) <input checked="" type="checkbox"/> Does Not Meet (0-37)
Section 5: Educational Program for Academically Low-Achieving Students (3%)	6	3.7	<input type="checkbox"/> Meets (5-6) <input type="checkbox"/> Nearly Meets (4) <input checked="" type="checkbox"/> Does Not Meet (0-3)
Section 6: Additional Information Required by the District (19%)	42	29.3	<input type="checkbox"/> Meets (36-42) <input checked="" type="checkbox"/> Nearly Meets (29-35) <input type="checkbox"/> Does Not Meet (0-28)
Section 7: Value vs. Adverse Impact (4%)	9	6.0	<input type="checkbox"/> Meets (8-9) <input checked="" type="checkbox"/> Nearly Meets (6-7) <input type="checkbox"/> Does Not Meet (0-5)
Section 8: Special Education (3%)	6	4.3	<input type="checkbox"/> Meets (5-6) <input checked="" type="checkbox"/> Nearly Meets (4) <input type="checkbox"/> Does Not Meet (0-3)
Section 9: Prior History (4%)	9	6.5	<input type="checkbox"/> Meets (8-9) <input checked="" type="checkbox"/> Nearly Meets (6-7) <input type="checkbox"/> Does Not Meet (0-5)
TOTAL	225	157.5	

Section 1: General Information

1. State the projected enrollment to be maintained and the ages or grades to be served.

The Rhiza Schoolhouse (TRS) will be a Montessori school serving students from preschool to eighth grade. We will initially seek to serve students from kindergarten to sixth grade. As the school becomes more established, programs are furthered, and students age into programs we will extend to the additional grades/age groups. TRS will apply for Preschool Promises and the Pilot Programs of Preschool for All (PFA) during the first year to support the preschool aged programs. In addition, we plan to support infants to age three through a private program associated with the school and through grants funding.

For the 2023-2024 school year, TRS (TRS) will open with one primary classroom (kindergarten) classroom, one lower elementary classroom (1st-3rd grade), and one upper elementary classroom (4th-6th grade). This will allow for 80 spots in the first school year with 20 students in the primary classroom, 30 students in the lower elementary classroom, and 30 students in the upper elementary classroom. By year three, an additional primary classroom and lower elementary classroom will be added to accommodate growth. By year four, a middle school program will be added.

2023-2024: 1 primary, 1 lower elementary, 1 upper elementary

Total Students K-6: 80

2024-2025: 1 primary, 1 lower elementary, 1 upper elementary

Total Students K-6: 80

Total Students Preschool (3-4 years): 20

2025-2026: 2 primary, 2 lower elementary, 1 upper elementary

Total Students K-6: 110

Total Students Preschool (3-4 years): 40

2026-2027: 2 primary, 2 lower elementary, 1 upper elementary, 1 middle school

Total Students K-8: 134

Total Students Preschool (3-4 years): 40

2027-2028: 2 primary, 2 lower elementary, 1 upper elementary, 1 middle school

Total Students K-8: 158

Total Students Preschool (3-4 years): 40

2. Describe the target population of students the public charter school will be designed to serve.

As with the first Montessori school (See Appendix A), TRS aims to serve the underserved. In compliance with Oregon State Law, TRS will be open for any student in the Portland Public School District aged three to fourteen. We will focus on the North and Northeast communities of Portland with an emphasis on recruiting students and families of color.

We aim to celebrate the communities that will represent our school by acknowledging and embracing the differences that come with a diverse population. Our recruitment and admissions will not discriminate against race, religion, color, national origin, gender, sexual orientation, gender identity, gender expression, or status as an individual with a disability.

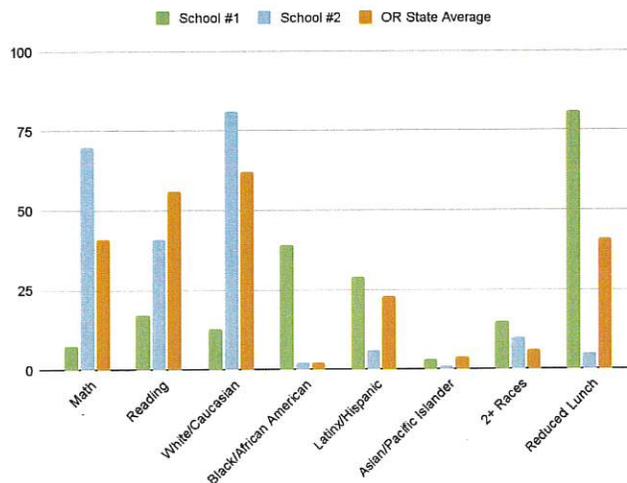
3. State the legal address, facilities and physical location of the public charter school, if known. If not known, state the region within Portland Public Schools District boundaries the charter applicant intends to locate the charter school.

TRS has not selected a location at this time. Extensive research has been done to identify potential locations and community buildings in the North and Northeast neighborhoods of Portland. Upon approval of the charter, the developers and board members will proceed with procuring a site that meets the appropriate regulations of the state and Portland Public School District. TRS will have a site selected with a lease or shared use agreement in place 90 days before the opening of the charter.

4. Describe the rationale for selecting the location and targeting the specified population.

US Census data from 2018 demonstrated that Northeast Portland has the highest concentration of communities of color who are historically underserved by the educational system. This location will allow us to be involved in those communities, while remaining centralized to increase access for any prospective student in the Portland Public School District.

Through increased access to high quality alternative education, we hope to help close achievement gaps that currently affect Portland's students. An audit of Portland Public Schools, executed by the Oregon Department of Education (ODE) demonstrated the significant gaps in performance that are specifically affecting children of color and disadvantaged students. This is exemplified by the performance of two public schools in the 2017-2018 school year in Northeast Portland that are within 1.9 miles of each other. School #1 had a student population that was 86% students of color with 6-9% of the students meeting expectations for their grade level in math and 15-19% of them meeting expectations in reading. This is contrasted by School #2, that was 81% white students with 70% of the students meeting expectations for their grade level in math and 41% of them meeting expectations in reading.



TRS is ready to reduce the gaps significantly by increasing access to high quality Montessori education for students within these communities. According to the results from the Riley-Furman study, the largest and most comprehensive study of Montessori education ever conducted, Montessori students in a state-wide system met more standards and showed more growth. This was especially noted in low-income and black sub-groups. The students showed more creativity, had fewer absences, and had fewer discipline events and suspensions. Montessori bridges the divide, offering child-directed, freely-chosen activity with

deep academic content, elements which are known to drive positive outcomes. Montessori aligns with principles and practices that a century of research has shown are more optimal for child development.

5. Describe how the location and facilities will accommodate the school's operations and the targeted student population, including students or staff with disabilities, and meet state and district standards for schools.

TRS seeks to improve access to Montessori education. The location of TRS will accommodate the school's target population by being located in the North or Northeast neighborhood of Portland. In addition to our efforts to recruit students and families from the neighborhoods, we also seek to recruit and hire staff from the surrounding areas.

We initially plan to establish the school in a community building within the desired area. By starting in an established facility, we will increase access to the community we wish to serve and be able to work and grow with the community.

We will ensure the building meets the requirements for clearance as a school facility according to Oregon State Law and the Portland Public School District. Initially, TRS will require 3 classrooms, 1 administrative space, and 1 community meeting space to support the projected enrollment.

6. Describe the plan to provide for any future space needs.

Within the first 5 years, the school will expand to require 8 classrooms, 2 administrative spaces, and 1 community meeting space. As we initially seek a location for the school, we will make efforts to identify a space that accommodates for the growth of the community. If that is not possible, we will make the best efforts to remain together in one location. Ideally, we would identify a space that would accommodate the initial growth and future growth. If necessary, we will look into the possibility of satellite campuses or multiple campuses to meet the needs of the TRS community.

7. Provide a description of proposed admission policies and application procedures.

- a. Include a description of the proposed lottery procedures and how they will comply with statutory requirements (ORS 338.125).**

The Rhiza Schoolhouse (TRS) will be open to any student who wishes to attend. The admissions policy will attract, enroll, and retain students and families who are representative of the north and northeast communities of Portland.

All applications and enrollment will be voluntary. All students who reside in the school district are eligible for enrollment at TRS if space is available. Pending available space, students outside of the school district will be eligible for enrollment. Admissions to TRS will not be limited by race, religion, color, national origin, gender, sexual orientation, gender identity, gender expression, or status as an individual with a disability

The lottery is weighted based on race, ethnicity, economic status, and English language proficiency. Students need to meet one criteria within the four areas. Students who meet or exceed the needed criteria will be entered into the lottery three times.

Applications will be available and accepted during the open enrollment period each starting in January for the following school year. Applications will be posted on TRS website and available for pick-up at the school. Applications will be accepted that are submitted by the due date that are:

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1. Submitted online via online application
2. Dropped off to the administrative office
3. Mailed in to the school with a postmarked date that matches the due date of the application

In accordance with ORS 338.125, if the number of applicants exceeds the number of available spots, attendance will be determined by an equitable lottery selection process. At the conclusion of the public random drawing, all students who were not granted admission due to capacity shall be given the option to put their name on a waitlist according to their draw in the lottery. Further details on this process are described in Exhibit VII, Section A.

8. Assure the school's compliance with all statutes and rules that shall apply to the public charter school, all applicable district policies and administrative directives and procedures, and its cooperation with district staff at all levels.

The founders and board members have reviewed all of the public charter statutes and rules (OR338.005 to OR338.165) and district policies and administrative directives and procedures. TRS will cooperate with the district regarding these rules and policies.

9. State the date upon which the public charter school would begin operating.

TRS will begin operation in the 2023-2024 school year. The first day of school will be on September 5, 2023.

10. State the requested term of the proposed charter.

The requested term for TRS public charter school is five year

Section 2: Demand for the Program

ORS 338.055(3)(a): The demonstrated, sustainable support for the public charter school by teachers, parents, students and other community members.

1. Not including individuals involved in the development of the charter school proposal, explain how educators, families, and community members demonstrated and continue to demonstrate sustainable levels of support for the proposed charter school.

As the founders initiated the development of TRS, they have reached out to their significant community. This community consists of fellow educators, former students, small business owners, Portland community members, friends, neighbors, and family. Their community has been engaged through verbal updates on our progress with this application and development process. This community has expressed desire to support TRS in its development and ongoing maintenance via being part of the parent community of TRS, assisting with marketing and outreach, monetary support, appropriate school set-up via renovation or classroom set-up, etc. A sample of supporters is listed below:

Jack and Ciara O'Neal	Wilson Lei	Brit Shostak	Justin Hughes and Caitlin Collins	Glen Purvis and Kelly Hale
Alan and Karen Horsley	Imelda Kelly	Charles Baugh	Grace Ilchuk	Rick and Colleen Reeker
Jack Graham	Andrew Gallagher	Gloria Kwong	Dr. RuthAnn Marston	Dave and Lisa Barrett
Jason Hess	Anne Sutherland	Adam Klever	Alexia & Ben Bednarz	Eva and Sean Becker
Timbre Yardley	Daphnee Berteau-Pavy	Eva and Timothy Chartier	Rachael Eidson and Jaime Martinez	Tom and Carol Quijada

TRS is a grassroots endeavor and will involve the community it will serve. Further outreach will be done to recruit additional board members, identify families, and recruit educators. We will reach out to community members, business owners, educational institutions, and churches in the desired areas to build a TRS community from the community where it will live.

2. Describe the manner in which community groups may be involved in the planning and development process of the public charter school.

TRS recognizes the importance of understanding the community in which you serve. The TRS founders have canvased at community events, led email campaigns, connected with local organizations, connected with local business, and are building our social media presence. With each of these endeavors we have been met with excitement and interest in the program. We will plan to continue to connect with members of the community via community events (i.e. farmer's markets, festivals), social media, informational meetings in-person and virtually, local business outreach, and existing community meetings (i.e. neighborhood associations). By connecting with the community, we can be an earpiece for desires and needs from a school to help build the environment and school that they need. Additionally, from this outreach we hope to recruit teachers, assistants, and board members to work with us and become community leaders for our school.

3. Consider the following goal from the PPS Racial Educational Equity Policy [2.10.010-P](#):

“The District shall welcome and empower families, including underrepresented families of color (including those whose first language may not be English) as essential partners in their student’s education, school planning and District decision-making. The District shall create welcoming environments that reflect and support the racial and ethnic diversity of the student population and community. In addition, the District will include other partners who have demonstrated culturally-specific expertise -- including government agencies, non-profit organizations, businesses, and the community in general -- in meeting our educational outcomes.”

- a. Explain how the charter school, acting in partnership with the District, would help meet this goal.

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TRS will recruit members of the community to be part of the development and continuation of the school. A location in the north or northeast neighborhoods of Portland where there is a higher population of underserved persons of color. TRS will recruit from this community directly to build the school that fits their needs.

b. Explain how the groups described in the goal support the development of the proposed charter school:

Direct outreach and support of the groups addressed above. The community that comes with the TRS founders is committed to creating an equitable environment for the students. Further outreach will be done to recruit additional board members, identify families, and recruit educators who represent the community we wish to serve and ensure appropriate development to address the needs of the community. We will reach out to community members, business owners, educational institutions, and churches in the desired areas to build a TRS community from the community where it will live.

c. Explain how the groups described in the goal above have been engaged in the development of this proposal to help mitigate negative impact on underrepresented families of color:

Direct outreach and support of the groups addressed above. The community that comes with the TRS founders is committed to creating an equitable environment for the students. Further outreach will be done to recruit additional board members, identify families, and recruit educators who represent the community we wish to serve and ensure appropriate development to address the needs of the community. TRS will recruit community members to work within the school and on the board to help represent the underrepresented in a position of leadership.

Section 3: Financial and Organizational Plans

ORS 338.055(3)(b): The demonstrated financial stability of the public charter school, including the demonstrated ability of the school to have a sound financial management system that is in place at the time the school begins operating and that meets the requirements of ORS 338.095 (1).

1. Describe the governance structure of the public charter school.

TRS will have a Board of Directors which will consist of five to 10 members, initially drawn from the charter's school developers. Parents as well as community members with educational, non-profit management, financial, fundraising, legal, marketing, facilities, and public relations/community outreach experience and expertise will be recruited.

2. Explain how the board was established and how it supports:

- a. the school's mission
- b. governance
- c. racial and cultural equity
- d. community outreach efforts
- e. fiscal stability

In reaching out to supporters of TRS, the founders identified five individuals who have embraced TRS and its mission to recognize the dignity and capacity of all human beings and is committed to serving the students of TRS through the Montessori philosophy and curriculum. They are committed fiduciaries who will steer the organization towards a sustainable future by adopting sound, ethical, and legal governance and financial management policies, as well as making sure the nonprofit has adequate resources to advance its mission. They will provide informed, authentic leadership for cultural equity, and strive to: 1) pursue cultural consciousness throughout our organization through substantive learning and formal, transparent policies, 2) acknowledge and dismantle any inequities within our systems, programs and services, and report organization progress 3) they will commit time and resources to expand a more diverse leadership within our board, staff, and advisory bodies. TRS board of directors recognizes the importance of understanding the community in which you serve. They will participate in activities to connect with members of the community via community events (i.e. farmer's markets, festivals), social media, informational meetings in-person and virtually, local business outreach, and existing community meetings (i.e. neighborhood associations). By connecting with the community, they will be an earpiece for desires and needs from a school to help build the environment and school that they need. Additionally, from this outreach we hope to recruit teachers, assistants, and board members to work with us and become community leaders for our school. The current board members are Thea Henderson, Elizabeth Brandt, Taylor Loynd, Esq. S. Jane Van Buren, M.D. and Chandon Thorell. All five board members have been actively involved in the start-up of TRS and have agreed to continue to provide leadership through August 2024.

Board member positions will be three-year terms to provide for long term continuity with elections held annually. The School Board's core purpose will be to uphold the school's mission, ensure the school performs according to its charter, and comply with all applicable laws. The School Board will model an ethical, cooperative, consensus-driven, decision-making process and responsibilities will include:

1. Approving the school's annual budget and overseeing the school's fiscal affairs;
2. Establishing and approving all major educational and operational policies;

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3. Approving all major contracts.

TRS Board will govern the school pursuant to Oregon non-profit law (ORS Chapter 65), Oregon charter school law (ORS Chapter 338), all other applicable laws, and the bylaws adopted by the incorporators. (See Exhibit XI - Bylaws)

3. Describe the plan to train and recruit board members.

The TRS Executive Director and supporters of the school will start by creating a list of your ideal board members (not specific individuals necessarily, but specific professions or someone at a certain level from a specific company, etc.) that includes the skills, talents, and connections our board needs. We will establish a nominating committee of board members who will be responsible for recruiting and vetting new board members. The entire board will be responsible for funneling names and resumes to this committee. We will provide a written board member job description which will include expectations, meeting attendance, committee participation, attendance at events, and donation and fundraising responsibilities. Each board member will participate in an orientation process. All new board members will be provided materials about the organization, a tour of the school, introductions to board and staff members, and a board member expectation form.

4. Explain how the directors' roles are different from the school administrators' roles.

The Board of Directors will first and foremost promote the mission and vision of TRS Public Charter School, stewards of the organization contributing foresight, oversight, and insight. The Executive Director/School Administrator will run the day-to-day management activities of the organization.

5. Describe any advisory or other board committees and how they will relate to the school's board and administration.

Board committees will allow the TRS board to achieve more efficient decision-making by dividing tasks among the board members and streamlining coordination and communication with all members and administration while overseeing accountability of the tasks at hand. When situations arise that require expertise outside the Board's skill set, the board will reach out to their own networks to engage an appropriate advisor to contribute their expertise and support the Board in achieving a successful outcome.

6. Describe the manner in which the program review and fiscal audit will be conducted.

TRS Public Charter School will report to the Portland Public Schools and the State Board of Education annually on the performance of the school and its students. TRS Public Charter School will disclose in its report information required to decide on compliance with the requirements in ORS chapter 338.

TRS proposes to use the format in Appendix C for its annual program review, which covers all elements outlined in the Oregon Department of Education - Oregon Public Charter School Handbook, April 2012.

TRS Public Charter School will have an annual audit of the financial accounts of the school prepared by a Municipal Auditor and in accordance with ORS 297.405 to 297.555 and 297.990. The annual audit shall be forwarded to the Portland Public Schools, the State Board of Education and the Department of Education. This information will also be available to the community on the TRS Public Charter School website.

7. Describe the plan for performance bonding and/or insuring the public charter school, including buildings and liabilities.

TRS will secure, retain and provide certificates of insurance to risk management for commercial and general liability insurance, errors and omissions, directors and officers liability insurance, data security coverage, automobile liability (if needed), workers compensation, employee dishonesty, property insurance and any and all other insurance required by law.

Section 4: Instructional Program

ORS 338.055(3)(c): The capability of the applicant, in terms of support and planning, to provide comprehensive instructional programs to students pursuant to an approved proposal.

For all questions: If replicating or using an existing program, provide data showing the program's measurable effects on students' academic achievement.

1. Provide a description of the philosophy and mission of the public charter school.

Mission: The Rhiza Schoolhouse (TRS) recognizes the dignity and capacity of all human beings and is committed to serving the students of TRS through the Montessori philosophy and curriculum.

Vision: Our vision at The Rhiza Schoolhouse (TRS) is a Montessori learning community where children are inspired to realize their academic, personal, and social potential to become global citizens.

Grounded in Montessori philosophy and pedagogy, the founders of TRS have adopted this proven educational approach that is widely available in the private sector and increasingly present around the nation as a public alternative. It is based on the idea that each student is competent, unique, and has an innate desire to learn. To implement this philosophy, TRS will:

- Create a challenging interdisciplinary curriculum aligning the Montessori Curriculum with Oregon Department of Education and the Common Core State Standard;
- Provide an abundance of learning materials specifically developed for the Montessori classroom;
- Empower the student to direct their own learning within the structure of the curriculum and with close guidance of the teacher;
- Facilitate inquiry, exploration, critical thinking, and creative problem solving;
- Understand and capitalize on individual learning styles;
- Cultivate global citizenship, personal responsibility, and respect for diversity;
- Educate the whole child by integrating the development of self-reliance, independence, and respectfulness with academic work.

2. Describe the curriculum of the public charter school and any distinctive learning or teaching techniques to be used.

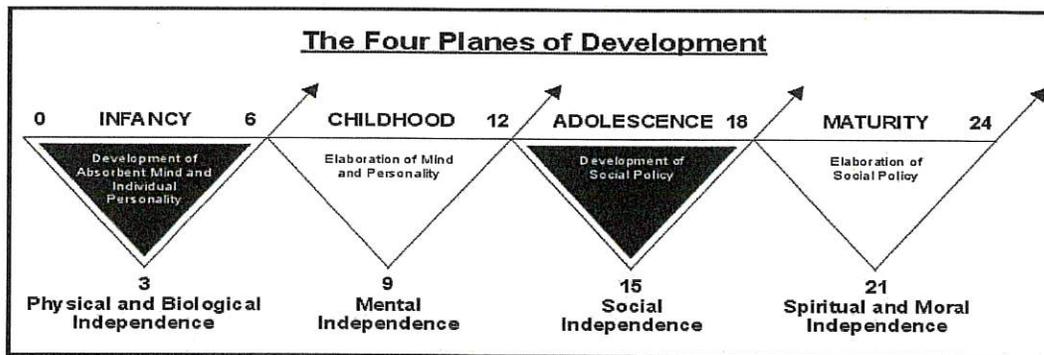
The Montessori Method of education is based on Doctor Maria Montessori's (1870-1952) scientific observations about how children learn as they progress from birth to adulthood. Named for its founder, Dr. Maria Montessori, the Montessori method is based on two simple truths: That children must be respected and that children spontaneously love learning. These principles and careful observation form a child-centered method that Montessori called an "education for life." Its goal is the finest development of the whole human being – emotionally, physically, intellectually and spiritually – toward the nurturing of peaceful, caring citizens.

The Montessori prepared environment honors the children and the beauty and order essential for them to work at their natural, individual and optimal level. Carefully designed, self-correcting and didactic Montessori materials attract the interest of the student, while at the same time teaching an important, isolated concept for the child's discovery. The child constructs their own reality and awareness, at first

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concretely through hands-on manipulation, until patterns are internalized and they discover the next level of abstraction. The integrated Montessori curriculum shows the child how every aspect of learning is connected and intertwined. The Montessori educator understands and guides the child without interfering in their natural ability to teach themselves and become an independent, contributing member in the global community.

The foundation of the Montessori method of education is the Four Planes of Development. At each plane, the associated human tendencies and characteristics inform how one can best prepare an environment for optimal learning.



A lot of time and effort is involved in creating a prepared Montessori classroom that is designed to meet the individual needs of all children. Through developmentally appropriate, sensorial materials that move hierarchically from simple to complex and concrete to abstract, children are given the freedom to fully develop their unique potential through a carefully prepared learning environment. Preparation of the environment and the organization of materials to support the planes of development and meet the child's needs and interests are key to the success of the Montessori method.

The Montessori curriculum is organized as an inclined spiral plane of integrated studies. Lessons are introduced simply and concretely in the early years and are reintroduced several times over the years at increasing degrees of abstraction and complexity. The Montessori course of study is an integrated thematic approach that ties the separate disciplines of the curriculum together into studies of the physical universe, the world of nature, and the human experience. Literature, the arts, history, social issues, civics, economics, science and the study of technology all complement one another in the Montessori curriculum. As an example, when elementary Montessori students study Africa, they would look at the physical geography, climate, ecology, natural resources, and the ways in which people have adapted to their environment: food, shelter, transportation, clothing, family life, and traditional cultures. They might read African folk tales, study about the great African civilizations, study endangered species, create African masks and traditional instruments, make African block print tee shirts in art, learn some Swahili, study dance in music, and prepare some typical means from various African cultures. Guest speakers, performers, and friends of the school help to make a field of study come alive through their memories, talents, and personal experience.

As we allow students to develop a meaningful degree of independence and self-discipline, we also set a pattern for a lifetime of good work habits and a sense of responsibility. In Montessori, students are taught to take pride in their work. Independence does not come automatically as we grow older; it must be learned. Montessori builds many opportunities into the curriculum for students to gain hands-on experience. Learning how to work and play together with others in a peaceful and caring community is perhaps the most critical life skill that Montessori teaches. Everyday kindness and courtesy are vital

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practical-life skills. Montessori students come to understand and accept that we all have responsibilities to other people. They learn how to handle the new situations that they will face as they become increasingly independent. Montessori students develop a clear sense of values and social conscience. Montessori consciously teaches students everyday ethics and interpersonal skills from the beginning. Even the youngest child is treated with dignity and respect.

3. Provide a description of the expected results of the curriculum, and the verified methods of measuring and reporting objective results that will show the growth of knowledge of students attending the public charter school and allow comparisons with other public schools.

TRS will meet our obligation of serving our students to become self-motivated, competent, and lifelong learners. Our goals are: to promote academic excellence and develop attributes of successful life-long learners.

There is an array of products available and TRS will research and determine the best Assessments Tools, Individual Learning Contracts (appropriate to each level) and Record Keeping Systems to monitor the growth of each student.

Assessment in the Montessori classroom incorporates the hourly, daily, and weekly appraisal of student progress. Early in their educational career at TRS, students will learn self-assessment from the prepared environment of self-correcting materials and the examples/ modeling provided by the adult teaching staff. Self-assessment, self-reflection, and self-correction are important lifelong skills that students acquire from the earliest years in a Montessori environment. Additionally, students have experience from their earliest years that their learning is a partnership with their teachers and parents. Teachers and students establish and agree upon daily, weekly, and monthly goals. Teachers will maintain written records of the work (Record Keeping System) presented and mastered, and each child has a "work plan" against which their progress is measured as they move through various time periods. At any given time, a Montessori teacher knows precisely where a child is academically, developmentally, socially, and emotionally. With frequent one-on-one interaction and individual, personalized assessment of student work by the classroom teacher, successes and/or concerns emerge and are quickly acknowledged and/or addressed. Constant fine-tuning and periodic adjustments maximize student progress and assure intellectual engagement for each child. Additionally, TRS will provide formal documentation, utilizing Portland Public Schools District Report Card, of the student's progress three times per year during Parent/Teacher Conferences. A teacher narrative will accompany, 'translating' the Montessori environment and materials to the district report card. Students' portfolios will also supplement the district report card allowing parents to see which works/projects their student is most proud to share.

4. Describe how the charter school will ensure that:

- a. students meet growth targets

Teachers at TRS will implement the Montessori curricula for core instruction in Literacy, Math, Science and Cultural Studies. The Montessori curriculum has proven to be successful in giving students the skills they need to exceed grade level expectations. It allows for maximum differentiation, so that each student's needs are met while ensuring that all standards are addressed. Montessori's lesson cycle, based on mastery, insists on every student's ability to learn the skills necessary for success while advancing at their own individual pace. While some students will learn more deeply in certain subjects, every student will obtain mastery of the standard set of skills that will bring success in school and the global community.

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A new paper from Angeline Lillard, Allyson Snyder, and Xin Tong, published in 2021, compared test scores for 195 public Montessori schools with their surrounding districts and found that Montessori schools did better in reading at third and eighth grades. They did worse in math in third grade, but better in eighth, and low-income and Black students did better in Montessori schools on both tests at both grades. The authors collected the percentage of students rated "proficient" on third and eighth grade English Language Arts (ELA) and math tests from publicly available data over a three-year period (2016-2019). The biggest result for Montessori overall was in the change in proficiency from third to eighth grade, controlling for proficiency at third grade.

b. students meet subgroup growth targets,

TRS intends to match the instructional goals of the Portland Public Schools (PPS) in relation to Oregon's academic content standards and benchmarks. In the first year of operation with third and fifth grade students, state assessments will be administered. TRS will use the results of the assessments to evaluate student intervention needs. Based on those evaluations, TRS will review the areas of deficiency to revise curriculum and implement any additional areas of instruction. The goal is for all TRS students to demonstrate proficient or advanced competencies in Reading, Written and Oral Communication, Mathematics, and Science as defined in the Oregon standards. The Rhiza Schoolhouse (TRS) will collect adequate yearly progress data using the same methods that the PPS utilizes for the following populations:

- a. All students
- b. Racial/ethnic groups
- c. Economically disadvantaged children
- d. Students with disabilities
- e. Students with limited English proficiency

The same paper from Angeline Lillard, Allyson Snyder, and Xin Tong, published in 2021, the students in Montessori schools gained more between the two grades than the district schools overall and across all race and income subgroups. The most important results, however, are in the scores of those subgroups. Black students did unequivocally better with Montessori in ELA and math at 3rd and 8th grades. Hispanic and low-income students did the same, albeit with much smaller effects in 3rd grade math. TRS will evaluate student progress using daily formative assessments and individual curriculum progress tracking sheets.

c. students meet all associated standards using current Oregon or federal accountability assessments in English/Language Arts, Mathematics, Writing, Science, and participation at grades 3-8 and 9-12, and attendance at all grades, where applicable.

TRS will use the results of the current Oregon or federal accountability assessments in English/Language Arts, Mathematics, Writing, Science to evaluate student intervention needs. TRS will gather and use valuable student data to inform our classroom practice. Cross-sector partnerships with local and state health agencies, community-based organizations, community and business members and families will be leveraged to provide essential wraparound support to encourage regular attendance for all students. Creating these partnerships and having a welcoming school environment will mitigate absenteeism rates and raise academic performance. Best and promising practices are most successful when they are systematically applied with knowledge of the local context.

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5. Explain how the proposed curricula, methods, and materials are based on sound and effective models and/or approaches that will result in increased learning and achievement for all students.

Montessori education often talks about some of the specifics--no grades, child-size objects, students choose their own activities, the same set of materials in every classroom, etc. Montessori education was so groundbreaking because it was the first, *scientific* education method. Dr. Montessori experimented with methods and, based on the results, built up a theory of the child, which she then tested and refined through experiment. The reason why everything is the way it is in a proper Montessori classroom is simple: it has been shown through repeated experiments to *work*, in countless classrooms and across many cultures. It is because of this scientific character of Montessori education that it produces such excellent results, results that are validated again and again.

The Riley-Furman study completed a multi-year study of Montessori education in South Carolina's public schools and found the positive Montessori effects stem directly from the core elements of the Montessori philosophy and method, which have remained relatively unchanged for over 100 years. Many of these core practices have been researched independently and found to be solid strategies for yielding positive outcomes for students. In the Montessori model, however, they are bundled into one instructional package, complementing each other and guided by the Montessori philosophy of how children develop and learn. Montessori students consistently demonstrated higher school attendance than matched non-Montessori students after adjusting for the attendance rate in the previous year and student characteristics. Furthermore, Montessori students were significantly less likely than similar non-Montessori students to have had a disciplinary incident or have served a suspension during the school year.

Proficiency-For the most recent year of data collection (2015-16), 52% of Montessori students met or exceeded state standards in ELA, 46% met or exceeded state standards in math, 70% met or exceeded state standards in science, and 80% met or exceeded state standards in social studies. When compared to non-Montessori public school students across the state, Montessori students were more likely to have met or exceeded the state standards in each of the four subjects.

Achievement Growth Analyses-After matching Montessori students to demographically similar non-Montessori students and controlling for student demographics and previous test scores, researchers found that Montessori students scored significantly higher on English Language Acquisition (ELA) state standardized tests than non-Montessori students across all three years of the analysis. Furthermore, there was a significant Montessori advantage in math and social studies in two of the three years. The results for science were mixed, as Montessori students demonstrated significantly less growth than non-Montessori students in one year (2013-14) and significantly more growth in another year (2015-16). Subgroup analyses indicated that low-income Montessori students scored significantly higher than low-income non-Montessori students in ELA, math, and social studies.

Dr. Angeline Lillard, professor of psychology at the University of Virginia, has been studying Montessori's methods for more than two decades. In her book *Montessori: The Science behind the Genius*, Dr. Lillard was at first skeptical of Montessori's ideas when she started her research 20 years ago. She has since discovered that a strong body of evidence in developmental psychology supports Montessori's major conclusions -- among them, that there is a close relationship between movement and cognition, that the best learning is active and that order is beneficial for children. Above all, Montessori was practical. She looked for what worked rather than what fit a theory. "If schooling were evidence-based," Dr. Lillard wrote, "I think all schools would look a lot more like Montessori schools."

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6. Explain how the instructional program will support students of all races and ethnicities in meeting state content standards and benchmarks.

Over 100 years ago, Montessori education was founded on the principle that every child, regardless of race, gender, or social standing, deserved a quality education. Dr. Montessori developed a system of learning for all students, as the key to the method is the individualized attention given to each child. Teacher's look for the children's brilliance and each child's brilliance is different. By creating an educational space that is grounded in peace education and driven by problem-posing education, even the youngest learners of the educational system will research, experiment, and produce knowledge.

Montessori students work at their own pace on sequential lessons, and their learning is individually tailored. They collaborate with other students, moving freely around the classroom, and the curriculum emphasizes community building as students develop strong relationships with the same teacher over 3 years. Through the Montessori practice and culturally responsive pedagogy, an approach that promotes students' cultural strengths that support their well-being and achievement. Through this method and having teachers of different races, ethnicities and a second and/or third language will establish a foundation of success to meet Oregon State standards and benchmarks.

7. Explain how the proposed charter school will offer students comprehensive instruction (where applicable) in English Language Arts and Literacy, Science, Literacy in Science and Technical Subjects, Health Education, Arts, Mathematics, Educational Technology, Social Sciences, Literacy in History and Social Studies, World Language and Physical Education that meets the academic content standards adopted by the State Board of Education and meets other requirements adopted by the State Board of Education and the board of the public charter school.

English Language Arts and Literacy-Montessori begins by placing the youngest students in classes where the older students are already reading. All children want to "do what the big kids can do," and as the intriguing work that absorbs the older students involves reading, there is a natural lure for the young child. Montessori teaches basic skills phonetically, encouraging children to compose their own stories using the "movable Alphabet." Reading skills tend to develop so smoothly in Montessori that students tend to exhibit a sudden "explosion into reading". There is typically a quick jump from reading and writing single words to sentences and stories. Then, a systematic study of the English language: vocabulary, spelling rules, and linguistics. The children learn the functions of grammar and sentence structure as early as first grade. During the elementary years, Montessori increasingly focuses on the development of research and composition skills. Students write every day, learning to organize increasingly complex ideas and information into well written stories, poems, reports, plays and student publications. Finally, and most importantly, the key to the language-arts curriculum is that even the very young students are introduced to quality children's literature, books and fascinating works on science, history, geography, and the arts.

Science/Cosmic Studies-Science/Cosmic Studies lessons and units of exploration are designed to give students a sense of the story of the universe, how life developed, and the story of our history. These lessons and experiences are introduced in the hope that they will inspire in students a sense of wonder and awaken interest, appreciation, and understanding. Science/Cosmic Studies is divided into subcategories that contain lessons sequenced in the order in which they will be introduced to the students. The aim is not only to make the student understand, and still less, to force them to memorize, but so to touch their imagination as to enthuse them to their innermost core. Main Lessons: 1) Coming of the Universe and the Earth, which includes the study of ; Astronomy: solar system, stars, galaxies, comets, constellations, Meteorology: wind, currents, weather, fronts, erosion, water cycle, clouds, glaciers, Chemistry: states of matter, changes, mixtures, reactions, elements, atoms, periodic table, compounds, molecules, chemical formulas, equations, lab work, experimentation, Physics: magnetism, electricity, gravity, energy, light,

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sound, heat, friction, motion, experimentation, Geology: types of rocks, minerals, land forms, volcanoes, earthquakes, plate tectonics, ice ages, eras of the earth, Geography: maps, globes, latitude/longitude, climates, land/water form names, continent and country research. 2) The Coming of Life which revolves around the Timeline of Life, a long chart with pictures and information about microorganisms, plants, and animals that have lived (or now live) on the earth. The great diversity of life is emphasized, and special care is paid to the "jobs" that each living thing does to contribute to life on earth. This lesson leads to the study of; Biology: cells, organized groups, five kingdoms, specimens, dissection, observation, use of microscope, Botany: study of plants, classification, functions, parts of plants (seed, fruit, leaf, stem, root, flower), types of plants, Habitats: location, characteristics, food chains/webs, symbiosis, adaptation, ecosystems, conservation, Ancient Life: eras of the earth, evolution, extinction, fossil records, excavation, Animals: classification, needs, similarities/differences, human systems, nutrition, hygiene, Monera, Protista, and Fungi Kingdoms: what they are, classification, observation.

Literacy in Science and Technical Subjects-Learning comes more easily when students work with concrete educational materials that graphically show what is taking place in a given Scientific and/or Technical process. Montessori students use hands-on learning materials that make abstract concepts clear and concrete. This approach to teaching Science and Technical Subject matter is based on the research of Dr. Maria Montessori offers a clear and logical strategy for helping students understand and develop a sound foundation. In science and technical subjects, students must be able to write precise enough descriptions of the step-by-step procedures they use in their investigations or technical work that others can replicate them and (possibly) reach the same results. Science lessons incorporate a balanced hands-on approach. With encouragement and a solid foundation, all children are ready and anxious to investigate their world, to wonder at the interdependence of living things, and to explore the ways in which the physical universe works, and to project how it all may have come to be. Children in early elementary grades explore basic atomic theory and the process by which the heavier elements are fused out of hydrogen in the stars. Others are studying advanced concepts in biology, including the systems by which scientists classify plants and animals and living and nonliving things. TRS will expand the science curriculum by acquiring more hands-on material and lessons supporting Science, Technology, Engineering, and Mathematics (STEM), learning for the 21st century.

Health Education and Physical Education -The Montessori approach to health and fitness is helping children to understand and appreciate how our bodies work and the care and feeding of a healthy human body. Students typically study diet and nutrition, hygiene, first aid, response to illness and injury, stress management, and peacefulness and mindfulness in our daily lives. Daily exercise is an important element of a lifelong program for personal health and TRS will include a Physical Education Curriculum developed by a Montessori certified educator, 'After Cool Fitness', which complements the Montessori Method by focusing on developing greatness through play. Additionally, the curriculum will be supplemented by the 3Rs curriculum focused on health education for students K-12. The organization has resources specific to Multnomah County and will be incorporated into each year of learning.

Arts- The arts, music history and appreciation are woven throughout as is dance, theater, visual art in many mediums, writing and more.

Mathematics-Learning comes more easily when students work with concrete educational materials that graphically show what is taking place in a given mathematical process. Montessori students use hands-on learning materials that make abstract concepts clear and concrete. This approach to teaching mathematics is based on the research of Dr. Maria Montessori offers a clear and logical strategy for helping students understand and develop a sound foundation in mathematics and geometry. The basic concepts of the decimal system are presented with the 'Bead Cabinet': units are represented by single one-centimeter beads, a unit of ten beads strung together is a ten-bar. Hundreds are squares made up of ten ten-bars, and thousands are cubes made up of ten hundred-squares. Using these concrete materials, even very young

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children can build and work with great numbers. From this foundation, all of the operations in mathematics, such as the addition of quantities into the thousands, become clear and concrete, allowing the child to internalize a clear image of how the process works. The Montessori math curriculum is based on the European tradition of 'Unified Math', which introduces all age students to the study of the fundamentals of algebra, geometry, logic, and statistics, along with the principles of arithmetic. This study continues over the years, weaving together subjects. In operations concerned with measurement, geometry shows them how to perform their calculations. In operations concerned with figures, algebra gives a system of still more abstract symbols by means of which more complicated relationships can be comprehended. The calculations of area and volume, of squares and square roots are examples in which algebra, arithmetic, and geometry are all involved. For Montessori students, arithmetic, algebra, and plane and solid geometry have never been arbitrarily separated. Four- and five-year-old Montessori children can name geometric forms that most adults wouldn't recognize. Elementary Montessori students continue to gain hands-on experience by applying math in a wide range of projects, activities, and challenges, such as graphing the daily temperature and computing the average for each month, or adjusting the quantities called for in a recipe for a larger number of people. Because children love to work outdoors, teachers try to prepare tasks that use the school grounds whenever possible. For example, using simple geometry, children can determine the height of a tree or measure the dimensions of the buildings. They prepare scale drawings, calculate area and volume, construct three-dimensional geometric models, and build scale models of historical devices and structures. The computer is another key tool used in teaching mathematics. Students use them to help with their memorization of their basic math facts. They provide all sorts of simulations and problem-solving situations, calling on students to compete against the computer or make reasonable predictions in engaging role-playing scenarios. Students work with spreadsheets, graphs and logical analysis.

Educational Technology- Technology is a powerful tool and a requisite part of our society. TRS teachers and staff will incorporate learning experiences to meet the needs of all learners utilizing digital tools in an effective manner.

Social Sciences, Literacy in History and Social Studies-We are all members of the human family. Our roots lie in the distant past, and history is the story of our common heritage. Without a strong sense of history, we cannot begin to know how we are as individuals today. The goal is to develop a global perspective, and the study of history and world cultures forms the cornerstone of the Montessori curriculum. Montessori teaches history and world cultures starting as early as age three. The youngest students work with specially designed maps and begin to learn the names of the world's continents and countries. Physical geography begins in the first grade with a study of the formation of the Earth, the emergence of the oceans and atmosphere, and the evolution of life. Students learn about the world's rivers, lakes, deserts, mountain ranges, and natural resources. Elementary students begin to study world cultures in greater depth: the customs, housing, diet, government, industry, the arts, history and dress. They learn to treasure the richness of their own cultural heritage and those of their friends. Elementary students study the emergence of human beings during the old and new stone ages, the development of the first civilizations, and the universal fundamental needs common to all humanity. For older elementary students, the focus is respectively on early man, ancient civilizations, and early American history. Montessori tries to present a sense of living history at every level through direct hands-on experience. Students build models of ancient tools and structures, prepare their own manuscripts, make ceremonial masks, and recreate all sorts of artifacts of the everyday life of an historical era. International studies continue at every age level in Montessori education. The curriculum integrates art, music, dance, cooking, geography, literature, and science. Children learn to prepare and enjoy dishes from all over the world. They learn the traditional folk songs and dances in music, and explore traditional folk crafts in art. In language arts, they read the traditional folk tales and research and prepare reports about the countries they are studying that year. Units of study often culminate in marvelous international holidays and festivals that serve as the high points of the school year. Practical economics is another important element in the

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Montessori curriculum. Young students learn how to use money and calculate change. Older students compute the cost of a weekly meal for their class, plan a weekly budget, maintain a checkbook, organize and run holiday gift shops, sell produce they have grown. Students learn to recognize the value of a dollar: how long it takes to earn it, and what it can buy. Citizenship is yet another element that weaves throughout the elementary curriculum. Students study the workings of the local, state, and federal governments and begin to follow current events. During election years, they meet candidates, discuss the issues of the day, and sometimes even volunteer in the campaign of a local candidate of their choice. While Montessori schools are communities apart from the outside world in which children can first begin to develop their unique talents, they are also consciously connected to the local, national, and global communities. The goal is to lead each student to explore, understand, and grow into full and active membership in the adult world. Field trips are an integral part of the curriculum, supporting the learning in the classroom through thematically related trips to a variety of destinations.

World Language-To support the International Culture/Social Sciences a second language is introduced to even the youngest children. The primary goal in a foreign language program is to develop conversational skills along with a deepening appreciation for the culture of the second language. TRS will include a second language as well as incorporate Sign Language as an additional communication tool. Sign Language has been linked with enriching and enhancing cognitive processes: higher abstract and creative thinking, better problem-solving, greater cognitive flexibility, better listening skills and greater academic achievement. The Primary and Elementary years are optimal for the child to absorb a second and a third language. It is a period of intense mental activity that allows the child to "absorb" learning from their environment without conscious effort, naturally and spontaneously.

The Montessori didactic materials allow students to work concretely with many concepts all while acquiring the vocabulary in English as a Second Language or, for native English speakers, a second language to communicate those concepts. The ongoing collaboration between students and teachers offers almost continuous opportunities to hear and speak two languages. The non-competitive school environment and low student-teacher ratio support the student when trying to communicate in a new language.

8. Explain how the instructional program and curriculum will be designed to be culturally responsive, and to close achievement and opportunity gaps specific to race and poverty.

The Montessori method of education has been an alternative approach to education used around the world for 100 years. Yet, so much of what Dr. Montessori developed resonates as timeless and universal: instruction reflects that each student is considered as an individual, concepts are presented from the concrete to the abstract, manipulatives and visual aids accompany learning new concepts and storytelling and social interaction are invaluable in the classroom - culturally responsive teaching in recognizing the pluralistic nature, cultural characteristics, experiences, and perspectives of ethnically diverse students as conduits for teaching them more effectively.

TRS believes culture and diversity are assets to our classrooms and the community served and are to be respected for their multiple perspectives on learning, definitions of success, and pathways for self-determination. That the rich history, culture and speaking a language other than English is a source of pride and an asset to embrace and celebrate.

TRS will address the needs of all students by:

- Providing exceptional teachers of different races, ethnicities and a second and/or third language
- Offering unique opportunities to make strong home, school, and community connections in an effort to increase academic achievement and personal well-being.

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- Recognition that not all students are the same
- Those with less will need more (e.g. time, attention and support)
- Confront the ways in which students are denied learning opportunities. and implement strategies to support the most vulnerable students

9. Explain how culturally relevant curriculum will be integrated into instruction at all levels.

TRS is committed to Portland Public Schools focus on closing achievement and opportunity gaps, meeting the District's Measures of Success (The Milestones Framework), and educating an ethnically, racially, and socioeconomically diverse group of students with culturally competent curriculum and pedagogy.

TRS teachers and staff will seek to connect the knowledge base the students bring and include in new content introduced at school. While some students will come to school informed by a dominant culture, already primed for success by their home-culture, TRS teachers will create the link from their home-cultures to school-culture to avoid the cultural dissonance that has put some learners at a disadvantage. Teachers will be required to make these connections to know their students and their lives outside of school. TRS is confident that the Montessori approach will be congruent with our community's values and goals.

To effectively implement the elements into teaching that will reach the students:

- At the source, TRS will have caring educators who show genuine regard for the students
- Teachers will make the students their own and create classroom communities.
- They will have a commitment of love in education, a love that would be lively, forceful, and inspiring, while at the same time, critical, challenging and insistent
- Teachers will reject the status quo and deficit theories to maintain high expectations and expand one's cultural knowledge base while creating partnerships with students' communities and families.
- As in all Montessori classrooms, there will be thoughtful planning of the physical environment; "symbolic curriculum" including images, symbols, icons, mottoes representing the diversity of the classroom community and The Rhiza Schoolhouse (TRS).
- The students' home languages and literacy will be valued and utilized in the lessons
- Lessons and assessments will be designed to be culturally responsive
- Content will be critically evaluated
- Music, drama, and the arts will be incorporated into lesson designs that will be used to capitalize on learners' strengths.

10. Explain how this charter school proposal will help meet the following strategic objectives (where applicable).

Explain how this charter school proposal will help meet the following strategic objectives (where applicable).

a. Enter first grade: Ready to read – i.e., evidence of reading readiness by the school's internal local performance measures.

Montessori teaches basic skills phonetically, encouraging children to compose their own stories using the "movable Alphabet." Reading skills tend to develop so smoothly in Montessori that students, as early as four and five years old, tend to exhibit a sudden "explosion into reading".

b. End of third grade: Reading to learn – Students meet or exceed state benchmarks on ELA assessments.

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The Montessori curriculum supports 100% of the students reading to learn by the end of third grade as stated in The Portland Public Schools Milestone Framework.

c. Middle years: Ready for high school – i.e., student attendance is 90% or greater, students meet or exceed state benchmarks on ELA assessments, and students take and pass 8th grade algebra.

The Montessori Middle School Curriculum requires mastery in all subject areas and mandatory attendance for all students. The students will be prepared to meet/exceed state benchmarks on ELA Assessments and 8th Grade Algebra.

d. Enter 10th grade: On track to graduate: i.e., students complete 9th grade with 6 credits and not lower than a C grade in core subjects. N/A

e. 12th grade: Graduating on time, ready for college and career. N/A

11. Explain how this charter school proposal will minimize barriers to equal access and meet the needs of all students.

The Montessori method provides a framework for delivering the curriculum enabling all individuals to gain knowledge, skills, and enthusiasm for learning. Montessori provides rich support for learning and reduces barriers to the curriculum while maintaining high achievement standards for all through multiple means of representation, multiple means of action and expression, and multiple means of engagement.

12. Explain how school performance data will allow comparisons with other public schools.

TRS will provide formal documentation, utilizing Portland Public Schools District Report Card, of the student's progress three times per year during Parent/Teacher Conferences. A teacher narrative will accompany, 'translating' the Montessori environment and materials to the district report card.

13. Explain how the instructional program will be differentiated or otherwise designed and implemented to meet the needs of students who are English Language Learners.

English Language Learners will be fostered through the foundations of the Montessori model, primarily through inquiry-based learning using manipulatives in all subject areas. Because little language is needed for these manipulatives and learning is still successfully occurring, students are able to obtain the concepts, solidify their understanding, and then move on to gaining the English language needed to express their ideas verbally.

In all levels, students will be introduced to and continue the study of the mechanics of the English language, the etymology of words, syntax, and parts of speech with the aid of the Montessori materials. Great emphasis will be placed on developing the student's ability to communicate through the written word.

English Language Learners will thrive in the Montessori classroom because each concept is modeled by the teacher, replicated by the student, and then practiced through a process of having the student revisit the manipulative or lesson on their own multiple times until the student masters the skill set and is ready to move on to the next challenge.

The Montessori curriculum addresses different language groups, different grade levels (Multi-age classrooms), different subgroups within a class and different proficiency levels of English Language Learners. It includes the teacher using specific instruction, modeling the lesson, practicing correct

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classroom behaviors and academic expectations within the classroom, and then providing opportunities for students to practice their skills with hands-on learning resources, rather than language-based learning resources and experiences. This is especially important for the beginning and early intermediate English Language Learners, who may excel at a task which is hands-on, but struggle with a task which is language-based in nature. Students are able to work with others or independently on a project which they enjoy doing. The students are not learning from a book, which may have too much language, but are learning from the models, answer keys, mini lessons with the teacher, and through working with peers, if they chose to do so. This motivation for learning is central to the acquisition of a second language. This self-directed, inquiry-based style of learning improves educational persistence in students, supporting students' success in the academic system.

14. Explain how the instructional program will be differentiated or otherwise designed and implemented to meet the needs of students who are identified as Talented and Gifted.

A gifted child needs not only a challenging, individualized academic experience that feeds their hunger for learning, they also need emotional and social support. According to The National Society for The Gifted and Talented, there are four components that one should seek in a gifted program for their child. These include procedures that are equitable and comprehensive, multiple options for individual needs, staff that is well-trained, and a differentiated curriculum. It has been verified that Montessori is the ideal learning environment for gifted learners of any grade level.

The Montessori educational philosophy incorporates autonomy, mastery and purpose as essential elements and bases motivation solely on the innate desire to learn in children. Montessori teachers are trained to challenge each child as an individual. As a child masters a concept in the math curriculum, for example, the teacher then presents the next lesson regardless of their grade level. As a result, gifted children are never held back by their age, the abilities of their peers, or by program parameters. A gifted child in a Montessori school has the benefit of staying with their peer group while receiving challenging work far beyond their grade level.

15. Explain how the proposed charter school will address the Oregon legislature's goals for charter schools in ORS 338.015:

- a. Increase student learning and achievement.

Dr. Montessori developed a system of learning for all students, as the key to the method is the individualized attention given to each child. The Riley-Furman study found after matching Montessori students to demographically similar non-Montessori students and controlling for student demographics and previous test scores, researchers found that Montessori students scored significantly higher on English Language Acquisition (ELA) state standardized tests than non-Montessori students across all three years of the analysis. Furthermore, there was a significant Montessori advantage in math and social studies in two of the three years. The results for science were mixed, as Montessori students demonstrated significantly less growth than non-Montessori students in one year (2013-14) and significantly more growth in another year (2015-16). Subgroup analyses indicated that low-income Montessori students scored significantly higher than low-income non-Montessori students in ELA, math, and social studies.

- b. Increase choices of learning opportunities for students.

The Montessori course of study is an integrated thematic approach that ties the separate disciplines of the curriculum together into studies of the physical universe, the world of nature,

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and the human experience. Literature, the arts, history, social issues, civics, economics, science and the study of technology all complement one another in the Montessori curriculum.

- c. Better meet individual students' academic needs and interests.

The Montessori prepared environment honors the children and the beauty and order essential for them to work at their natural, individual and optimal level. Carefully designed, self-correcting and didactic Montessori materials attract the interest of the student, while at the same time teaching an important, isolated concept for the child's discovery. The child constructs their own reality and awareness, at first concretely through hands-on manipulation, until patterns are internalized and they discover the next level of abstraction. The integrated Montessori curriculum shows the child how every aspect of learning is connected and intertwined. The Montessori educator understands and guides the child without interfering in their natural ability to teach themselves and become an independent, contributing member in the global community.

- d. Build stronger working relationships among educators, parents, and other community members.

TRS will strive to be a model Montessori site for future teachers, educators and policy makers. A quality educational staff comprised of a Director, Educational Consultant, Montessori Certified teachers and assistants will be recruited and given the support they need to deliver quality learning experiences to all students. A diverse population of students will also be recruited: students at risk, students with special needs, gifted students, and students from diverse social and ethnic backgrounds. TRS will provide students with a calm, warm, and nurturing environment where a sense of community, powerful friendships, and cooperative, rather than competitive, relationships are fostered. TRS believes in forging strong links with the community, local, state, and national agencies, and organizations that work to strengthen charter school programs, Montessori programs and educational outcomes for all students.

- e. Encourage the use of different and innovative learning methods that are not already provided by the district

Currently, there are no public Montessori schools in Portland serving ages 3-14. TRS will begin with grades K-6, and in year two, the plan includes offering public preschool through Universal Preschool or grant awards. Between the two charter schools that were up for renewal in 2021, there was an average wait list of 115 students in the Kindergarten age group, 31 students in 1st grade, 18 students in 2nd grade, 10 students in 3rd grade, 6 students in 4th grade, and 5 students in 5th grade.

- f. Provide opportunities in small learning environments for flexibility and innovation, which may be applied, if proven effective, to other public schools.

TRS will have a Lead and an Assistant teacher in each classroom with an average student/teacher ratio of 12:1. The students will work individually, in pairs and/or small groups depending on the subject or project. The three hour uninterrupted work cycle provides a multitude of opportunities for students to experience flexibility and encourage innovation.

- g. Create new professional opportunities for teachers.

TRS realizes that the educators will play a pivotal role in modeling their natural curiosity and love of learning to the students and we know that through professional development, educators increase their knowledge base, sharpen their skills, and re-energize. This goal reflects our belief

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that our teachers will play a critical role in the educational process and we will promote continuing education and professional development.

- h. Establish additional forms of accountability for schools.

TRS is committed to creating a culture of trust and responsibility, setting high standards and clear expectations, giving students ownership of the learning process, helping students learn to self-assess their work and connecting the classroom to the home.

- i. Create innovative measurement tools.

TRS will gather information about student learning that can be assessed through both direct and indirect measures. Direct measures may include reports, essays, research projects and rubrics for oral and other performances. Examples of indirect measures include student/parent/teacher surveys, open houses at different times of the school year, Parent/Teacher conferences, observations and portfolio assessments and graduation rates.

Section 5: Educational Program for Academically Low-Achieving Students

ORS 338.055(3)(d): The capability of the applicant, in terms of support and planning, to specifically provide, pursuant to an approved proposal, comprehensive instructional programs to students identified by the applicant as academically low-achieving.

1. Explain how the instructional program will be differentiated or otherwise designed and implemented to meet the needs of academically low-achieving students.

Montessori classrooms, by design, effectively serve students who, historically, are academically low-achieving, as well as those who are academically high-achieving.

Research supports the concept that children develop at different levels. Montessori education addresses this research by providing each child with a solid foundation at their own pace, allowing each child to work on an individualized timeline that is appropriate, based on experience and mastery learning. Every child, regardless of ability, is continually challenged through the didactic kinesthetic experience.

2. Describe the academic and other supports that will be available for students identified as academically low-achieving.

The plan for low academic achievers through the dedicated implementation of Montessori Methodology, includes three remediation areas. These include: an individualized and tailored plan for support, additional one-on-one tutoring, and the availability of supplemental materials to teachers. Individuals who test below grade level will be guided toward remedial work to solidify the earlier skills they have not yet mastered.

An individualized support plan identifies specific developmental and academic areas of need for low achievers and establishes interventions that are monitored and reviewed at subsequent support meetings.

Section 6: Additional Information Required by the District

ORS 338.055(3)(e): The adequacy of the information provided as required by ORS 338.045(2) and (3).

Supports for Learning:

1. Describe the key employment requirements and qualifications for each staff position listed below. Include an explanation of how all teachers in core subjects will be qualified per requirements of Every Student Succeeds Act (ESSA).

- a. Teachers. (Include qualifications for serving ELL, TAG, SpEd, etc.)
- b. Teaching assistants.
- c. Counselors.
- d. Principals, directors, managers, and any other administrators. If any administrators have been identified or selected, provide their names and qualifications.
- e. Support staff.
- f. Others.

TRS is committed to Every Student Succeeds Act (ESSA)-The State of Oregon, its communities, school districts, and schools all share a responsibility for the success of each student. Improving outcomes for students will require a collective commitment, from all of us, to share responsibility and work together to create a more equitable, well-rounded, and engaging education that can sustain change within each local community's unique context across our state.

Lead Teachers will require:

- Bachelor's Degree
- Current appropriate Oregon teaching certification
- Montessori Teaching Certification
- Hold or be pursuing an ELL endorsement
- Preferred: Second language fluency
- Teachers Standards and Practices Commission (TSPC).
- Ability to pass criminal background screening

Assistant Teachers will require:

- Associates Degree and/or Bachelor's Degree
- Montessori Assistant Certification or be in process of achieving the certification
- Ability to pass criminal background screening
- Preferred: Second language fluency
- Preferred: Experience working with young children in diverse settings

Hannah Do, founder of TRS, will be the director. Mrs. Do holds two Bachelor degrees, Global Health and Political Science, and a Master's Degree in Global Health. She currently works as a Director of Operations at Scribe-X to manage the operations team and ensure optimal quality for the services. She has worked to develop curriculum to meet standards required for medical documentation which she has used to educate and train over 1000 medical scribes. She was Montessori educated from birth to age 14. Mrs. Do is well versed in the Montessori curriculum and will be knowledgeable in Oregon State Standards.

Principal/Director will require:

- Masters Degree

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- Montessori experience
- Montessori Administrator Certification (obtained within first year)
- 5 years of managerial and/or leadership experience
- Instructional Design Experience
- Knowledge of Oregon Charter Law

Nina Moore, co-founder of TRS, is the educational consultant. She holds a Master Degree in Education, with a concentration in Montessori Pedagogy, Montessori Certification for ages three through 12, a mother of three Montessori educated children and a former Montessori teacher in the Phoenix Public School District.

One office manager will be hired to assist the director in the day to day operations of TRS. Qualifications will include:

- College Degree or equivalent.
- Experience as an office or school manager
- Ability to pass a background check to work in a school environment

No plans to hire a counselor at this time.

2. Explain how professional development needs will be identified and met for teachers and teaching staff.

Professional learning is an integral part of school culture and developing staff.

- TRS will survey teachers to gauge which topics they are interested in. This will help identify staff needs as well as areas where teachers want to grow.
- TRS will offer choice, teachers will have the option to self-select topics aligned with their own personal professional learning goals.
- TRS will offer opportunities for teachers to facilitate Professional Development as an opportunity for teachers to step into leadership without leaving the classroom.
- TRS will incorporate collaborative protocols and practice times to promote active engagement so that teachers are involved in the learning process and not passive participants. This includes practice time with feedback, co-construction of knowledge, discussions, inquiry, problem solving, modeling, and self-reflection opportunities.
- TRS will include extension activities for teachers to extend their learning through curated resources in a platform of their choosing; a podcast, article, blog entry, or video related to the learning outcomes as a follow-up.

TRS believes by including teachers' voice, choice, and active engagement, will build their capacity. When teachers authentically learn, student achievement is increased. Pedagogical support will also be provided with professional Montessori classroom observation and consultation or Montessori trainers providing in-service training to the whole staff. Teachers and instructional assistants will work with the school administrator each year on a professional development plan. They will complete a goal setting exercise to customize and plan individual professional development tasks for the year. The licensed staff's plans will be approved, in writing, by the school administrator. In addition, staff members will be responsible for maintaining a log of all professional development activities.

3. Explain how professional development needs will be identified and met for administrators, support staff, and other staff.

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TRS recognizes the importance of extensive professional development opportunities for all staff members. Professional development will be provided to administrators, support staff and other staff through various school-wide and individual opportunities. TRS will observe the same teacher in-service days as the PPS in order to support staff development. Administrators, support staff and other staff will be encouraged to attend all professional development opportunities provided by PPS and TRS. Topics will include, but are not limited to, Montessori pedagogy, Oregon State Standards, Oregon State Assessments, Classroom Management, ELL, and Special Education topics.

The professional development calendar for TRS will align with the PPS professional development schedule, and will be augmented with Montessori-specific training opportunities. TRS will seek professional Montessori development opportunities from Montessori Associations such as the American Montessori Society (A.M.S.), Association Montessori International (A.M.I.) and the North American Montessori Teacher Association (N.A.M.T.A.). Professional development will be an on-going and an integral part of TRS's long term school improvement plan.

4. Describe the plan for providing professional development specifically focused on racial equity and cultural responsiveness.

The Director of TRS will actively seek out professional development opportunities focused on racial equity and cultural responsiveness for all teachers, assistant teachers and staff to attend. Once identified will be included in the Professional Development calendar.

This training will include but will not be not limited to:

- Teaching for Equity and Justice
- Working with Facing History
- Establishing Brave Space for an Adult Learning Journey Centering Equity
- History of Race, Racism, and Educational Inequity
- Critical Consciousness for Equity-Based Work
- Building Teacher Efficacy and Student Agency

TRS will actively seek and locate training series that enables the whole school to be intentional about implementing more equitable educational policies and more equity-based and culturally mediated practices in the classroom. The hope is that the teaching staff gain awareness of mindsets they may take for granted as they increase their awareness of the societal barriers their students face. It is the goal that this awareness empowers the teaching staff to raise their expectations for their students, resist negative stereotypes associated with students' communities, and place a greater emphasis on improving instruction rather than citing deficiencies in students when they are not learning. TRS administrators will gain awareness in order to create systems and structures around scheduling, discipline, student voices, and whole-school events and programs that are more reflective, inclusive, fair and culturally responsive.

5. Explain the plan for providing child nutrition.

TRS will have a nutrition program to help support our students' learning environment. This program will be developed via kitchen space within the school, food pantry supplied with donations from parents, local grocery stores, and local restaurants; and students bringing their own lunch. We will work with Partners for Hunger-Free Oregon (<https://oregonhunger.org/school-meals/>) to set-up lunch programs through the National School Lunch Program (<https://www.fns.usda.gov/cn/applying-free-and-reduced-price-school-meals>) by applying to be an operator of a program and providing our families with resources to apply.

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Additionally, we will work with local businesses (<https://alberta.coop/change-for-change/>) and organizations (<https://urbangleaners.org/need-food>) to create a school pantry to provide snacks for students during the school day.

6. Explain the plan for providing transportation.

TRS will comply with the transportation requirements for students who participate in district sponsored alternative programs and who transfer between neighborhood schools. At this juncture, TRS will depend on parents for the transportation of their children to and from school through parent transportation and carpooling.

TRS hopes to be located within neighborhoods that allow for walking and biking to school. Once the location is determined, we will provide families public transportation routes that serve the neighborhood. We plan to partner with the Oregon Department of Transportation with their Safe Routes to School Program to provide education for our students about safely traveling to and from school by walking, biking, or taking public transportation.

If our determined location falls on the bus route of a current school with transportation services, we will coordinate with the schools and TRS families to determine the best options for pick-up and drop-off.

7. Explain the plan for providing co-curricular activities (if any).

TRS will provide co-curricular activities that complement the current course of study through art, music, theater, dance, culinary arts and more. In addition, at the end of a learning cycle specific days are designated for 'Explore & Experience Studies' (EES) that will focus on special week-long programs engaging the students in experiential learning through outside specialists to expose the students to more in-depth practice of the sciences, language arts, mathematics, cultural studies, art, music, theater, etc.

TRS will extend the Physical Education Curriculum developed by a Montessori certified educator, 'After Cool Fitness', to be offered as an after-school program. This program complements the Montessori Method by focusing on developing greatness through play.

8. Explain the plan for providing counseling (if any).

TRS will work with Portland Public Schools to develop a plan for counseling.

Performance and Accountability:

1. State the school's specific annual student performance goals, as defined by the school. Explain how they are measurable for the proposed term of the charter.

TRS will measure student progress through Oregon state tests, known as ELPA and Smarter Balanced, to collect adequate yearly progress data (AYP). The goal is for all TRS students to demonstrate proficient or advanced competencies in English, Language Arts and Math as defined in the Oregon standards.

2. State the school's other specific goals. Explain how they are measurable. (Examples might include goals for parent involvement or staff training or professional development.)

The philosophy of TRS dictates that the accomplishment of performance outcomes is achieved by working to develop positive character traits in students while they learn. Montessori education

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integrates outcomes and the learning process. For example, independence is a behavior that is not separate from the process by which it is attained and practiced.

Similarly, academic competence is the disposition to do things in certain ways, the ability to recall knowledge and the skills to enact appropriate academic procedures.

Consequently, in addition to Oregon's published standards TRS will focus on developing several attributes of successful learners and positive character traits in our students.

For each of the following ten attributes, teachers will report on each student's individual progress both in the parent-teacher conference, and the yearly written progress reports.

- a. Cognitive Understanding and Thinking Skills
- b. Academic Skills and Content Knowledge
- c. Confidence and Competence
- d. Independence
- e. Autonomy
- f. Intrinsic Motivation
- g. Ability to Handle External Authority
- h. Social Responsibility
- i. Stewardship and Citizenship
- j. Positive Self Image

The teachers will assess each student's progress through:

- a. Formal Presentation
- b. Oral Examination
- c. Ongoing Teacher Assessment
- d. Portfolios
- e. Peer Teaching
- f. Rubrics
- g. Self-Evaluation

As the school community does not just consist of the students, teachers, and administrators, the school has additional goals regarding parent/guardian involvement. Parent/Guardian involvement is necessary for student success. Parent involvement will be measured by participation in school activities, attendance in "bring your person to school" days (1 required per year), and participation in parent workshops as hosted by the schools.

3. Explain the school's plan to use student and school performance data to inform and adjust its education program, supports for learning, and school improvement plan.

The Executive Director of TRS will present an annual report to its Board of Directors, parents, and teachers about the status of the school's educational programs and student outcomes. This report is presented to the TRS Board following the end of the academic year and is also distributed in writing to all concerned parties including the Portland Public Schools. This report includes the following information:

- The achievement of both the state required and non-required annual academic goals;
- An analysis of student performance in meeting the annual academic goals. The data is disaggregated by race and ethnicity to the extent feasible without compromising student confidentiality;

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- A summary of major decisions and policies established by the TRS Board during the year;
- Measurement of parent involvement in TRS;
- Summary and analysis of data from an annual parent and student satisfaction survey or feedback process;
- Plans for staff development, the number of staff working at the school and their qualifications;
- Summary of TRS's involvement in the surrounding community;
- Description of how TRS has implemented the means listed in the charter to achieve a racially and ethnically balanced student population;
- Analysis of the effectiveness of TRS's internal and external dispute mechanisms. Data regarding the number of disputes, complaints, and method of resolution;
- The state of the educational program as well as the administrative, legal, and governance operations relative to compliance with the charter.

TRS will foster a data-friendly culture where teachers and administrators seek reliable data to inform their decisions about curriculum and instruction. A first activity for professional developers is to explain the purpose of data: to identify goals for school improvement. A second activity is to encourage administrators and teacher leaders to reflect on how they make critical school decisions.

Data exploration is a task that is best accomplished by a broad-based team of educators. A team effort is crucial to the success of data-driven decision making including input from multiple points of view is useful in order to interpret the data and brainstorm solutions. A broad-based approach builds consensus and buy-in, which helps sustain the decisions that are to be made. The team for TRS will include the principal/director and teacher representatives from each grade level.

Four types of data will be used as indicators of TRS's success and progress:

- Achievement Data: standardized test scores, classroom-based assessments, rubric-scored writing portfolios, and class grades
- Demographic Data: enrollment, student mobility, attendance, disabilities, ethnic background, limited English proficiency, economic status, gender, dropout rates, and behavioral problems
- Program Data: curriculum scope and sequence, academic programs, teacher training and experience, professional development, afterschool programming
- Perception Data: academic standards, school leadership, quality of instruction, and school climate.

The next steps will be to:

- Organize the data: create a checklist for each of the four areas
- Analyze the data: identify strengths and weaknesses across the major academic areas, identify specific demographic groups that need academic improvement, and determine which programs are meeting or not meeting their goals
- Summarize the Analysis: prioritize TRS's strengths and problems that have emerged from the data, publicize these strengths to the community, rank-order the problems in terms of urgency, with the most urgent getting a rank of 1 and so on. Tally the rank orders to create a final list that takes into account everyone's rankings.
- Execute the Improvement Plan: set concrete goals, develop strategies for achieving those goals, determine how to evaluate progress, and roll out the plan

4. Describe how the charter school will provide its students equal access to participation in its programs or activities.

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TRS is non-sectarian in its programs, admission policies, employment practices, and all other operations. The school will not charge tuition for the charter program, and does not discriminate on the basis of race, ethnicity, national origin, gender, or disability. TRS will provide equal access to students with disabilities to participate in all aspects of the program, including field trips, extra-curricular activities, and non-academic services complying with Free and Appropriate Education (FAPE).

Section 7: Value vs. Adverse Impact

ORS 338.055(3)(f): Whether the value of the public charter school is outweighed by any directly identifiable, significant and adverse impact on the quality of the public education of students residing in the school district in which the public charter school will be located.

1, Explain why a public charter school was selected as the desired educational option for the grade levels and target population(s). Compare and contrast the charter school option to other options already available in the district.

A public charter school was selected for TRS for two reasons: increased autonomy with curriculum and increased access to quality education. A traditional public school would eliminate the ability to utilize the Montessori curriculum. The Montessori curriculum is one that the founders of TRS believe in wholeheartedly. Creating a traditional private school would limit the access to a quality Montessori education for many students. Even with tuition assistance, many families would not be able to afford to send their child through the entire program. There is one private Montessori school that serves students age 3-14 in Portland. To send a child through their entire program would cost \$175,600, not taking tuition changes into consideration. This is limiting to the students/families of the Portland community. We felt the public charter school would be the best route to achieve our goals.

Per ORS 338.015, a charter school should be designed to:

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

As described previously, the current public and public charter schools do not always meet the students' needs. The Montessori Method has shown success in student learning and academic achievement. Additionally, the method allows us to meet the needs of the student and help them to explore their interests.

Currently, there is one public Montessori school serving students 1st-8th grade. By adding another public charter Montessori school to the community, we hope to increase options and decrease the burden of a single choice. This creates smaller classroom environments in both TRS and the other existing charter schools in the community to work together and better serve the students.

Another goal of TRS is to create a Montessori training center to increase professional development for the teachers.

2. Describe the proposed plan for the placement of public charter school teachers, other school employees and students of the public charter school upon termination or nonrenewal of the charter.

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In the event that TRS loses its charter status through revocation or non-renewal, TRS Board and Director will work with the Superintendent and the School Board of Portland Public Schools to assist students in securing enrollment in a suitable public school. Every effort will be made to ensure that students experience nominal disruption in their education.

To the extent possible, TRS will also assist teachers and other employees in identifying suitable professional education employment opportunities elsewhere.

Also, in the event of closure, TRS will render all assets purchased with public funds to the State Board of Education for disbursement in accordance with ORS 338.105(6).

3. Describe how and where enrollment trends of district schools may be affected if the proposed charter school opens.

In our outreach, many people we met expressed great interest in TRS and wanted to plan ahead due to the nature of the waitlists with current school options. We met with parents who currently have children in private schools or are homeschooling, but expressed desire for other options. We are confident that we would bring students into the district via the homeschool and private school sector. This was especially prevalent when parents mentioned the waitlist at the other public Montessori school of over 100. We seek to add to the community by providing options for these families. However, people did express hesitation due to their not being a “true” school for them to apply to at this time.

In our first year, we planned for 80 spots. That is currently 0.6% of the elementary student population currently enrolled in the north and northeast communities of Portland. We then hope to grow that number as described in our enrollment plans. Our initial enrollment numbers are essentially the number of students who were displaced by the closing of the public charter school in 2021. By adding an additional school, there would likely be a decrease in enrollment in surrounding schools as other options are available. However, as it is a small number, we do not expect surrounding schools to experience a significant impact to their classroom numbers. As part of our goal is to create smaller classroom sizes/decrease the student: teacher ratio, we hope that the addition of another school can assist in helping other schools achieve this goal as well.

The Portland State University, “Portland Public Schools Enrollment Forecasts 2021-22 to 2035-36” indicates many factors regarding student enrollment. Though, population of the district has increased over the last decade, there has been a decrease in enrollment. A lot of this is suspected to be related to the current COVID-19 pandemic. However, there has also been a decrease in fertility rates with a median age of birth parent being 33 years old. Per the 2019 data, the majority of the population fell in the 30-34 age range. Though the research predicts the decrease in enrollment, the 2030 school year is meant to have an increase. This is likely related to the population of 30-34 district residents who will potentially have children in the school districts. By establishing the school now, we hope to have an established program to help manage the enrollment trends.

Section 8: Special Education

ORS 338.055(3)(g): Whether there are arrangements for any necessary special education and related services for children with disabilities pursuant to ORS 338.165.

1. Describe the arrangements for any necessary special education and related services provided pursuant to ORS 338.165 for children with disabilities who may attend the public charter school.

TRS will ensure compliance with all federal and state laws, as well as district policies for students with special needs.

TRS will fully comply with state and federal regulations governing special education. If a new special needs student comes into TRS with an IEP, a team meeting will be held with staff and parents to determine how best to meet the child's needs in the new school setting. The school will send a student list to the Student Service Department within 10 days of the lottery or enrollment for each child in order to identify and resolve any needs for services before the start of school.

Extra assistance will be provided to children on Individual Educational Plans (IEPs). There will be ongoing consultation between teachers and staff. When necessary, direct services in the form of a "pull-out" from class will occur. Generally, students will be able to participate in the classroom activities because the Montessori educational model is well suited to children with different needs and learning styles. There is an emphasis for all children to work at their own pace, using an individualized program, and multi-sensory materials. If necessary, Special Needs children who attend TRS will have their individual learning contracts modified to comply with requirements of their IEP.

Aides will have access to all of TRS' educational materials. TRS will provide all materials necessary to administer each student's IEP.

Specific methodologies, data collection systems and service delivery models will be entirely dependent upon each student's IEP. These will be developed in cooperation with the district and parents. TRS will coordinate with Portland Public Schools Student Services Department to decide for any necessary special education and related services. Pursuant to Oregon charter school law (ORS 338.165), Portland Public Schools will retain the responsibility for providing special education and related services to students who attend TRS and are eligible for special education services. (resident district).

2. Explain how the instructional program will be differentiated or otherwise designed and implemented to meet the needs of special education students.

The Montessori Method is an historically proven model of education that has consistently demonstrated its merit. With its conception and early success in serving children with special needs, it has since flourished worldwide as a means to meet the needs of all children. Student learning best occurs when children are successfully connected to the materials and curriculum. Through repetition and exploration, various concepts and ideas are explored. Montessori materials are self-checking and placed in a sequential order where the students can manage and track their own progress. This design of the materials promotes self-confidence and independence, as well as academic success.

Tapping into prior knowledge, learning is enriched by the repeated use of materials with which students are already familiar, and reinforced by using these materials at higher levels, eventually working toward abstraction.

Section 8 - Pg 2

Learning is also accentuated by teachers using a holistic curriculum. Teachers blend learning modalities (e.g. kinesthetic, visual, and auditory) as children learn about geography, history, science, and culture. Teachers present ideas and then encourage that they be shared, discussed, and evaluated. Children eventually engage in research and other high-level thinking activities.

Appealing to the whole child, emphasis is placed on creating aesthetically beautiful classroom environments where students feel safe and secure and invited to develop themselves in all facets of their persona and growth. The Montessori method also stresses the importance of building trust and confidence that helps connect our students to the materials and curriculum. When students are offered a safe and stimulating environment where they can be challenged and successful, they are able to reach their full potential.

TRS believes that learning best occurs when:

- Students are actively engaged in meaningful tasks;
- A connection is made between what students learn and the real world in which they live;
- Individual plans and support play an intrinsic part of the educational program;
- Students have some choice in the structure of their own projects and plans;
- Work is accomplished individually and as members of a group;
- Activities are integrated and meaningful;
- Work is developmentally appropriate, leads to success, and is progressively complex;
- Meaning is constructed from experiences;
- Students are encouraged and expected to learn;
- Teachers, family, mentors, and advocates support the students;
- Students are encouraged to help others learn and to learn from others, which leads to an improvement of communication skills and positive social behavior

TRS believes that this learning occurs in a Montessori Classroom, which encourages self-motivation and self-direction. Dr. Montessori's methods are based on her scientific studies of how learning best occurs. She found the following to be important aspects of positive learning:

- Multi-age, skill/readiness-based class groupings
- Interdisciplinary, project-based learning
- Individualized lessons and learning in small group settings
- Use of a prepared environment and hands-on materials which are progressive in complexity and often self-correcting
- A flexible time-line which allows introduction of new material when it is most likely to impact the individual
- Individual Learning Plans
- Low student-to-teacher ratios.

Montessori Methodology emphasizes respect for the individual child, and his or her pace, rather than the prioritization of specified curriculum or method of instruction. Maria Montessori stated, "Education is not something which a teacher does, but... it is a natural process which develops spontaneously in the human being." Our goal, then, is to provide the child with the appropriate ability-level material and personnel resources (teacher/facilitator) to promote his/her personal achievement. It is our belief that the cultivation of each child's innate desire to learn is of primary importance. Accordingly, our pedagogical strategies embrace the concept of the child's ownership of his or her education, through the presentation of choice of activities. We also support the child's fulfillment of his/her sense of discovery, as well as his/her expanded exploration of topics of interest. Ultimately, in recognizing Maria Montessori's belief that "the most favorable time for a child to learn is when she wants to do it herself," we are promoting the child's sense of independence, resulting from his or her sense of self-sufficiency and achievement.

Section 9: Prior History

ORS 338.055(3)(i): The prior history, if any, of the applicant in operating a public charter school or in providing educational services.

1. Describe the prior history of any of the founding members of the charter school or any of the members of the charter school's board in operating a public charter school.

Nina Moore assisted with developing a charter school for a Montessori school in Phoenix, Arizona.

Though Hannah has not worked to directly open a charter school, her position on an operations team and as a manager will be an asset to setting and completing goals, developing processes, and expanding curriculum to meet the needs of the school.

Chandon Thorell was a middle school teacher at a charter school in Phoenix, AZ. He then oversaw the middle school program.

2. Describe the prior history of any of the founding members of the charter school or any of the members of the charter school's board in operating a 501(c)3 nonprofit organization.

Nina Moore, co-founder of TRS, has an extensive background in operating a 501(c)3 nonprofit organization. For several years, she was the Vice-President of a company tasked with overseeing several Charitable Remainder Trusts (CRT) for families with funds in the millions required to award 5% of their funds per year to verified nonprofit charity organizations, Nina performed all due diligence necessary to determine worthiness of the recipient organizations. Once determined, she advised the CRT on their giving. Later, Nina used her knowledge of what the donors expected from a nonprofit organization and consulted with nonprofits through grant writing, capital campaigns, letters of intent, fundraising strategy and more. From there, Nina was offered Director of Trust Administration by a nonprofit organization specializing in First Party Trusts, Third Party Trusts, Minor Trust and Education Trusts providing oversight of over 800 trusts in 48 states.

3. Describe the prior history of any of the founding members of the charter school or any of the members of the charter school's board in providing educational services.

Nina Moore, a certified public school teacher also Montessori trained and certified, ages three through 12, taught in the Phoenix Elementary School District No. 1 as an Upper Elementary classroom, ages nine to twelve years of age.

Chandon Thorell was a middle school teacher at a charter school in Phoenix, AZ. He then oversaw the middle school program.

Thea Klever has taught Kindergarten and First Grade in the Seattle Public School District 2 years.

Exhibit 1

EXHIBIT I PROJECTED CHARTER SCHOOL ENROLLMENTS and STAFFING RATIOS

NAME of PROPOSED CHARTER SCHOOL: The Rhiza Schoolhouse

This exhibit is to determine the proposed charter school's projected total enrollments and staffing ratios. Enter the projected enrollment and staffing ratios at each grade range. If a grade range does not apply, enter NA. Complete next page as well. Use the data when appropriate to respond to a section of the charter application. If the school will not be fully enrolled by year 6, add rows to indicate projected enrollment and staffing ratios until fully enrolled.

	Enrollment Grade K	Enrollment Grades 1-8	Total Enrollment	Total # Teachers	Total # Staff (Includes Teachers)	Student/Teacher Ratio Grade K	Student/Teacher Ratio Grades 1-8	Total Student/Teacher Ratio	Student/Staff Ratio Grade K	Student/Staff Ratio Grades 1-8	Total Student/Staff Ratio
Year 1	20	60	80	6	8	10:1	15:1	13:1	3:1	8:1	10:1
Year 2	20	60	80	6	8	10:1	15:1	13:1	3:1	8:1	10:1
Year 3	20	90	110	8	11	5:1	15:1	14:1	2:1	8:1	10:1
Year 4	20	114	134	12	15	5:1	15:1	12:1	2:1	9:1	9:1
Year 5	20	138	158	13	16	5:1	15:1	12:1	2:1	9:1	9:1
Year 6	20	138	158	13	17	15:1	12:1	12:1	1:1	8:1	9:1

2023-2024: 1 primary, 1 lower elementary, 1 upper elementary
Total Students K-6: 80

2024-2025: 1 primary, 1 lower elementary, 1 upper elementary
Total Students K-6: 80

Total Students Preschool (3-4 years): 18

2025-2026: 2 primary, 2 lower elementary, 1 upper elementary
Total Students K-6: 110

Total Students Preschool (3-4 years): 40

2026-2027: 2 primary, 2 lower elementary, 1 upper elementary, 1 middle school
Total Students K-8: 134

Total Students Preschool (3-4 years): 40

2027-2028: 2 primary, 2 lower elementary, 1 upper elementary, 1 middle school
Total Students K-8: 158

Total Students Preschool (3-4 years): 40

EXHIBIT I (CONTINUED)

PROJECTED CHARTER SCHOOL ENROLLMENTS and STAFFING RATIOS

In the space below, describe the methods used to collect the data for Exhibit I.

The data in Exhibit I was determined based on population data, current enrollment in the Portland Public School District, waitlist data from current public charter schools, and closure of charter schools in the last two years. There are currently ~100,000 children in Portland aged 0-14. Currently, there are no public charter Montessori schools in Portland serving ages 3-14.

Between the two charter schools that were up for renewal in 2021, there was an average wait list of 115 students in the Kindergarten age group, 31 students in 1st grade, 18 students in 2nd grade, 10 students in 3rd grade, 6 students in 4th grade, and 5 students in 5th grade. TRS plans to open with 20 spots for Kindergarten based on this information. The lower elementary (1st through 3rd grade) and upper elementary (4th through 6th grade) classrooms will have 30 students each. We will balance these classrooms with 10 students in each grade as much as possible, but will adjust as needed based on enrollment and needs of the community.

Though we hope to retain all of our students until graduation from our school, we understand there will likely be losses as students move to 1st grade, 3rd grade, and 5th grade based on the set-up of other schools within the district.

Exhibit 2

EXHIBIT II CALENDAR and INSTRUCTIONAL TIME

1. Provide the proposed school calendar for the public charter school, including the length of the school day and school year.

TRS will have a year-round model to best serve the student population and their families. It would begin on the first Tuesday after Labor Day and conclude on the last Friday of July. All students will participate in the annual number of instructional hours required by the state: 900 hours for students in grades K-8 (as required by Oregon Administrative Rule (OAR) 581-022-2320 - Required Instructional Time).

This yearly calendar provides the required instruction days plus additional days designated for 'Explore & Experience Studies' (EES) that will focus on special week-long programs engaging the students in experiential learning through outside specialists to expose the students to more in-depth practice of the sciences, language arts, mathematics, cultural studies, art, music, theater, etc. The proposed calendar is described in Appendix B.

TRS will have a seven-hour school day Monday through Friday, 8:00am-3:00pm.

2. Include how the proposed calendar and hours of instruction meet or exceed the minimum annual hours of instruction by grade levels required by Oregon Administrative Rule 581-022-2320, Required Instructional Time.

Oregon Administrative Rule 581-022-2320, Required Instructional Time requires students in grades K-8 attend be scheduled for 900 hours of instructional time in a school year.

The proposed calendar will exceed the minimum required 900 hours per year with approximately 320 hours of additional instruction through special programs during the 'Explore & Experience Studies' (EES) as mentioned above.

The Rhiza Schoolhouse

2023 to 2024

September 2023						
S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

5 – First Day of School

October 2023						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

9 – No School: Indigenous People's Day

November 2023						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

10 – No School: Veteran's Day

13-17 – EES Week 1

16-17 – Parent Teacher Conferences

20-24 – No School: Thanksgiving Break

December 2023						
S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

18-31 – No School: Winter Break

January 2024						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

1 – No School: New Year's Day

2 – Return to School

15 – MLK In School Day of Service

16-19 – EES Week 2

February 2024						
S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29		

19 – No School: President's Day

March 2024						
S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

25-29 – EES Week 3

28-29 – Parent Teacher Conferences

April 2024						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

1 – No School: Easter Monday

15-19 – No School: Spring Break

May 2024						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

28 – No School: Memorial Day

28-31 – EES Week 4

30-31 – Parent Teacher Conferences

June 2024						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

15 – Juneteenth In School Day of Service

July 2024						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

4-5 – No School: Independence Day

25 – Last Day of School

28-31 – EES Summer – Sign Up Required

August 2024						
S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

1-31 – EES Summer – Sign Up Required

Exhibit 2 - pg 3

TRS Instructional Time (Yearly)

	Start Time	End Time	Lunch	Recess	Instructional Minutes
K	8:00 AM	3:00 PM	30	30	360
1	8:00 AM	3:00 PM	30	30	360
2	8:00 AM	3:00 PM	30	30	360
3	8:00 AM	3:00 PM	30	30	360
4	8:00 AM	3:00 PM	30	30	360
5	8:00 AM	3:00 PM	30	30	360
6	8:00 AM	3:00 PM	30	30	360
7	8:00 AM	3:00 PM	30	30	360
8	8:00 AM	3:00 PM	30	30	360
K-8	7 hours (420 minutes) - Lunch/Recess (60 minutes) = 360 minutes (6 hours)				
	6 hours/day x 186 days = 1116 hours (Regular School Days)				
	6 hours/day x 18 days = 108 hours (EES Days)				
	1116 hours + 108 hours = 1224 instructional hours				

Exhibit 3

EXHIBIT III POTENTIAL CHARTER SCHOOL STUDENTS ATTENDING PPS and OTHER SCHOOLS

NAME of PROPOSED CHARTER SCHOOL: The Rhiza Schoolhouse

This exhibit is to determine the number (N) of the proposed charter school's potential students, who have documented interest in attending the charter school, who currently attend Portland Public Schools, private schools, other districts, or who are homeschooled. **Enter each school name alphabetically in the appropriate columns. Enter the number (N) of potential charter school students currently attending each school. If a grade range does not apply, enter NA in the first school name cell and enter zero (0) in the N cell.** Add rows if necessary. Complete the next page. Use the data when appropriate to respond to a section of the charter application.

PPS Schools that include Grades K-8	N	Other Districts: Public Schools K-12	N	Resident Districts of Home-Schooled Students in Grades K-12 (include PPS)	N	Resident Districts of Privately Schooled Students in Grades K-12 (include PPS)	N
Kairos	3			Homeschool	2		
TOTAL	3	TOTAL		TOTAL	2	TOTAL	

EXHIBIT III (CONTINUED) POTENTIAL CHARTER SCHOOL STUDENTS ATTENDING PPS and OTHER SCHOOLS

- 1. Describe the methods used to collect the data for Exhibit III. Attach sample/template copies of surveys or other materials used to collect the data.**

From the surveys we collected, the schools indicated were as noted above. Many people we met expressed great interest in TRS and wanted to plan ahead due to the nature of the waitlists with current school options. We met with parents who currently have children in private schools or are homeschooling, but expressed desire for other options. We are confident that we would bring students into the district via the homeschool and private school sector. This was especially prevalent when parents mentioned the waitlist at the other public Montessori school of over 100. We seek to add to the community by providing options for these families. However, people did express hesitation due to their not being a "true" school for them to apply to at this time.

The TRS founders will continue partaking in community events (i.e. farmer's markets, festivals), developing more of a social media presence, lead informational meetings in-person and virtually, outreach to local businesses, and seek opportunities for existing community meetings (i.e. neighborhood associations). We will partner with Schola.com to create an appropriate system to ensure we are reaching the families who need it the most.

- 2. Explain how the data from Exhibit III provides quantifiable data demonstrating sufficient demand for the proposed charter school from teachers, parents, students, and other community members.**

Unfortunately, the number of students alone does not demonstrate the demand for the charter school. When looking through the data and school's performance, there is a need for additional schools, additional learning options for students, and opportunities to grow the teachers in Oregon.

The current Oregon state average for student to teacher ratio is 20:1. This means 640 teachers would be required to serve all of these students. The national average is 17:1. Many studies have shown the smaller student to teacher ratio, the higher the performance and success of the students. In order for the Portland Public Schools to reach that ratio, there would need to be 753 teachers working. Adding additional schools would allow for the students to have more options for alternative education that is accessible, allows the distribution of students, and allows for more opportunities for teachers within the community. There is currently a public Montessori school available in Portland. Their most recent data shows a 27:1 student to teacher ratio. Adding in TRS would help to support the other schools in the community by decreasing burden which can help retain teachers and support the students. The goal would be to add to the community of existing schools rather than compete with them.

Exhibit 3 cont...

An additional public Montessori school would help increase access to alternative education that has been proven to be successful. Many of the listed schools have students struggling to meet the expectations for reading and math. This is particularly evident in schools where there is a higher percentage of students of color. Per the audit from the Secretary of State published in January of 2019, this was a significant issue with the Portland Public Schools. A Montessori education can meet the children where they are and support their growth academically, socially, and emotionally in a culturally sensitive manner.

This is compounded by the two charter schools that have closed in the last three years which have and will inevitably add burden to the existing schools.

Exhibit 4

EXHIBIT IV PARENT/FAMILY SURVEYS

1. Provide completed parent/family surveys. Evidence of parent and student support must represent students who will be in the grade levels served during the proposed term of the charter. Parent/family surveys must include at minimum:
 - a. the number of potential students in each household;
 - b. where the student(s) attend(s) school currently;
 - c. the student's current grade.

Exhibit 4 cont...

Question:	Survey Respondent:	#1	#2	#3	#4	#5	#6	Totals/Summary
1	# of potential students in household	1	1	2	1	1	1	7 students total
2	Current School	Hancock St. Preschool	n/a, 2.5yrs old Preschool	KairosPDX Preschool/kg	Homeschool	n/a - infant	KairosPDX	4 total potential students in k-6 for 2023-24 school year
3	Current Grade of student(s)	Preschool	Preschool	Preschool/kg	1st	n/a infant	Kg	For 2023-24: 1-kg, 2-1st gr, 1-2nd gr
4	Type of school likely to attend in 2022-23	Preschool	Preschool	Charter	Charter	none - infant	Charter	
5	Extent agree with "I know what Montessori Method is" (5pt scale; 5="strongly agree" and 1="strongly disagree")	5	4	4	4	5	4	Strong understanding of Montessori
6	Extent agree with "...interested in learning more about Montessori Method" (5pt scale; 5="strongly agree" and 1="strongly disagree")	3	5	4	4	5	4	Moderate to strong interest in learning more about Montessori
7	How likely to enroll in public charter Montessori school (5pt scale; 5="very likely" and 1="not likely at all")	3	4	4	5	5	5	Neutral to very likely to enroll child in charter Montessori school
8	How likely to enroll in The Rhiza Schoolhouse (5pt scale; 5="very likely" and 1="not likely at all")	4	4	4	5	4	4	Likely to very likely go enroll at Rhiza Schoolhouse
9	What are your priorities in elementary school for your child(ren)							
	Academic performance	x		x	x	x	x	5 of 6 selected academic performance
	Social development	x	x	x	x	x	x	6 of 6 social development
	Parent/student community	x	x	x	x	x	x	5 of 6 selected parent/student community
	Alternative education			x		x	x	2 of 6 selected alternative education
	Small classrooms		x	x		x	x	4 of 6 selected small classrooms
	other						x-diversity, convenient location, adequate playground	1 of 6 selected "other" with comment
10	Interested in assisting with development of Rhiza Schoolhouse (y/n/m)	y	m	m	m	y	n	2 respondents "yes" (\$100,000+ income, White); 3 respondents "maybe" (\$60,000+ income, 2 White, 1 Black); 1 respondent "no" (\$100,000+ income, Vietnamese)
11	Household income	\$150,000+ non-Hispanic	\$150,000+ Hispanic	\$60,000-\$69,999 non-Hispanic	\$70,000-\$79,999 non-Hispanic	\$100,000-\$149,999 non-Hispanic	\$100,000-\$149,999 non-Hispanic	1 of 6 Hispanic
12	Ethnicity	White	White	Black	White	White	Vietnamese	4 of 6 White; 1 of 6 Black; 1 of 6 Vietnamese
13	Race	White	White	Black	White	White	Vietnamese	4 of 6 English only; 1 of 6 Eng/Spanish; 1 of 6 Eng/Vietnamese
14	Language spoken at home	English	Eng_Span	English	English	English	Eng, Vietnamese	

Exhibit 4 cont...

The Rhiza Schoolhouse Questionnaire

Hello!

Our names are Hannah and Nina. Over the past year, we have been working to develop a public charter Montessori school for the North and Northeast communities of Portland. We plan to submit our application in July of 2022 with the goal of opening the school in the fall of 2023.

Hannah was a Montessori student for 12.5 years. Nina earned her American Montessori Society (AMS) Teacher Certification and led an upper elementary Montessori classroom for 6 years. We both strongly believe this type of education should be accessible to all. Our passion for education and our strong belief in the Montessori method inspired us to open The Rhiza Schoolhouse.

Our dream is big, but it will start small. The Rhiza Schoolhouse will be a non-profit organization. For the first year we will welcome Kindergarten through 6th grade. Each year we will add another classroom including an infant, toddler, preschool (ages 3 and 4), and a middle school program.

The Rhiza Schoolhouse will offer:

An authentic Montessori curriculum - adapted for the 21st Century

Trained Montessori teachers

Two second languages - Spanish and American Sign Language

A year round calendar

Parent and Family Community

Montessori Training Program for aspiring teachers

There are many great schools in the North and Northeast communities of Portland. We want to expand the available options in our community to ensure each child is getting their needs met in an environment that best suits them. In order to best understand those needs, we ask that you complete the following survey.

If you have any questions about The Rhiza Schoolhouse or have interest in participating in the development of the school, please feel free to contact us at learn@therhizaschoolhouse.org.

We hope to hear from you soon!

Hannah and Nina

* Required

1. Email *

2. Number of Elementary School-aged students in the household *

Mark only one oval.

1

2

3

4

5

6

7

8

9

10

Other: _____

3. Name of your child's current school: *

4. Current Grade(s) of Students *

Check all that apply.

- Preschool
- Kindergarten
- First (1st)
- Second (2nd)
- Third (3rd)
- Fourth (4th)
- Fifth (5th)
- Sixth (6th)
- Seventh (7th)
- Eighth (8th)

5. What type of school are you likely to send your child to for the 2022 to 2023 school year? *

Mark only one oval.

- Public
- Private
- Charter
- Homeschool
- Online School
- Other: _____

6. Please rate the extent to that you agree/disagree with the following statement: I know what the Montessori Method of education is

Mark only one oval.

- Strongly Agree
- Agree
- Neutral
- Disagree
- Strongly Disagree

7. Please rate the extent to that you agree/disagree with the following statement: I am interested in learning more about The Montessori Method

Mark only one oval.

- Strongly Agree
- Agree
- Neutral
- Disagree
- Strongly Disagree

8. How likely would you be to enroll your student in a public charter Montessori school? *

Mark only one oval.

	1	2	3	4	5	
Not likely at all	<input type="radio"/>	Very likely				

9. If successful in our application, how likely would you be to enroll your student in The Rhiza Schoolhouse?

Mark only one oval.

	1	2	3	4	5	
Not likely at all	<input type="radio"/>	Very Likely				

10. What are your priorities in an elementary school for your child(ren)? *

Check all that apply.

- Academic Performance
- Social Development
- Parent/Student Community
- Alternative Education
- Small Classrooms
- Other: _____

11. Would you be interested in assisting with the creation and development of The Rhiza Schoolhouse?

Mark only one oval.

- Yes
- No
- Maybe

12. Parent/Guardian Names *

13. What is your household income?

Mark only one oval.

- Less than \$10,000
- \$10,000 to \$19,999
- \$20,000 to \$29,999
- \$30,000 to \$39,999
- \$40,000 to \$49,999
- \$50,000 to \$59,999
- \$60,000 to \$69,999
- \$70,000 to \$79,999
- \$80,000 to \$89,999
- \$90,000 to \$99,999
- \$100,000 to \$149,999
- \$150,000 or more
- Prefer Not to Say

14. Are you of Hispanic, Latino or Spanish origin?

Mark only one oval.

- Sí, mexicano, mexicano americano, chicano
- Yes, Puerto Rican
- Yes, Cuban
- Yes, other Hispanic, Latino or Spanish origin
- No, not of Hispanic, Latino or Spanish origin
- Prefer not to say

15. How would you best describe yourself?

Mark only one oval.

- American Indian or Alaska native
- Asian Indian
- Black or African American
- Chinese
- Filipino
- Guamanian or Chamorro
- Japanese
- Korean
- Native Hawaiian
- Samoan
- Vietnamese
- White
- Prefer not to say
- Other: _____

16. What languages are spoken at home?

Check all that apply.

- Chinese
- English
- French
- Japanese
- Korean
- Polish
- Russian
- Spanish
- Tagalog
- Vietnamese
- Prefer not to say
- Other: _____

This content is neither created nor endorsed by Google.

Google Forms

Exhibit 5

EXHIBIT V

SUPPORT for the PROPOSED CHARTER SCHOOL by EDUCATORS and COMMUNITY MEMBERS

NAME of PROPOSED CHARTER SCHOOL: The Rhiza Schoolhouse

This exhibit is to identify the individuals involved in the development and operation of the proposed charter school. List individuals and/or organizations. Describe their specific commitments to the development and operation of the school. Describe any contracts or other agreements made or to be made with an individual or group. Use the data when appropriate to respond to a section of the charter application.

Individuals and Organizations Involved in the Development and/or Operation of the Proposed School	The Individual's or Organization's Experience and Qualifications to Assist in the Development or Operation of the Proposed Charter School in One or More of These Areas: Curriculum, Instruction, Assessment, Budget, Equity, or Operations	The Services Each Individual or Organization Will Provide for the Development or Operation of the Proposed Charter School	Contractual or Other Agreements Made or to be Made With the Individual or Organization
Hannah Morris	Curriculum, Instruction, Assessment, Budget, Equity and Operations	Director of TRS	N/A
Nina Moore	Curriculum, Instruction, Assessment, Budget, Equity, Operations and Fundraising	Educational Consultant of TRS	N/A

1. Describe the methods used to collect the data for Exhibit V.

At this current juncture, the TRS founders are the key members of the development team. Though we have many members of our community who are willing and interested in participating in the development and operations of the public charter school, we do not currently have formal agreements in place. We have people who have verbally committed to assisting with web development, graphic design, logo design, grant writing, curriculum expansion, and community outreach.

TRS is a grassroots endeavor and will involve the community it will serve. The TRS Founders have done door-to-door and email campaigns with community members and local businesses. We have reached out to community members, business owners, educational institutions, and churches in the desired areas to build a TRS community from the community where it will live. We have received subscribers to our website, followers on our social media, completed surveys with expressed interest in participating in the development, and made many face-to-face connections with members of the community.

Email Campaigns:

- ulpdx@ulpdx.org
- marcus@coalitioncommunitiescolor.org
- jenny@coalitioncommunitiescolor.org,
- joliana@coalitioncommunitiescolor.org
- sol@coalitioncommunitiescolor.org
- damon@coalitioncommunitiescolor.org
- info@latnet.org
- KaelynR@nayapdx.org

Exhibit 5 cont.

- OscarA@nayapdx.org
- TamaraH@nayapdx.org
- GuilfoyleD@nayapdx.org
- AguilarE@nayapdx.org
- AnnT@nayapdx.org
- info@friendsofthechildren.org
- info@homeforward.org
- info@portlandoic.org
- lavert@allhandsraised.org
- lisa@allhandsraised.org
- alamedapdx@gmail.com,
- board@arborlodgeneighborhood.com,
- info@bwnapdx.org,
- boisenagmail.com,
- chair@cathedralparkpdx.org,
- chair@concordiapdx.org,
- cully@cullyneighbors.org,
- garymkunz@comcast.net,
- chair@eliotneighborhood.org,
- general@grantpark-na.org,
- info@hollywoodpdx.org,
- humboldtneighborhood@gmail.com,
- president@irvingtonpdx.com,
- knachair@gmail.com,
- kingnapdx@gmail.com,
- chair@overlookneighborhood.org,
- parkroseneighbors@gmail.com,
- shaunsullens@gmail.com,
- TDeRidder.rcpna@outlook.com,
- rna-pdx@googlegroups.com,
- sabin@necoalition.org,
- info@stjohnspdx.org,
- hansenk1324@q.com,
- sumner.neighborhood.chair@gmail.com,
- sandral@cnncoalition.org,
- mike.lambert@upnapdx.org,
- vnaboard@gmail.com,
- info@gowoodlawn.com,
- info@necoalition.org
- albinachristianlifecenter@gmail.com,
- office@bridgeportucc.org,
- hello@bridgetown.church,
- kaz@c3nepdx.com,
- christ.memorial.pdx@gmail.com,
- danielsmemorial@gmail.com,
- cameron@doorofhopepdx.org,
- office@gracecityportland.org,
- hello@grace-memorial.org,
- info@idcpdx.com,
- info@mosaicportland.org,
- necommunityfellowship@msn.com,
- PeaceCOB@gmail.com,
- info@portlandmetrochurch.com,
- info@portsmouthunionchurch.org,

Exhibit 5 cont...

- OurOffice@standrewchurch.com,
- pastor@thegroveschurch.com,
- office@weeastuu.org
- oma@oregonmontessori.org
- ed@oregonmontessori.org,
- OEAPresident@oregoned.org,
- annie.duncan@oregoned.org,
- suzie.lyda@oregoned.org,
- patpresident@oregoned.org,
- jennifer.dixon@oregoned.org,
- kelly.mckenna@oregoned.org,
- info@montessori-nw.org,
- LLanou@endeavorschools.com
- BlazersInfo@bgcportland.org
- CEI PDX
- Montessori in Real Life

Local Businesses/Organizations Currently Displaying or handing out our flyers:

- Rebuilding Center
- ¿Por Qué No? - Mississippi
- Q Center
- Albina Press
- Victoria Bar
- The Fresh Pot
- Black Wagon Kids Botique
- Pistils Nursery
- Tea Chai Te
- Cullen's Corner
- Carioca Bowls
- Alberta Market
- Radio Room
- Tea & Tea
- Green Bean Books
- Natural Grocers - NE Martin Luther King Blvd.
- Trade Up Music - Alberta
- Rudy's Barber Shop - Alberta
- Via Chicago Alberta
- Alberta Co-Op
- Cason's Fine Meats
- Portland Community College Cascade
- Multnomah County Library
- ReClaim It
- Multnomah County Library - North Portland
- Solabees Flowers and Botanicals
- Ethos Music Center

Pending approval, further outreach will be done to recruit additional board members, identify additional families, and recruit educators. We will reach out to community members, business owners, educational institutions, and churches in the desired areas to build a TRS community from the community where it will live. As we progress further in this process, further outreach will be done to establish formal contracts with our community and the community we hope to serve.

2. Attach copies of materials used to collect information from organizations or individuals

Email Campains:

Exhibit 5 cont...



GROW WITH RHIZA



PUBLIC MONTESSORI SCHOOL
KINDERGARTEN - 8TH GRADE
TWO SECOND LANGUAGES
AFTER SCHOOL PROGRAMS
YEAR ROUND SCHOOL

SCAN TO LEARN MORE



FALL 2023

The Rhiza Schoolhouse is looking to open in Fall 2023. Please reach out if you would like to take part in the development or support our school!
Email: learn@therhizaschoolhouse.org

Exhibit 5 cont...

Good Morning!

Our names are Hannah and Nina. Over the past year, we have been working to develop a public charter Montessori school for the North and Northeast communities of Portland. We plan to submit our application in July of 2022 with the goal of opening the school in the fall of 2023.

Hannah was a Montessori student for 12.5 years. Nina earned her American Montessori Society (AMS) Teacher Certification and led an upper elementary Montessori classroom for 6 years. We both strongly believe this type of education should be accessible to all. Our passion for education and our strong belief in the Montessori method inspired us to open The Rhiza Schoolhouse.

Our dream is big, but it will start small. The Rhiza Schoolhouse will be a non-profit organization. For the first year we will welcome Kindergarten through 6th grade. Each year we will add another classroom including an infant, toddler, preschool (ages 3 and 4), and a middle school program.

The Rhiza Schoolhouse will offer:

- An authentic Montessori curriculum - adapted for the 21st Century
- Trained Montessori teachers
- Two second languages - Spanish and American Sign Language
- A year round calendar
- Parent and Family Community
- Montessori Training Program for aspiring teachers

There are many great schools in the North and Northeast communities of Portland. We want to expand the available options in our community to ensure each child is getting their needs met in an environment that best suits them. In order to best understand those needs, we ask that you complete the following survey.

We were hoping that you would be willing to share us with your community. We have flyers we would be happy to provide and would be willing to present to your group. Additionally, we have a survey that can be filled out for any family that is interested in attending The Rhiza Schoolhouse or learning more.

- [Survey - English](#)
- [Survey \(Encuesta\) - Spanish](#)

We hope to hear from you soon!

--



Hannah Morris

Executive Director

Pronouns: She/Her

Email:

hannah@therhizaschoolhouse.org

Mobile: 602-740-0395

Website: therhizaschoolhouse.org

Exhibit 5 cont....

Social Media:

Activity

 Hannah Morris
Humboldt

Hello!

Our names are Hannah and Nina. Over the past year, we have been working to develop a public charter Montessori school for the North and Northeast
See more...

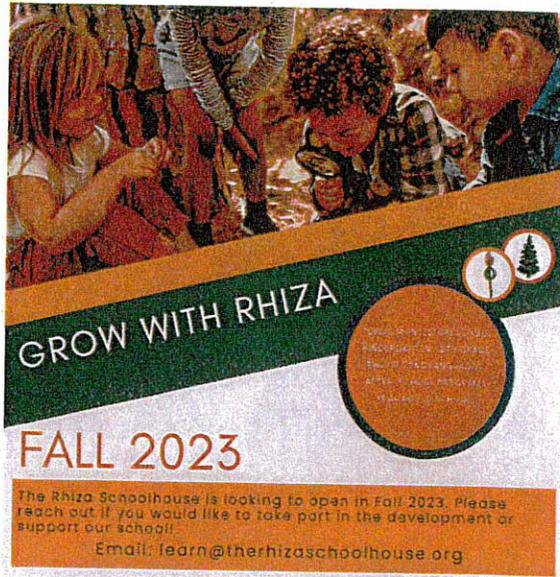
 The Rhiza Schoolhouse Questionnaire
docs.google.com

Posted in General to Anyone

 5

 Like  Comment  Share

 Add a comment...



Website Launched with Subscriber ability:
<https://www.therhizaschoolhouse.org>

Exhibit 6

**EXHIBIT VI
LETTERS of REFERENCE**

Attach at least three current letters of reference for each person and/or organization listed in Exhibit V from people familiar with their educational and organizational experience.

Exhibit 6 cont...

July 14, 2021

To Whom It May Concern:

When I first met Hannah Do (Morris), I was an assistant in a Montessori classroom. It was her first year in the primary classroom. As a student she was smart, engaged, thoughtful, and loving. As the years have gone on, I have remained in contact to stay up-to-date regarding her personal and professional life. It is without hesitancy that I recommend her for the position of Executive Director of The Rhiza Schoolhouse (TRS).

With her education and career choices, her passion for education has been apparent. She pursued an undergraduate and graduate degree in Global Health to make population changes for improved access to education. Throughout her undergraduate program, she worked with After Cool Fitness to lead physical education, recess, and after school programs with students across the Phoenix Metropolitan area. Within this role she focused to adapt the curriculum to fit the needs of each age group. Using her Montessori background, these adaptations emphasized the importance of providing each student with individual opportunities and resources to help them succeed.

Her experience with developing curriculum expanded as she entered her Master of Science in Global Health program. She focused on the health and education of Latinx communities with a specific focus on education access for women and girls. As part of the program, she worked with a local non-profit, Girls Inc., to develop materials for their College Readiness Program. This included leading weekly Girls' Groups at Woodburn High School to help the young women learn about their options for schooling following their graduation. Part of this program included the development and adaptation of goal setting materials to help these girls set achievable goals for their futures.

While pursuing her Master's degree, she continued to grow with her current company, Scribe-X. She currently acts as the Director of Scribe Services to lead the operations team to recruit, hire, and train medical scribes. In this role, she educates prospective medical providers as they apply to their desired professional schools. Additionally, she develops and expands the training curriculum and materials to meet the needs of the 300+ providers and 27+ medical specialties.

Her passion for education, knowledge of developing and evaluating curricula, and experience with managing operations will help her succeed in this new venture. Thank you for taking the time to review the application and the recommendation.

Sincerely,



Pamela Argust
Retired Montessori School Teacher
347-204-8928

Exhibit 6 cont...

Elizabeth Brandt
Human Resources Manager Scribe-X
931 SW King Ave. Portland, OR 97205
541-908-1121
elizabeth.brandt824@gmail.com
14 July 2021

To Whom It May Concern:

It brings me great pleasure to be writing this recommendation for my coworker and friend, Hannah Do (Morris). Hannah and I work together at Scribe-X, a Medical Scribe staffing company where we provide scribing services for medical providers across the west coast. In the 2.5 years that I've worked with her, I have come to know her as the single greatest person I have ever had the pleasure of working alongside. In my role as Human Resources Manager, and hers as the Director of Scribe Services, we have worked very closely to achieve company goals and maintain daily operations.

The education and training of our employees is the most critical factor in the success of our entire company. And over this, Hannah is the head. Without competent and skillful scribes, our customers would be unsatisfied and we wouldn't have a business. She has developed and instructed the curriculum that each employee is taught, which means that she is responsible for the success of hundreds of scribes at any given time. Though there is a quality threshold that must be maintained, she does everything in her power to meet each employee on their level to ensure they are successful and happy in their assignment. If there is someone who is struggling to meet the necessary performance metrics, she takes the time to offer personal and individualized insight, advice, and suggestions for improvement. She is passionate about the continuous improvement of our materials and education, the quality of our service, the success of our employees, and ways to improve their overall experience.

When it comes to everyday operations, Hannah's contributions are invaluable. She understands how every piece of the puzzle and every member of the team fits in with one another to create a cohesive whole. She is accountable to not only our scribes, administrative team, and company executives, but the medical providers and clinics that we work with. Hannah gracefully fields provider complaints about performance and/or behavior, navigates challenges with technology, and finds creative solutions to scheduling needs. As she oversees and assumes responsibility for operations, she challenges our administrative team members to achieve their full potential within their roles. Hannah is an incredible leader that is revered and admired by all who work with her. She works with our executives to create ambitious, but realistic and achievable goals, as well as develop long-term plans that will make our company better.

There is not one doubt in my mind that Hannah would create a school where children would thrive, discover their life's potential, and feel safe and cared for. Her personal experience with and dedication to education and learning is unmatched by anyone I've ever known. It drives her to bring that privilege to those around her. She speaks of her schooling with incredible fondness and passion that I know was also heavily instilled in her by her mother, now a partner in this school. She will put her heart and soul into every word, lesson plan, policy, and principle and will not stop until her school represents the best that education can offer. And it will be because her work is a reflection of herself and her work ethic, and that bar is high. She is a leader, a confidant, a disciplinarian when needed, and a cherished friend. I know you won't be let down by what she'll bring to the community, the children, and the families that she'll touch. I am continually impressed by her and know that you will be too.

Sincerely,
Elizabeth Brandt

Exhibit 6 cont. . .

After **COOL** Fitness
1711 E. Missouri Ave., #9
Phoenix, AZ 85016
602-916-0909

July 15, 2021

To Whom It May Concern:

I have known Hannah Do (Morris) for over twenty years as a family friend, middle school teacher, and employee. I first became a family friend through the shared interests and activities of Hannah and her family. Her dad and I became friends through photography classes that I taught at the Phoenix Center for the Arts and as soccer coaches for the City of Phoenix. Her mom was a fellow Montessori teacher and moved Meghan, Hannah's older sister, to Villa Montessori Middle School where I was a lead teacher and where Hannah later became my student.

Hannah's exceptional academic abilities began long before I had her in middle school, but I did get to see those shine for two years in 7th and 8th grade. Montessori education is about developing the whole child and at the middle school level children discover their sense of identity and autonomy on their journey to young adulthood, as well as advance their academics. Hannah is an incredible classroom learner and excelled in all subjects, always choosing to do advanced work. And as a lifelong Montessorian, she was an incredible teacher and mentor to her fellow classmates. Hannah was able to excel and work hard while having fun. I have incredibly fond memories of her and her classmates with many coming from the many multi-day trips that the students, teachers, and parents attended. This is also where my relationship with Hannah's parents deepened.

In the ten years of running After COOL Fitness, I have hired and trained several hundred young adults from the ages of eighteen to the mid-twenties. I would place Hannah in my top three. I did have the fortune to hire former middle school students of mine and even other students like Hannah who I maintained contact with during their high school and college years. Many of them did excel as an After COOL Fitness coach, and perhaps that was due to the length and depth of our relationship. However, Hannah has always been a step above others as both a leader and a member of a team.

Hannah began with After COOL just a year out of high school. We had very few coaches that understood how to coach middle school students, and Hannah was one of them. She understood the importance of consistency, and both how to be firm and playful. I knew when sending Hannah to a middle school program that she would both support and lead our other coaches to a successful program. The same experience happened over one summer when we had multiple sites running programs at the same time. I rarely visited her program because I knew it was being run well and because she is an excellent communicator. I always knew how it was going, how she needed support, and what ways could we improve. Hannah was equally impressive working with preschool students. There was no other coach that works equally well with the range of age groups like Hannah.

Perhaps the factor that really places Hannah my top three is her training abilities, and again, this relates to every age. Hannah developed our Kindergarten/Pre-K program, tested and improved the activities in the field, and was our best trainer. Her memory and consistency in teaching these games and her ability at the programs to help other coaches become their best is incredible. Hannah lived and breathed our goal of striving as individuals and as a company to become the best possible versions of ourselves. She helped write the activity sheets and create the organization of our coach's manual, she helped lead our staff training, and was able to train and mentor other coaches while also running the programs as one of the coaches. Hannah is the best trainer we ever had. We were so fortunate to have her work for us for all those years.

Hannah's gifts are many. She is incredibly organized and recognizes and models the values of consistency. Hannah is a master trainer and leader and supports and empowers others to be their best. Hannah excels at everything she puts her mind to and her school will become a model for others to follow.

Sincerely,

Chandon S. Thorell

CEO and Owner, After COOL Fitness; CEO and Owner, After COOL Outdoors

chandon@aftercoolfitness.com

602-692-5937

Exhibit 6 cont...



June 21, 2021

This serves as a letter of recommendation for Nina Amter.

I have known Nina since August of 1998 when she became an upper elementary Montessori teacher at Kenilworth Montessori in the Phoenix Elementary School District. In 1999 she earned her American Montessori Society (AMS) Teacher Certification and led an upper elementary Montessori classroom for 6 years. In 2002 she earned her MA in Elementary Education with a concentration on Montessori pedagogy.

Ms. Amter demonstrated extraordinary talent in both teaching and as a teacher leader. Her competence and ethics as an educator were exemplary. She had the reputation of a superb teacher, a public Montessori school pioneer and effective leader in our community where she has served as Lead Teacher for our elementary team. She took responsibility for planning and implementing Professional Learning Community (PLC) meetings and coaching new, incoming teachers. Her responsibilities included the creation and publishing of agenda's, leadership during meetings and follow-up communication to staff and administration.

Her work in the classroom with students was of superior quality. She knows the theory, curriculum, and developmental levels as well. She nurtured the spirit of each child in the environment and her students thrived as a result! Nina ingrained practices of equity, inclusion and social justice and restorative practices into the fabric of her classroom. She exhibited highly organized and has highly effective classroom management skills. On numerous occasions she served as a supervising teacher for student teacher internships from major universities as well as AMS.

Nina was a highly motivated, innovative self-starter who rarely needed supervision. She was efficient in planning projects, punctual with meeting deadlines and conscientiously adhered to district policy standards and guidelines.

Her expertise was an asset to the district and the larger education community. Nina has the ability to think outside of the box when solving problems or working on projects. She resisted the constraints of the ordinary, introducing creative options. Her style is collaborative and her opinions were highly respected by her peers and the school community. She has experience in non-profit consultation and is currently a small business owner in Phoenix.

I am deeply impressed by Nina Amter and recommend her unhesitatingly. I am confident that she will provide a high level of commitment as an educational consultant, non-profit expert with a strong business acumen. If you have any questions or wish to speak further about Ms. Amter, please feel free to call me at (602) 257-4069.

Sincerely,

A handwritten signature in cursive that reads "Susan Engdall". The signature is written in black ink and is positioned above the typed name.

Susan Engdall
Principal
Shaw Montessori - Phoenix Elementary School District #1

Exhibit 6 cont...



July 8, 2021

To whom it may concern:

It is a pleasure to present this letter of recommendation for Nina Moore in support of her Educational Consultant role in founding and launching The Rhiza Schoolhouse (TRS). I have known Nina for 30 years, professionally and personally. She brings a wealth of experience and knowledge to her education work, yet perhaps more importantly, compassion, grace, and integrity as she interacts with those around her.

Nina's educational and career background provides a mosaic of experience well-suited to the educational landscape. She has a long history of working with several Montessori schools and assisting with numerous roles at those schools as well having earned a Master's degree in Elementary Education with a concentration in Montessori pedagogy. She has cultivated a deep understanding of this approach and the ways in which the model can meet diverse student needs and learning preferences. Nina has served in a teaching capacity as well as in building school capacity and funding credibility. She has extensive business experience, grant writing expertise, an understanding of financial compliance, monitoring and evaluation. Her evaluation and tracking are especially strong and she knows how to design programming that results in clear and meaningful metrics. These skills will be critical to the success of The Rhiza Schoolhouse (TRS) and its ongoing sustainability.

Nina is also gifted at quickly assessing organizational strengths and weaknesses and is skilled at navigating interpersonal dynamics, particularly with educational colleagues and policy stakeholders. It is this gift that allows her to deeply engage with people from all walks of life, so they feel valued and heard. This talent, along with her financial and budgeting acumen offer a powerful combination of skills as well as being highly organized and a creative problem-solver.

On a final note, I would welcome the opportunity to discuss Nina's experience and qualifications further, if desired, and to answer any questions. Please contact me at 303 956 6220 if you would like additional information for your files.

Sincerely,

A handwritten signature in blue ink, appearing to read "S. Lena Cazeaux".

S. Lena Cazeaux
EdD Organizational Change and Leadership, expected 2021
University of Southern California
Barbara J. and Roger W. Rossier School of Education
cazeaux@usc.edu
303.956.6220

Exhibit 6 cont...

Stephanie Clark
730 W. Portland St.
Phoenix, AZ 85007

July 1, 2021

To Whom It May Concern:

I am writing this letter to confidently recommend Nina Amter Moore to serve as Educational Consultant for The Rhiza Schoolhouse (TRS). Nina is a brilliant, personable, and driven individual who has a breadth of expertise in teaching and education, nonprofit consulting, and business leadership.

I met Nina over 20 years ago. I first came to know Nina as the teacher of my three youngest children. Her passion for Montessori is evident through her teaching and educational pursuit of a Master's in Elementary Education with a concentration in Montessori Pedagogy. As my children's teacher, I witnessed how creative, patient, and dedicated Nina is as she worked to understand each child's learning style and meet their educational and social needs. Nina understands the importance of a safe and fun learning environment and always took into account the impact of a child's external environment on learning. Nina always taught to bring out the best in each of her students. Nina continues to serve as a mentor to my children and has become a close family friend.

In addition to her teaching background, Nina has significant experience working with nonprofits. She worked as a consultant for a non-profit organization for several years, through which she led a team to assist parents set up trust funds and plans to ensure their children with disabilities would have provisions when necessary. She has also served on the boards of the Lincoln Family YMCA heading the Youth Program Committee and the Denver Dance Company with fundraising and grant writing support.

Nina is also an expert in crafting and executing business plans. She is organized, detail-oriented and knows how to outline the steps necessary to accomplish her goals. One of her largest business endeavors includes co-founding and leading the business components of The Oxide Studio in Phoenix. The Oxide Studio has grown exponentially because of her beautiful diligence

I have the utmost confidence that Nina's extensive experience, ingenuity, adaptability, and work ethic make Nina more than capable to fulfill her role as Educational Consultant. Please do not hesitate to contact me at (602) 321-9775 with any questions.

Sincerely,

Stephanie Clark

Exhibit 7

EXHIBIT VII: Pre-Operational Budget Charter School: The Rhiza Schoolhouse

A charter school is likely to incur considerable costs before it receives its first state school fund distribution. Prepare a budget that includes revenues and expenses related to early planning and implementation you expect to incur and which are not likely to be covered by the school's first year's operating budget.

Revenue Sources		Budget Amount	Source
Federal Funding			
	Start-up Grant		
	Other (Specify)		
State Funding			
	Other (Specify)		
Local Funding			
	Contributions		
	Fundraising	100,000	GoFundMe Campaign
	Foundations, Grants	215,000	New Schools Venture Fund
Other Sources			
	Line(s) of Credit		
	Loan(s)	100,000	Charter Asset Management
	Other (Specify)		
TOTAL REVENUE:		415,000	
Expenditures		Budget Amount	Assumption (e.g. 10 hours consulting @ \$50/hour)
Legal Fees		500	2 hours @ \$250/hour
Accounting and Consulting Fees		500	\$300/year, \$25/month for accounting system; 4 hours @ \$50/hour for consultation
Fundraising Fees		2900	2.9% transaction fees for GoFundMe Campaign
Marketing (e.g. Postage, Printing)		500	\$1.17/sheet for flyers/brochures, 100 stamps @ \$50
Recruitment of Students		250	\$25-50 to participate at local festivals, farmers markets
Recruitment of Staff		250	\$80-140 to post on professional/non-profit sites
Curriculum Development		0	The curriculum is developed and owned by the founders
Staff/Board Development		250	\$1.17/sheet for printing board agreements, \$15 for printing handbooks
Staff Stipends		1500	\$500 stipend per teacher for classroom set-up
Equipment and Supplies		45000	Cost of Montessori classroom materials and furnishings
Information Technology		5000	\$300/year, \$25/month for accounting system; \$282/year for website; \$50/hour for web development @ 15-20 hours; Montessori School Management System @ \$3500
Rent		39000	Rent for 3 months at \$160,000/year
Utilities		2500	\$2,500 Deposits and first three months of service(s)
Telephone/Fax		1500	Deposit and equipment purchase for the main phone line.
Travel		1000	Travel for staff interview to and/or from
Other (Specify)		6000	CCSS Alignment (Oregon) to Montessori Curriculum K-6
TOTAL EXPENDITURES		106650	

**EXHIBIT VII Operating Budget: Projected Revenues and Expenditures
Charter School: The Rhiza Schoolhouse**

Use Whole Dollar Amounts (No Cent s)	Fiscal Year 20 23	Fiscal Year 20 24	Fiscal Year 20 25	Fiscal Year 20 26	Fiscal Year 20 27	Fiscal Year 20 28
Major Assumptions:						
Student Enrollment	80	80	110	134	158	
Facility Size (In Square Feet)	8500	8500	8500	12000	12000	
Average Teacher Salary	40000	42000	44100	46305	48620	
Student/Teacher Ratio	13-1	13-1	14-1	11-1	12-1	
REVENUE PROJECTIONS						
From State Sources						
State School Fund	644400	644400	886050	1079370	1272690	
State Entitlements						
State Grants	50000	50000	60000	60000	75000	
From Federal Sources						
Federal Entitlements						
Federal Direct Grants	25000	25000	25000	50000	50000	
Federal Revenue Pass Through						
Federal Through Another Agency (Specify)						
School Lunch						
From Local Sources						
Private Grant(s)	25000	25000	30000	50000	80000	
Fundraising	5000	6000	7000	8000	10000	
Investment Income				5500	6000	
Program Fees			112500	112500	125000	
Facilities Rent						
From Other Sources						
Specify						
TOTAL PROJECTED REVENUE	749400	750400	1120550	1365370	1618690	
EXPENDITURE PROJECTIONS						
School Administration						
Salaries/Wages-School Director	50000	55000	60500	66550	73205	
Salaries/Wages-Supervisors						
Salaries/Wages-Clerical Staff	28000	29400	30870	32414	34034	
Fringe Benefits-Health Insurance			6900	7000	7100	
Fringe Benefits-Retirement (PERS)	44850	47093	82412	114489	131396	
Fringe Benefits-FICA	25350	26618	46581	64711	74267	
Fringe Benefits-Employee Life						
Fringe Benefits-Workers Comp.	78	85	92	99	107	
Office Supplies	500	1000	1500	1700	2000	
Equipment and Furniture	1500	3000	4000	5000	6000	
Information Technology	2000	2000	2700	3200	3800	
Purchased Management Services						
<i>Subtotal - School Administration</i>	<i>152278</i>	<i>164196</i>	<i>235555</i>	<i>295163</i>	<i>331909</i>	
Instructional Staff						
Salaries/Wages-Full-Time Teachers	120000	126000	220500	324135	388960	
Salaries/Wages-Part-Time Teachers	75000	78750	137813	173644	182328	
Salaries/Wages-Substitutes	5000	6000	7000	8000	9000	
Fringe Benefits-Health Insurance			27500	28000	28500	
Fringe Benefits-Retirement (PERS)	44850	47093	82412	114489	131396	
Fringe Benefits-FICA	25350	26618	46581	64711	74267	
Fringe Benefits-Employee Life						
Fringe Benefits-Workers Comp.	195	211	228	247	268	
<i>Subtotal - Instructional Staff</i>	<i>270395</i>	<i>284672</i>	<i>522034</i>	<i>713226</i>	<i>814719</i>	

EXHIBIT VII Operating Budget: Projected Revenues and Expenditures
Charter School: The Rhiza Schoolhouse

Use Whole Dollar Amounts (No Cents)		Fiscal Year				
		20 23	20 24	20 25	20 26	2027
Instructional		20 24	20 25	20 26	20 27	2028
	Contract Labor-Instructional	11000	11000	12750	14500	18000
	Consultants					
	Purchased Management Services	1920	1920	2640	3216	3792
	Professional Development	1000	1500	2000	2500	3000
	Special Education	5400	5400	7200	9000	10800
	Student Assessments/Testing	5200	5200	7150	8970	10270
	Supplies/Materials	1000	1500	2000	2500	3000
	Classroom Furniture			1000	2000	3000
	Equipment					
	Textbooks					
	Information Technology	800	800	1100	1400	1600
	Computer Supplies, Repairs	500	1000	1500	2000	2500
	Library			1000	1500	2000
Subtotal - Instructional		26280	28020	37940	47086	57462
Business Services						
	Accounting	1000	1200	1400	1600	2000
	Advertising	500	500	500	500	500
	Public Relations/Marketing	500	500	500	500	500
	Insurance-General Liability	2100	2100	2300	2500	2800
	Insurance-Vehicle					
	Insurance-School Leaders Errors/Omissions	800	800	800	800	800
	Insurance-Other (Specify)					
	Office Expenses	200	200	300	400	500
Fees, Dues, Licenses, Memberships						
	Purchased Management Services					
	Payroll Services					
	Postage, Shipping	250	250	250	250	250
	Printing	250	250	250	250	250
	Telephone	1500	1500	1500	1600	1700
	Travel	1000	2000	2500	3000	3500
	Other (Specify)					
Subtotal - Business Services		8100	9300	10300	11400	12800
Operations/Maintenance						
	Contract Labor-Non-Instructional					
	Custodial Services	8000	8000	8500	8500	9000
	Maintenance-Vehicle					

EXHIBIT 7 - pg 4

	Maintenance-Facility					
	Maintenance-Office Equipment					
	Maintenance Supplies/Materials					
	Other (specify)					
Subtotal - Operations/Maintenance		8000	8000	8500	8500	9000
Physical Plant						
	Rent	160000	160000	160000	160000	160000
	Mortgage					
	Renovation/Construction					
	Capital Debt Service					
	Sewer/Water/Garbage/Utilities	2500	2500	2575	2652	2732
	Other (specify)					
Subtotal - Physical Plant		162500	162500	162575	162652	162732

EXHIBIT VII Operating Budget: Projected Revenues and Expenditures Charter School: The Rhiza Schoolhouse

Use Whole Dollar Amounts (No Cents)		Fiscal Year				
		2023	20 24	20 25	20 26	20 27
Student Services		20 24	20 25	20 26	20 27	20 28
	Health	5000	7500	10000	15000	20000
	Transportation					
	Food					
	Recreation	1000	1000	2000	3000	5000
	Other (Specify)					
Subtotal - Student Services		6000	8500	12000	18000	25000
Board of Trustees						
	Audit	750	750	750	750	750
	Advertising	250	250	250	250	250
	Dues and Subscriptions	100	100	100	100	100
	Workshops and Conferences	500	500	500	500	500
	Fundraising	1000	1000	1500	2000	2500
	Legal	500	500	750	1000	1000
	Other (Specify)					
Subtotal - Board of Trustees		3100	3100	3850	4600	5100
Contingency Fund						
	Contingency-5%	37470	37470	56028	68269	80935
Subtotal - Contingency Fund		37470	37470	56028	68269	80935
These Amounts Should Be the Subtotal Calculated Above		Fiscal Year				

Exhibit 7 - p95

	20 23	20 24	20 25	20 26	20 27
	20 24	20 25	20 26	20 27	20 28
Sub-Tot als of Projected Expenditures					
Subtotal - School Administration	152688	164623	236359	296308	333230
Subtotal - Instructional Staff	270688	284973	522702	714223	815879
Subtotal - Instructional	26820	28020	37940	47086	57462
Subtotal - Business Services	8100	9300	10300	11400	12800
Subtotal - Operations/Maintenance	8000	8000	8500	8500	9000
Subtotal - Physical Plant	162500	162500	162575	162652	162732
Subtotal - Student Services	6000	8500	12000	18000	25000
Subtotal - Board of Trustees	3100	3100	3850	4600	5100
Subtotal - Contingency Fund	37470	37470	56028	68269	80935
TOTAL PROJECTED EXPENDITURES	675366	706486	1050254	1331038	1502138
These Amounts Should Be the Total Revenue and Expenditures Calculated Above					
	Fiscal Year				
	20 23	20 24	20 25	20 26	20 27
	20 24	20 25	20 26	20 27	20 28
TOTAL PROJECTED REVENUE	749400	750400	1120550	1365370	1618690
TOTAL PROJECTED EXPENDITURES	675366	706486	1050254	1331038	1502138
NET PROJECTED INCOME (LOSS)	74034	43914	70296	34332	116552

EXHIBIT VII Operating Budget: Projected Revenue Detail Charter School: The Rhiza Schoolhouse

Use Whole Dollar Amounts (No Cents)	Fiscal Year	Fiscal Year	Fiscal Year	Fiscal Year	Fiscal Year
	20 23	20 24	20 25	20 26	20 27
Revenue Sources	20 24	20 25	20 26	20 27	20 28
Local	30000	31000	37000	63500	96000
State	694400	694400	946050	1139370	1347690
Federal	25000	25000	25000	50000	50000
Other (Specify)Program Fees-Training Center			112500	112500	125000
TOTAL PROJECTED REVENUES	749400	750400	1120550	1365370	1618690

Are any major changes in the revenue sources expected during the five-year projection? If yes, explain in detail with calculations. Attach additional sheets if necessary.

Between Year 1 and Year 2 The Rhiza Schoolhouse will open enrollment to 3 and 4 years olds.

- As the source of funds and amounts are unknown at this time, calculations would be inaccurate. However, the plan includes being eligible for Federal Funds from the American Families Plan which includes Universal preschool for 3 and 4 year olds.
- In addition, applying for the State of Oregon's Student Success Act-Student Investment Account to fund the preschool age students.

Between Year 3 and Year 4 The Rhiza Schoolhouse will offer a Montessori Teacher Training Program.

- Tuition, according to the National American Montessori Center (NAMC), tuition per student is \$7500. At 15enrollees per year for the first 2-3 years, the program would total \$112500 in additional revenue per year.

- According to the North American Montessori Teachers Association, there is a shortage of trained Montessori educators.

What contingency plans have been made if revenues are not received or are lower than budgeted? Attach additional sheets if necessary.

TRS will proactively address low enrollment or a large decline in enrollment and will partner with Schola.com, data-driven recruitment campaigns that will increase our visibility at no charge once TRS claims our school. They will assist with: Growing our prospective student pipeline, Communicating with interested students, Boosting student enrollment, Raising our lead-to-enrollment conversion rate, Increasing our school's visibility, Establish a marketing budget & plan, Improve our digital marketing Return on Investment, Automate our recruitment efforts and Provide seamless online enrollment.

Exhibit 7 - pg 6

The contingency fund, at 5% of projected revenue, will provide a financial cushion if expenditures are higher than projected. Contingency Funds and Accumulated funds will be invested and utilized as needed to offset costs that are unknown and/or underestimate and for under-enrollment.

As a last resource, Charter Asset Management offers Term Loans and Lines of Credit. If The Rhiza Schoolhouse is unable to bridge the gap through contingency and accumulated funds, grant awards and other fundraising campaigns, the board and administration will consider a loan to cover shortages in the budget.

Use Whole Dollar Amounts (No Cents)	2023	2024	2025	2026	2027
Expenditure Function	20 24	20 25	20 26	20 27	20 28
School Administration	152688	164623	236359	296308	333230
Instructional Staff	265395	284672	522304	713226	814719
Instructional Support	26820	28020	37940	47086	57462
Business Support Services	8100	9300	10300	11400	12800
Operations and Maintenance	8000	8000	8500	8500	9000
Physical Plant	162500	162500	162575	162652	162732
Student Services	6000	8500	12000	18000	25000
Board of Trustees	3100	3100	3850	4600	5100
Contingency	37470	37470	56028	68269	80935
TOTAL	670073	706185	1049856	1330041	1500978

Explain specific financial goals and objectives for the projected five years (e.g. capital improvements, curriculum purchases, increased staffing). Attach additional sheets if necessary.

Capital improvements are unknown at this juncture, the goal of The Rhiza Schoolhouse is to purchase property in the future, but foresee that in 8 to 10 years.

The Montessori curriculum is supplied through the teacher's albums from their training, the 'Master' curriculum is available for a minimum fee. The Rhiza Schoolhouse already owns the curriculum for ages 3-12 years.

Between Year 3 and Year 4 the goal is to expand to grades 7 and 8, a Middle School Program, the purchase of this is similar to ages 3-12, as the teachers have their albums from their training and the 'Master' curriculum is available for a minimum fee.

As classrooms are added, a Lead and an Assistant Teacher will also be added: Year 1 = 3 Lead & 3 Assistants

Year 2 = 3 Lead & 3 Assistants

Year 3 = 5 Lead & 5 Assistants

Year 4 = 7 Lead & 6 Assistants

Year 5 = 8 Lead & 6 Assistants

Use Whole Dollar Amounts (No Cents)	Fiscal Year				
Per Pupil Revenues and Expenditures	20 23	20 24	20 25	20 26	20 27
Per Pupil Revenue (All Sources)	9368	9380	10187	10189	10245
Per Pupil Expenditures					
Instructional	3653	3909	5093	5674	5520
Business and Administration	2010	2174	2242	2296	2190
Operations, Maintenance, Physical Plant	2131	2131	1555	1277	1087
Student Services	75	106	109	134	158
Board of Trustees	39	39	35	34	32

Explain how the projected per-pupil expenditures are aligned with the school's mission statement. Add additional sheets if necessary.

The mission of The Rhiza Schoolhouse and its Board is to ensure full and equitable use of its facilities, systems and funding by providing financial management support services aligned to the Board Policies and By Laws and the laws governing district sponsored charter schools. It is the goal of The Rhiza Schoolhouse to sustain public trust and confidence in the charter school through exercising sound financial practices and effective stewardship of funds.

Exhibit 8

EXHIBIT VIII FINANCIAL PLAN

Provide the financial plan for the public charter school. Include the following components:

- a. Describe the financial management systems for the public charter school.

TRS will obtain Quickbooks for Nonprofits as the financial management system (FMS) that will define account classifications/a chart of accounts that provide meaningful financial management information to its user. In accordance with the Program Budgeting and Accounting Manual-2019 Edition the FMS will conform with Generally Accepted Accounting Principles (GAAP) and the accounting standards of Governmental Accounting, Auditing and Financial Reporting (GAAFR). Financial information that is consistently presented in a simple and straightforward format will be readily understood by the public, and provide a sound basis for decision-making.

- b. Describe how the financial management systems will meet the requirements of ORS 338.095(1).

Quickbooks for Nonprofits is a financial management system which includes a budget and accounting system that:

- Is compatible with the budget and accounting system of Portland Public Schools; and
- Complies with the requirements of the uniform budget and accounting system adopted by rule of the State Board of Education under ORS 327.511 (Uniform budget and accounting system).

- c. Include a plan for having the financial management systems in place at the time the school begins operating. Include the role/title of the individual(s) that will be responsible for the implementation and operation of the financial management system.

TRS, the Executive Director, the Board Treasurer along with the Finance Committee will oversee implementation of the Quickbooks for Nonprofits system as well as advise on the appropriate hire of a seasoned charter school/nonprofit accountant who will monitor the accounts on a monthly basis. The Executive Director, Hannah Morris will be the key user of the financial management system. In addition, the Office Manager will monitor daily and report to the Executive Director. The accounting system will satisfy the administrator's obligation to ensure compliance with the legal, regulatory and fiduciary responsibilities of this position of public trust.

- d. Provide evidence that the systems and procedures in the proposed financial and business plan follow general accounting procedures.

TRS will maintain an accounting and financial reporting system that conforms to both Generally Accepted Accounting Principles (GAAP) adopted by the Government Accounting and Standards Board (GASB) and Oregon local budget law, and will issue a Comprehensive Annual Financial Report (CAFR).

- e. Provide evidence that the proposed budget and financial plan for the public charter school are financially sound.

The proposed budget for the TRS, Exhibit VII, includes a minimum of \$200,000 funds to establish the school with two avenues to obtain the funds. The NewSchools Venture Fund offers grants at an average of \$215,000 for Innovative Public Schools, Learning Solutions, Diverse

Exhibit 8 - Pg 2

Leaders and Racial Equity-*We're looking for the people with the ideas that are going to change education and open doors for all children. The call has never been more urgent to innovate — to bring new organizations that will give every child a great chance in life. Each and every child has a fundamental right to a real education — one that leaves her ready to create a fulfilling life, make positive change, and help build an equitable future for everyone. Yet, too many children — especially in Black, Latino and low-income neighborhoods — don't have access to the learning opportunities they need. If you have a plan to change that, we want to support you.* The plan for a GoFundMe campaign to raise ~\$100,000 would augment the NewSchools grant. If the grant is less than expected or we are denied and/or the fundraising campaign is less than anticipated, a loan from Charter Asset Management will be obtained.

Fundraising always kick-starts by appealing to your own 'backyard', calling on friends, family and colleagues to contribute to your worthy cause. TRS has a far-reaching support base that has embraced the establishment of a school Rooted in Peace Education anchored in Montessori pedagogy and have pledged their monetary support .

Fundraising through our donor base, obtained from the initial campaign, will continue to increase throughout each year, as the campaign will adjust for the current financial needs. TRS will continue to monitor Charter Management Organization & Developer Grants-Charter School Programs (CSP) from the Office of Elementary & Secondary Education (OESE) of the U.S. Department of Education and apply for all it is eligible.

In addition, in year one, TRS will apply for The Student Success Act-Student Investment Account and/or Universal Preschool funds, once they become available, to fund the preschool age students in the Primary Level Classroom. The plan is to add three and four-year old students in the second fiscal year to complete the Primary level of the Montessori pedagogy. This classroom will have ~10-three, four and five-year old students in attendance.

The first Primary classroom will feed into the Lower Elementary classroom (6-9 years) which will feed students to the next level, Upper Elementary (9-12 years).

At the end of the second fiscal year, two classrooms will be added, a second Primary level and a second Lower Elementary classroom, raising enrollment to 134 students, not including the three and four-year old students. There will be two Primary classrooms serving 30 students each and two Lower Elementary classrooms serving 30 students each and one Upper Elementary classroom serving 30 students.

Between year three and four, two additional programs will be added:

- A Montessori Teacher Training Program
- A Middle School Program for grades seven and eight.

According to the North American Montessori Teachers Association, the demand for trained Montessori teachers far outweighs the supply. The Montessori Teacher Training Program will charge an average of \$7500.00 per person with an expected enrollment of 15 persons per year.

Adding the Middle School Program will complete the plan of a fluid Montessori School serving from the Primary age of three to preparing the graduates for High School and beyond.

TRS will be supported by a professional Grant Writing Firm with 25+ years of experience and a 70% award rate of success, pro bono, for its first five years of operation. Please see Appendix B as a sample of the current grant opportunities currently available. TRS will apply to all it is

Exhibit 8 - pg 3

eligible for to augment current programs, extra-curricular programming and grow the mission of the school. This list of grant availability will be updated regularly and dynamically administered.

Our monthly calendar and newsletter will engage the parent body, local business owners and community members offering sponsorship programs to promote enrolled family owned businesses as well as the neighboring business. TRS will solicit in-kind donations, employee matching programs and volunteer support from Oregon based corporations and sports teams who provide these charitable services.

The proposed five-year operating budget is based on extensive research to utilize up to date and as close to accurate numbers, percentages and formulas to determine expected revenue and expenditures.

As per ORS 3358.155, April 2022, Distributions of State School Fund amounts, Per-student Revenue is budgeted at 90% of \$8,950 ADMw or \$8,055 per student. Fundraising through our donor base will continue to increase throughout each year, as the campaign will adjust for the current financial needs. Grants from the Federal Government, the State of Oregon, corporations and foundations will be supported by a professional Grant Writing Firm with 25+ years of experience and a 70% award rate of success, pro bono, for its first five years of operation. The contingency fund, at 10% of projected revenue, will provide a financial cushion if expenditures are higher than projected.

The school director's starting salary of \$50,000 per year with a 10% Cost of Living Adjustment (COLA). Clerical staff starting salary is \$28,000 per year with a 5% COLA per year. Montessori trained teachers are based on an average of \$40,000 per year, (COLA) of 5% each additional year. Full-day Instructional Assistant support is budgeted at \$25,000 per year with a 5% COLA per year.

Benefits are calculated on the total of the teacher, assistant and clerical salaries at 23% for PERS. Payroll Taxes are based on the total of the teacher, assistant and clerical salaries at 13% to cover FICA and Unemployment Insurance and Worker's Compensation is calculated using NCCI Code #8868 at \$0.10 per \$100 of annual salaries.

Contracts for self-employed Specialist and Enrichment Teachers are for 3 hours per week for 47 weeks per year at \$25 per hour. Additional instructional expenditures for consumable materials and textbooks are minimal in a Montessori classroom.

Business Services expenditures will also be as minimal as possible. TRS will operate as an environmentally conscious and sustainable organization. Outside services will be obtained as needed, relying on the Board and our growing network to provide expertise and services at a reduced rate.

Physical rent will be a large expenditure and has been calculated at \$20 per square foot for an 8500 square foot facility for the first three years. For year four and beyond, an adjustment will be made for this budget item as TRS adds a Middle School classroom.

Contingency Funds and Accumulated funds will be invested and utilized as needed to offset costs that are unknown and/or underestimated and for under-enrollment, to purchase additional Montessori materials, instructional supplies, furniture and computers for additional classrooms.

Exhibit 9

EXHIBIT IX BOARD of DIRECTORS for the PROPOSED CHARTER SCHOOL

NAME of PROPOSED CHARTER SCHOOL: The Rhiza Schoolhouse

This exhibit is to provide information about the board of directors of the proposed charter school. List directors alphabetically by last name. Describe each director's qualifications. Give each director's term of service. Add rows if necessary.

Directors		Each director's qualifications to oversee educational programs, budgeting, finance, accountability, improvement planning, marketing, community outreach, and/or other areas important to the operation of a public charter school.	Term	
Last Name	First Name		Start Year	End Year
Thorell	Chandon	Montessori Trained Middle School Teacher	2023	2025
Van Buren	S. Janae	Montessori Educated, Primary Care Physician	2023	2025
Loynd	Taylor	Montessori Educated, Lawyer	2023	2025
Brandt	Elizabeth	HR Manager	2023	2025
Henderson	Thea	Public School Educator	2023	2025

We are leaving positions of the board open to add additional members of the community as the development continues.

Exhibit 10 - 1

NAME of PROPOSED CHARTER SCHOOL: The Rhiza Schoolhouse

Oregon Revised Statute 338.045(3)(b) requires that “each member of a proposed public charter school governing body must provide an acknowledgment of understanding related to the standards of conduct and the liabilities of a director of a nonprofit organization, as those standards and liabilities are described in ORS chapter 65, if the public charter school is organized as required by ORS 338.035(2)(a)(B) and (C).”

Please initial each item to indicate you have reviewed related documents and understand the responsibilities you hold related to that item.

^{DS}
 ^{EB} I acknowledge that I have reviewed the standards of conduct and the liabilities of a director of a nonprofit organization as those standards and liabilities are described in **Oregon Revised Statute (ORS) chapter 65** [click here](#).

^{DS}
 ^{EB} I acknowledge that it is my responsibility to understand the standards of conduct and the liabilities of a director of a nonprofit organization as they relate to **holding a position on a public charter school governing board of directors** [click here](#). (Charter School law ORS 338)

^{DS}
 ^{EB} I acknowledge that I have reviewed a copy of **the articles of incorporation, bylaws and any policies or procedures** adopted by the nonprofit organization and will review all proposed governing documents in good faith prior to taking action.

^{DS}
 ^{EB} I acknowledge that I am a public official bound to ethics laws in Oregon and I have reviewed the **Guide for Public Officials** published by the Oregon Government Ethics Commission [click here](#).

^{DS}
 ^{EB} I acknowledge that I am responsible for the comprehensive public education of students, public funds, the operation and oversight of a public school, and **conducting myself as a steward of such public assets**.

^{DS}
 ^{EB} I acknowledge that I am one member of the governing board and **do not speak for or represent the board as a whole**.

^{DS}
 ^{EB} I acknowledge that my actions and words as they relate to the governance and operation of the nonprofit organizations and public charter school are bound by **public meeting and public records laws** [click here](#) and I will make everything available to the public as requested and allowed by law.

^{DS}
 ^{EB} I acknowledge that I have reviewed the **Attorney General’s Public Records and Meetings Manuals** [click here](#) published by the Oregon Department of Justice.

^{DS}
 ^{EB} I acknowledge that it is my responsibility to **seek clarity and training as needed** to comply with nonprofit laws, ethics laws, charter school laws, and public school governance.

^{DS}
 ^{EB} I acknowledge that it is my responsibility to **understand any changes to the law** which affect the standards of conduct, liabilities, or other responsibilities of a director of a nonprofit organization governing a public charter school in Oregon.

Elizabeth Brandt

Print Name

TBD - Board Member

Position/Title on Nonprofit Board

DocuSigned by:

Elizabeth Brandt

688A86479E8E460

Signature

07/01/2022

Date

Exhibit 10 - 2

NAME of PROPOSED CHARTER SCHOOL: The Rhiza Schoolhouse

Oregon Revised Statute 338.045(3)(b) requires that “each member of a proposed public charter school governing body must provide an acknowledgment of understanding related to the standards of conduct and the liabilities of a director of a nonprofit organization, as those standards and liabilities are described in ORS chapter 65, if the public charter school is organized as required by ORS 338.035(2)(a)(B) and (C).”

Please initial each item to indicate you have reviewed related documents and understand the responsibilities you hold related to that item.

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I acknowledge that I have reviewed a copy of **the articles of incorporation, bylaws and any policies or procedures** adopted by the nonprofit organization and will review all proposed governing documents in good faith prior to taking action.

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I acknowledge that I have reviewed the **Attorney General’s Public Records and Meetings Manuals** [click here](#) published by the Oregon Department of Justice.

I acknowledge that it is my responsibility to **seek clarity and training as needed** to comply with nonprofit laws, ethics laws, charter school laws, and public school governance.

I acknowledge that it is my responsibility to **understand any changes to the law** which affect the standards of conduct, liabilities, or other responsibilities of a director of a nonprofit organization governing a public charter school in Oregon.

S. Janae Van Buren

DocuSigned by:
S. Janae Van Buren
688A86479E8F460

07/11/2022

Print Name

Signature

Date

TBD - Board Member

Position/Title on Nonprofit Board

Exhibit 10-3

NAME of PROPOSED CHARTER SCHOOL: The Rhiza Schoolhouse

Oregon Revised Statute 338.045(3)(b) requires that “each member of a proposed public charter school governing body must provide an acknowledgment of understanding related to the standards of conduct and the liabilities of a director of a nonprofit organization, as those standards and liabilities are described in ORS chapter 65, if the public charter school is organized as required by ORS 338.035(2)(a)(B) and (C).”

Please **initial each item** to indicate you have reviewed related documents and understand the responsibilities you hold related to that item.

I acknowledge that I have reviewed the standards of conduct and the liabilities of a director of a nonprofit organization as those standards and liabilities are described in **Oregon Revised Statute (ORS) chapter 65** [click here](#).

I acknowledge that it is my responsibility to understand the standards of conduct and the liabilities of a director of a nonprofit organization as they relate to **holding a position on a public charter school governing board of directors** [click here](#). (Charter School law ORS 338)

I acknowledge that I have reviewed a copy of **the articles of incorporation, bylaws and any policies or procedures** adopted by the nonprofit organization and will review all proposed governing documents in good faith prior to taking action.

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I acknowledge that I have reviewed the **Attorney General’s Public Records and Meetings Manuals** [click here](#) published by the Oregon Department of Justice.

I acknowledge that it is my responsibility to **seek clarity and training as needed** to comply with nonprofit laws, ethics laws, charter school laws, and public school governance.

I acknowledge that it is my responsibility to **understand any changes to the law** which affect the standards of conduct, liabilities, or other responsibilities of a director of a nonprofit organization governing a public charter school in Oregon.

Thea Klever

Print Name
TBD - Board Member

DocuSigned by:
Thea Klever

688A86479E8E460
Signature

07/05/2022

Date

Position/Title on Nonprofit Board

Exhibit 10-4

NAME of PROPOSED CHARTER SCHOOL: The Rhiza Schoolhouse

Oregon Revised Statute 338.045(3)(b) requires that "each member of a proposed public charter school governing body must provide an acknowledgment of understanding related to the standards of conduct and the liabilities of a director of a nonprofit organization, as those standards and liabilities are described in ORS chapter 65, if the public charter school is organized as required by ORS 338.035(2)(a)(B) and (C)."

Please initial each item to indicate you have reviewed related documents and understand the responsibilities you hold related to that item.

I acknowledge that I have reviewed the standards of conduct and the liabilities of a director of a nonprofit organization as those standards and liabilities are described in **Oregon Revised Statute (ORS) chapter 65** [click here](#).

I acknowledge that it is my responsibility to understand the standards of conduct and the liabilities of a director of a nonprofit organization as they relate to **holding a position on a public charter school governing board of directors** [click here](#). (Charter School law ORS 338)

I acknowledge that I have reviewed a copy of **the articles of incorporation, bylaws and any policies or procedures** adopted by the nonprofit organization and will review all proposed governing documents in good faith prior to taking action.

I acknowledge that I am a public official bound to ethics laws in Oregon and I have reviewed the **Guide for Public Officials** published by the Oregon Government Ethics Commission [click here](#).

I acknowledge that I am responsible for the comprehensive public education of students, public funds, the operation and oversight of a public school, and **conducting myself as a steward of such public assets**.

I acknowledge that I am one member of the governing board and **do not speak for or represent the board as a whole**.

I acknowledge that my actions and words as they relate to the governance and operation of the nonprofit organizations and public charter school are bound by **public meeting and public records laws** [click here](#) and I will make everything available to the public as requested and allowed by law.

I acknowledge that I have reviewed the **Attorney General's Public Records and Meetings Manuals** [click here](#) published by the Oregon Department of Justice.

I acknowledge that it is my responsibility to **seek clarity and training as needed** to comply with nonprofit laws, ethics laws, charter school laws, and public school governance.

I acknowledge that it is my responsibility to **understand any changes to the law** which affect the standards of conduct, liabilities, or other responsibilities of a director of a nonprofit organization governing a public charter school in Oregon.

Chandon Thorrell

DocuSigned by:
Chandon Thorrell
688A86479E8E460

06/30/2022

Print Name

Signature

Date

TBD - Board Member

Position/Title on Nonprofit Board

Exhibit 10 - 5

NAME of PROPOSED CHARTER SCHOOL: The Rhiza Schoolhouse

Oregon Revised Statute 338.045(3)(b) requires that “each member of a proposed public charter school governing body must provide an acknowledgment of understanding related to the standards of conduct and the liabilities of a director of a nonprofit organization, as those standards and liabilities are described in ORS chapter 65, if the public charter school is organized as required by ORS 338.035(2)(a)(B) and (C).”

Please initial each item to indicate you have reviewed related documents and understand the responsibilities you hold related to that item.

I acknowledge that I have reviewed the standards of conduct and the liabilities of a director of a nonprofit organization as those standards and liabilities are described in **Oregon Revised Statute (ORS) chapter 65** [click here](#).

I acknowledge that it is my responsibility to understand the standards of conduct and the liabilities of a director of a nonprofit organization as they relate to **holding a position on a public charter school governing board of directors** [click here](#). (Charter School law ORS 338)

I acknowledge that I have reviewed a copy of **the articles of incorporation, bylaws and any policies or procedures** adopted by the nonprofit organization and will review all proposed governing documents in good faith prior to taking action.

I acknowledge that I am a public official bound to ethics laws in Oregon and I have reviewed the **Guide for Public Officials** published by the Oregon Government Ethics Commission [click here](#).

I acknowledge that I am responsible for the comprehensive public education of students, public funds, the operation and oversight of a public school, and **conducting myself as a steward of such public assets**.

I acknowledge that I am one member of the governing board and **do not speak for or represent the board as a whole**.

I acknowledge that my actions and words as they relate to the governance and operation of the nonprofit organizations and public charter school are bound by **public meeting and public records laws** [click here](#) and I will make everything available to the public as requested and allowed by law.

I acknowledge that I have reviewed the **Attorney General’s Public Records and Meetings Manuals** [click here](#) published by the Oregon Department of Justice.

I acknowledge that it is my responsibility to **seek clarity and training as needed** to comply with nonprofit laws, ethics laws, charter school laws, and public school governance.

I acknowledge that it is my responsibility to **understand any changes to the law** which affect the standards of conduct, liabilities, or other responsibilities of a director of a nonprofit organization governing a public charter school in Oregon.

Taylor Loynd

Print Name

TBD - Board Member

Position/Title on Nonprofit Board

DocuSigned by:
Taylor Loynd
688A86479E8F460

Signature

06/25/2022

Date

Exhibit 11

EXHIBIT XI BYLAWS for the PROPOSED CHARTER SCHOOL

Attach the bylaws.

The Rhiza Schoolhouse (TRS) Bylaws

ARTICLE I. PURPOSE

Section 1. Purpose. The purposes of The Rhiza Schoolhouse (TRS) Public Charter School are exclusively those allowed for organizations defined under Section 501(c)(3) of the Internal Revenue Code. Within these limits, the purposes of The Rhiza Schoolhouse (TRS) Public Charter School include: To establish and operate a school which provides a challenging academic program based on the educational philosophy and pedagogy of Dr. Maria Montessori. The Montessori approach balances two interdependent elements: the students' freedom to explore and think for themselves and their responsibility to work and learn within a community. Students will become self-directed scholars, flexible learners, creative problem solvers, resilient individuals, empathetic and global minded citizens, lifelong learners and be fully prepared to succeed in future schools, careers, and civic life.

Section 2. No Discrimination. The Rhiza Schoolhouse (TRS) Public Charter School shall not discriminate against any person on the basis of disability, race, color, gender, national origin, ethnicity, sexual orientation, age, religion, marital status, socioeconomic status, cultural background, familial status, physical characteristics, or linguistic characteristics of a national origin group.

ARTICLE II. NONVOTING MEMBERS

Section 1. Nonvoting Members. The Rhiza Schoolhouse (TRS) Public Charter School shall have voting members but may have nonvoting members.

Section 2. Rights and Obligations of Nonvoting Members. The nonvoting members shall have no power to vote on the election of directors or members, or to participate in a binding vote on any corporate matters. The Board of Directors may by resolution establish categories of nonvoting membership and determine the dues, duties and privileges of members in those categories. The Board of Directors may by resolution establish, alter or waive dues for nonvoting members. The Board may, by resolution, establish or alter the organization's policies regarding the selection, tenure, resignation, removal and any other matters concerning the nonvoting members.

ARTICLE III. BOARD OF DIRECTORS

Section 1. Duties of the Board. The Board of Directors shall establish the policies and oversee the programs and activities of the corporation, and ensure the proper management of its financial affairs and property. The role of the Board does not include direct management or conduct of the daily operations of the organization, and this responsibility shall instead be delegated to persons acting as staff; whether paid or unpaid.

Section 2. Qualifications of Direction. Nominees for positions on the Board of Directors must have exhibited an interest in and commitment to the purposes of The Rhiza Schoolhouse (TRS) Public Charter School.

Section 3. Number of Directors. The Board of Directors shall consist of no fewer than five and no more than ten members. The specific number of directors within this range shall be set and may be changed by resolutions passed by a majority of the directors in office. The Board may in this way increase the size of the Board and then may elect new directors to fill the newly created director positions.

Section 4. Terms of Directors. Board member positions will be three-year terms to provide for continuity with elections held annually. However, when they formally resign or are removed from office, directors shall remain in office until their successors are properly elected, designated, or appointed. There is no limit to the number of terms, successive or otherwise, a director may serve.

Section 5. Selection of Directors. The Board of Directors shall elect new Board members at an annual election meeting of the Board held for that purpose. The annual election meeting for the election of directors shall take place in May or June of the calendar year, unless the meeting is set for a different period of the year by resolution of the Board. The exact time and location of the election meeting shall be set by resolution of the Board.

Section 6. Filling Vacancies. The Board of Directors may, by a majority vote, elect new directors to fill any vacancies on the Board, including vacancies created by the passage of a resolution increasing the total number of Board member positions. A director appointed to fill a vacancy shall serve only until the next regular election of directors, at which time she or he must be elected by the Board in order to remain a director.

Section 7. Removal of Director. A director may be removed for causes stated in these bylaws by a majority of the directors in office not counting the director to be removed. A director may be removed without cause by a two-thirds vote of the directors in office, excluding the director to be removed. Notice of the meeting must be given which states that the removal of a director is to be considered at that meeting. A director may be removed for the following causes: repeated failures to attend Board meetings, failing to fulfill the duties required of directors, or intentional acts or omissions, which a prudent person could reasonably have foreseen would seriously damage the reputation or interests of the corporation

Section 8. Resignation of Directors. A director may resign at any time. The resignation of a director must be in writing and be delivered to the Board of Directors, its presiding officer, the president or the secretary. Once delivered, a notice of resignation is irrevocable.

Section 9. Election of Chair and Officers. As soon as possible following each annual election of directors, the Board of Directors shall meet to elect new officers of the corporation.

Section 10. Conduct of Directors. Directors shall discharge their duty of loyalty and their duty of diligence in good faith; with the care an ordinarily prudent person in a like position would exercise under similar circumstances; and in a manner the director reasonably believes to be in the best interest of the corporation.

Section 11. Quorum. At all meetings of the Board of Directors, the presence of a quorum is necessary to allow the transaction of corporate business or making corporate decisions. A quorum is defined as a majority of the number of directors set by prior resolution, or if no specific number of directors has been set, then a quorum is a majority of the number of directors in office immediately before the meeting begins.

Section 12. Decision-Making and Voting. The directors shall diligently and conscientiously attempt to make decisions by consensus. They shall employ all standard consensus practices and techniques including the expression and careful consideration of minority views. Where a consensus apparently cannot be achieved any director may request that a vote be taken instead. All decisions require a clearly stated motion, a second, and a vote that must be recorded in the written minutes. Each member of the Board of Directors shall have one vote. A majority vote of the voting members of the Board at any meeting at which a quorum is present is necessary and sufficient to make a decision of the Board of Directors of The Rhiza Schoolhouse (TRS) Public Charter School unless a greater proportion is required by law or by these bylaws. The name of each director who voted for, against, or abstained for a particular motion shall be recorded in the minutes.

Section 13. No Proxy Voting. There shall be no proxy voting allowed at any meeting of the Board of Directors or as part of reaching any decision of the Board.

Section 14. Meetings. Meetings of the Board of Directors may be called either by the president, the chair of the Board, or by 50% of the directors in office. All meetings of the Board will be open to the public except as provided in ORS 192.610-192.690, the open meeting law.

Section 15. Meetings by Telephone or Other Electronic Communication. When necessary, and when proper notice is given, meetings may be held by telephone or other electronic communication devices in which all participating directors may simultaneously hear and speak with each other. A director participating in such a meeting is deemed present for purposes of a quorum. Such meetings will be conducted in accordance with ORS 192.670.

Section 16. Executive Session Meetings. The Board may hold executive session meetings under the conditions provided in ORS 192.660.

Section 17. Notice of Meetings. Notice of meetings shall be given as required by ORS 192.640.

Section 18. Minutes. Minutes of Board meetings shall be kept as required by ORS 192.650.

Section 19. Authority of Directors. No director may act on behalf of the corporation without specific authorization by the Board to do so.

ARTICLE IV. OFFICERS, CHAIRPERSON, AND STAFF

Section 1. Officers. The officers of The Rhiza Schoolhouse (TRS) Public Charter School shall carry out the policies and decisions of the Board of Directors as directed by the Board. Officers shall include a president, a secretary and a treasurer and may also include one or more vice presidents, a treasurer, and a chairperson, and such other officers as may be elected in accordance with this Article. The same person may not hold the offices of president and secretary at the same time, but the same person may hold any other two offices. Board members and non-Board members are eligible for selection as officers. Officers who are not members of the Board shall have no right to vote on Board decisions.

Section 2. Election and Term of Office. The Board of Directors shall elect the officers of The Rhiza Schoolhouse (TRS) Public Charter School for a one-year term. Election of officers shall be done as soon as possible following the election of directors. Each officer shall hold office until her or his successor has been properly elected, unless she or he resigns.

Section 3. Removal. The Board of Directors may remove any officer elected or appointed by the Board of Directors whenever, in its judgment, the interests of the corporation would be best served by such removal.

Section 4. Vacancies. If any office of the corporation becomes vacant by death, resignation, retirement, removal, disqualification, or any other cause, the directors in office, although less than a quorum, may elect or appoint an officer to fill such a vacancy. The elected officer shall hold office for the unexpired portion of the term of that office.

Section 5. President. The president shall be the principal officer of the corporation and shall, in general, supervise or oversee the supervision of all of the affairs of the corporation. The president generally shall preside at all meetings of the Board of Directors unless the Board selects another person to preside. The president shall also perform other duties as may be assigned by the Board of Directors. The president shall serve as an ex-officio member of all committees.

Section 6. Vice President. In the absence of the president or in the event of the president's inability to act, the vice president shall perform the duties of the president. The vice president, when acting as president, shall have all the powers of and be subject to all the restrictions upon the president.

Section 7. Secretary. The secretary shall perform or oversee the performance of the following duties: a) Record and keep the minutes of the meetings of the Board of Directors or of any Board committees, b) See that all notices are duly given in accord with the provisions of these bylaws or as required by law; c) Be custodian of the corporate records; d) Keep a register of each member's mailing address which shall be provided by such

member; e) Ensure that all required state and federal reports are prepared and filed in a timely fashion; and f) Perform or oversee all duties incident to the office of secretary and such other duties as from time to time may be assigned by the president or by the Board of Directors.

Section 8. Treasurer. The treasurer shall perform or oversee the performance of the following duties: a) Be responsible for the proper management and control of all funds of the corporation; b) Oversee or conduct all financial transactions of the corporation; c) Prepare and keep standard financial records of all of the income and expenses of the corporation; and d) Prepare or assist in the preparation of required state and federal reports with regard to income and disbursements and activities of the corporation.

Section 9. Chair. The Board may elect a Chair and determine his or her duties.

Section 10. Director and Staff. The Board may appoint or employ an executive director or other staff, whether paid or unpaid, to perform and conduct the programs and activities of the organization. Unless the Board determines otherwise, the executive director shall have the power, subject to the rules and regulations set by the Board of Directors and by law to hire staff, fix staff duties, set staff salaries, establish staff performance standards, evaluate the performance of staff, and when necessary, terminate the employment of staff of the corporation.

ARTICLE V. COMMITTEES

Section 1. Establishment. The Board may establish any committee, including standing committees or temporary committees by a resolution of the Board. Such resolutions shall name the committee and the purpose of the committee, shall state whether it is a "Board" committee or a "Non-Board" committee, shall state what powers, authority and duties have been delegated to the committee, how the chair of the committee is appointed, how the members of the committee shall be appointed, and what procedures, if any, the committee shall use in carrying out its work. The Board of Directors shall always have the power to amend, alter or repeal the decisions of its committees, subject to limitations on the unilateral amending of contracts, interference with third party rights, and other legal limitations.

Section 2. Board and Non-Board Committees. The Board may establish "Board" committees to which are delegated part or all of the power of the whole Board to authorize expenditures, adopt budgets, set policy, establish programs or to make other decisions for the corporation. Such committees shall be established by resolution by a majority vote of all directors then in office. Board Committees shall consist of two or more directors, and shall not have any members who are not directors. Executive Committee: An executive committee of the Board may be established by a resolution of the Board, shall be a Board committee, and shall be authorized to exercise the full authority of the Board so far as is allowed by law and the Articles and bylaws of this corporation. The executive committee shall comply with the provisions of the Bylaws concerning the full Board so far as those are reasonably applicable to the Executive Committee. The executive committee must attempt to communicate with the other Board members regarding any significant matters. All Executive Committee decisions shall be recorded in official minutes, which shall be submitted to the full Board. Any director may be a member of the Executive Committee. The Board may at any time pass a resolution modifying or revoking the authority, or changing the persons or the number of persons who serve on the Executive Committee. There shall be no less than three persons on the Executive Committee. The Board may establish "Non-Board" committees, including Working Committees or Advisory Committees, which do not have any part of the power or authority of the Board to authorize expenditures, adopt budgets, set policy, establish programs or to make decisions for the corporation. Such committees shall be established by resolution, by a majority vote of the directors present at a properly called meeting. Any person may be a member of such a committee, whether or not that person is a member of the Board of Directors.

Section 3. Standing Committees: The Board may establish standing committees.

Section 4. Committee Members. The Board shall appoint the members of every Board Committee and of any advisory committees. The members of other committees may be appointed by the Board, or if the Board

wishes, it may delegate that power to the President, the Chair of that committee, or to the initial members of a committee, and the Board may elect to approve, disapprove, or alter the appointment of members of the non-Board committees. The term of office of a member of a committee shall continue as such until his or her successor is appointed unless the committee is terminated, the member resigns or is removed from the committee, or the member ceases to qualify as a member of the committee.

Section 5. Chair. One member of each committee shall be selected or appointed chair by the Board, or if the Board wishes, it may delegate that power to the president or to the members of the committee.

Section 6. Committee Procedures. Unless otherwise specified, Board Committee meetings shall operate with the same quorum and voting requirements as the full Board, and so far, as possible shall operate according to the procedures of the Board as stated in these bylaws. If any formal decision or resolutions are voted on at its committee meeting, then the votes and the resolutions so adopted shall be recorded in the form of corporate minutes and shall be recorded and filed with the secretary.

Section 7. Powers. The Board of Directors shall specify the powers and mission of each Board Committee by written resolution at the time the committee is created or thereafter. Each committee shall have and exercise the authority equivalent to the Board of Directors in the management of the corporation to the extent specified in the written resolution creating the committee, in the Articles of Incorporation and in the bylaws of The Rhiza Schoolhouse (TRS) Public Charter School .

Section 8. Limitation on Powers. No committee may a) Amend or alter the Articles of Incorporation or bylaws; b) Elect, appoint or remove any Officer, member of the Board of Directors, or member of a Board committee; c) Authorize the sale, lease, exchange or mortgage of all or substantially all of the property and assets of the corporation; d) Authorize the dissolution of the corporation; e) Amend, alter or repeal the Articles, the Bylaws or any resolution of the Board of Directors; or authorize the payment of a dividend or any part of the income or profit of the corporation to its directors or officers.

ARTICLE VI. MISCELLANEOUS PROVISIONS

Section 1. Conflict of Interest. A conflict of interest is present when the Board votes on matters that will result in the corporation paying or providing any payment, compensation or tangible benefits to a member of the Board or to a family member or relative of a Board member. Directors and officers of the corporation may enter into financial transactions or contracts with the corporation, subject to the limitations of law. Directors shall declare the existence of any direct or indirect conflict of interest-financial or otherwise-disclose its nature on the record, and abstain from voting on that matter. The rest of the Board must assure that all transactions of the corporation involving the personal financial interests of directors, officers or employees shall adhere to standard business practices without special considerations, special compensation, or special benefit to any person as a result of the corporate role of a director, officer, or employee. A conflict of interest transaction must be approved and authorized by the affirmative vote of a majority of the members of the Board of Directors who do not have a conflict of interest involved in that issue, and those directors are deemed to constitute a quorum so long as more than a single director votes to approve the transaction. Individuals with conflicts of interest may serve on the Board, including staff: independent contractors and others who receive compensation or other tangible benefits from the corporation. However, such persons and their relatives must always constitute less than a majority of the Board.

Section 2. Compensation of Officers and Directors. No member of the Board of Directors or officer shall receive any compensation for fulfilling the responsibilities of a member of the Board of Directors or of an officer. The Board may allow reimbursement for actual expenses incurred by members of the Board of Directors in the course of fulfilling their responsibilities as members of the Board of Directors or as officers. The corporation may pay compensation to its officers or members of the Board of Directors for their services rendered as employees or independent contractors, so long as the required rules for conflicts of interest are followed.

Exhibit 12

EXHIBIT XII 501(c)(3) STATUS

Provide evidence that the school has qualified as an exempt organization under section 501(c)(3) of the Internal Revenue Code or that the school has applied for 501(c)(3) status.

Exhibit 12 - pg 2



Department of the Treasury
Internal Revenue Service
Tax Exempt and Government Entities
P.O. Box 2508
Cincinnati, OH 45201

THE RHIZA SCHOOLHOUSE
C/O HANNAH MORRIS
932 N ALBERTA ST
PORTLAND, OR 97217

Date:
04/15/2022
Employer ID number:
86-3427782
Person to contact:
Name: Mr. Mayom
ID number: 31726
Telephone: 877-829-5500
Accounting period ending:
December 31
Public charity status:
170(b)(1)(A)(ii)
Form 990 / 990-EZ / 990-N required:
Yes
Effective date of exemption:
April 22, 2021
Contribution deductibility:
Yes
Addendum applies:
No
DLN:
26053642009331

Dear Applicant:

We're pleased to tell you we determined you're exempt from federal income tax under Internal Revenue Code (IRC) Section 501(c)(3). Donors can deduct contributions they make to you under IRC Section 170. You're also qualified to receive tax deductible bequests, devises, transfers or gifts under Section 2055, 2106, or 2522. This letter could help resolve questions on your exempt status. Please keep it for your records.

Organizations exempt under IRC Section 501(c)(3) are further classified as either public charities or private foundations. We determined you're a public charity under the IRC Section listed at the top of this letter.

Information for Charter Schools

You're not subject to the specific public charity rules of Revenue Procedure 75-50, 1975-2 C.B., page 587, as long as you operate under a contract with the government. If your method of operation changes to the extent that your charter is not approved, terminated, cancelled or not renewed, you should notify us. You'll also be required to comply with Revenue Procedure 75-50.

If we indicated at the top of this letter that you're required to file Form 990/990-EZ/990-N, our records show you're required to file an annual information return (Form 990 or Form 990-EZ) or electronic notice (Form 990-N, the e-Postcard). If you don't file a required return or notice for three consecutive years, your exempt status will be automatically revoked.

If we indicated at the top of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

Exhibit 12 - pg 3

For important information about your responsibilities as a tax-exempt organization, go to www.irs.gov/charities. Enter "4221-PC" in the search bar to view Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, which describes your recordkeeping, reporting, and disclosure requirements.

Sincerely,

Stephen A. Martin

Stephen A. Martin
Director, Exempt Organizations
Rulings and Agreements

Exhibit 13

EXHIBIT XIII PLAN of SERVICE for ENGLISH LANGUAGE LEARNERS

Provide the ELL plan of service. (For guidance on English Language Learners at charter schools refer to the document, "Title III English Learners Program Guide 2019-20 – Oregon Department of Education", pages 44 and 45, which can be found on the web by doing a search for the title of the document.)

TRS will meet all applicable legal requirements for English Learners ("ELs") relative to annual notification to parents, student identification, placement, program options, EL and core content instruction, teacher qualifications and training, reclassification to Fluent English Proficient (FEP) status, monitoring and evaluation of program effectiveness, and standardized testing requirement. TRS shall implement policies to effectuate proper placement, evaluation, and communication regarding ELs and the rights of parents and students. English Learners and Core Instruction TRS will provide instruction to support English Language Learners in developing the skills needed to meet state standards. Teachers working with ELs will possess the appropriate certifications as required. Teachers with EL certifications will share additional strategies for teaching ELL students and can assist with adapting Montessori materials for EL instruction. The Montessori didactic materials allow students to work concretely with many concepts while acquiring the English vocabulary to communicate those concepts. The ongoing collaboration between students and teachers offers almost continuous opportunities to hear and speak English. The non-competitive school environment and low student-teacher ratio support the student when trying to communicate in a new language. Each student will have a specific written plan of English language support, which will be developed by the teacher, the student, and the parents. TRS will follow all testing timelines to ensure students receive proper instruction, demonstrate a year of growth in language acquisition through a summative assessment, TRS will rely on testing, required and administered through the District. Formative assessment happens daily through teacher observations of students, and TRS will adopt any formative assessment that the district designs or implements in the future to measure the growth of English Language Learners in English acquisition.

Exhibit 14

EXHIBIT XIV 504 PLAN

Provide a plan for serving students that qualify under Section 504 of the Rehabilitation Act of 1973.

TRS acknowledges that it is legally responsible to comply with Section 504 of the Rehabilitation Act of 1973, the Americans with Disabilities Act of 1990 and ORS 659 with respect to its students, staff and patrons. TRS will ensure that a child who has a disability identified under the law receives specialized instruction and related services. The child will also receive accommodations that will ensure their academic success and access to the learning environment. The child's 504 Plan will be updated annually to ensure that the student is receiving the most effective accommodations for his/her specific circumstances.

TRS will coordinate with Portland Public Schools (PPS) District Student Services Department to make arrangements for any necessary special education and related services. Pursuant to Oregon charter school law (ORS 338.165).

- TRS will provide a list of registered students to PPS and request the educational records
- PPS provides educational records and information regarding the students' involvement in special programs
- If student does not qualify for an Individualized Educational Plan (IEP), the resident district will notify TRS and TRS will follow procedures for a regular education student
- If the PPS determines that the student qualifies for IEP services, an IEP meeting is held to determine if the IEP can be implemented by TRS
- If yes, and the IEP can be implemented, TRS will work in a collaborative manner with the IEP service provider to ensure that all Individuals with Disabilities Education Act (IDEA) and Oregon Department of Education (ODE) regulations are met.
- In the event that TRS identifies a student and initiates an IEP evaluation, TRS will notify PPS and go through the steps as outlined above.

The opportunities the Montessori method presents for delivering services to special needs students as part of their IEP in addressing the student's individual needs and their unique learning style. Using the Montessori materials as diagnostic tools as well as the Montessori standard of teacher observation, provide the teacher with the ability to assess students to identify individual learning levels. The self-pacing methods use flexible grouping practices to allow children to advance at their own pace. Self-pacing can be beneficial for all children and is not targeted specifically at those with an IEP, but it can allow children to learn at a highly accelerated rate. Directed Studies are usually based on the student's self-pacing. Children are free to learn at their own rate and level of achievement. The child chooses the activities in which they participate to fulfill assignments and works at his/ her own pace. Through observation and student-teacher conferences, the teacher determines when a student has perfected an exercise and is ready to move to a higher level or more difficult exercise. The teacher provides additional help and instruction if a child performs a task incorrectly. Students will go beyond memorization and repetition to true understanding and application of knowledge, skills, and concepts. The individual student will progress at their own rate, either moving ahead without having to wait for the rest of the group, or taking the time they need to internalize the material.

Montessori classrooms help children with disabilities make choices and become independent learners in many ways. In a Montessori classroom, children may choose any material for which they have had a lesson given by the teacher. The student's activities, therefore, are not predetermined by a teacher's lesson plans. Children with disabilities are afforded the same opportunities to choose materials each day as their typically developing peers. They make truly meaningful choices many times each day. This also fosters

Exhibit 14 - pg 2

independence, because as early as a student's second day, they are encouraged to choose from any of the materials presented the day before. With their first choice, they are taking a step toward becoming an independent learner. Independence is also facilitated by offering children a long uninterrupted block of work time daily, freeing them to truly experience this independent learning style. Work in a Montessori classroom is introduced to children based on individual readiness rather than the average chronological age of classmates. When a student with a disability works on an individual need or skill that is very different from the needs of their peers, they are not set apart as different or viewed as an extra responsibility. Students with disabilities can work with their friends, or alone, as the skill being learned demands. The sequence of a student's lessons may also vary without interrupting the flow of classroom work. Students with disabilities may, when necessary, pass through a skill sequence in a different order or at a different rate than a typical developing peer.

TRS has proposed a year-round calendar and we understand that a plan to serve the students with special needs will need to be developed. Administration, Board members, Teachers and Parents will request best practices from other charter schools within the district who have accommodated special needs students and work with all and the district to ensure the identified student(s) continue to receive services and accommodations throughout the school year.

Exhibit 15

The applicant provided Montessori curriculum scope and sequence, with a summary of Oregon Common Core State Standards. It's a very large file. The information can be provided upon request. See below for contact details.

Tara O'Neil (she/her)
Program Director, Charter Schools
Multiple Pathways to Graduation
Portland Public Schools
taraoneil@pps.net (w)503-916-3359

Exhibit 16

EXHIBIT XVI MARKETING and RECRUITMENT PLAN

Provide the marketing and recruitment plan. Explain how the plan is:

- a. Consistent with the school's mission and goals.
 - a. Specifically designed to reach the school's target population(s).
 - b. Specifically designed to provide equity of access to all students.
-
- a. Consistent with the school's mission and goals
 - b. Specifically designed to reach the school's target population(s).
 - c. Specifically designed to provide equity of access to all students.

The mission of TRS is to recognize the dignity and capacity of all human beings and is committed to serving the students of TRS through the Montessori philosophy and curriculum. TRS recognizes its legal and social responsibility to take all feasible steps to enroll a student population that is reflective of the ethnic and racial diversity in the Portland Public Schools District.

TRS will implement a student recruitment strategy by implementing the following outreach plans:

- Partner with Schola, Schola's mission is to improve education outcomes by placing students in their ideal educational setting.
- Design attractive program informational materials
- The distribution of promotional and informational material that appeals to all of the various racial and ethnic groups represented in the community in which TRS will be located, including Spanish language materials as needed
- Issue press releases and utilize other communication strategies
- Utilize Social Media and TRS website
- Actively recruit students throughout the community
- Participate in local outdoor markets to promote the school and collect information from interested families
- Attend neighborhood association meetings
- Mail information packets to interested families
- An enrollment process that is scheduled and adopted to include a timeline that allows for a broad-based recruiting and application process
- Host open house nights, Montessori informational seminars and other activities during the school year where the community is invited in to learn about TRS
- Host voluntary parent prospective meetings
- Schedule prospective parent meetings
- Schedule school observations

TRS believes that these activities will attract a broad base of applicants by not limiting access to opportunities and information, providing information in multiple languages, and providing information that is accessible to all education levels.

Exhibit 17

**EXHIBIT XVII
POLICIES**

Provide the following policies. You may use separate sheets for each or combine them in one document.

Exhibit 17 - pg 2

A. Student application and admission

- a. All families will receive an application and complete all required sections (i.e. student information, home language information, request authorization for records from previous and/or current school, emergency medical information, and previous Montessori experience.)
- b. Applications will continue to be accepted throughout the year.
- c. Parents and/or guardians will attend an observation session at the school and attend an orientation meeting between October and January to ensure our program is consistent with the family's beliefs and philosophy concerning education.
- d. Applications for the following school year will be due on the last Friday in February
- e. Applications submitted after the due date will be enrolled if spaces are available or will be added to the waitlist after the lottery (when applicable)
- f. If the child is identified for enrollment, they will receive notification of enrollment with 10 days and be provided an enrollment packet with all appropriate information prior to matriculation
 - i. The school district will be notified of the child's enrollment within 10 days
- g. If more applications are received than there are spots available, a public lottery will be held
 - i. The lottery will be conducted on the third Monday in March
 - ii. The lottery will be conducted by an impartial third-party
 - iii. The lottery is weighted based on race, ethnicity, economic status, and English language proficiency. Students need to meet one criteria within the four areas. Students who meet or exceed the needed criteria will be entered into the lottery three times.
 - iv. If there are more applicants than spaces available in a given classroom, a lottery will be held for that classroom.
 - v. Any child who currently attends TRS will not be subject to lottery
 - vi. Children with a sibling already enrolled at TRS will be automatically enrolled, unless there are more siblings than spaces available. In that event, siblings will be in the lottery as a separate group.
 - vii. If a sibling is chosen in the lottery, all other siblings will be given preference if spaces are available.
 - viii. The lottery drawing will rotate in choosing applicants for applicable classrooms.
 - ix. Names will be drawn from oldest to the youngest classrooms, when applicable.

B. Student withdrawal

- a. When a student withdraws voluntarily from TRS to attend another public school, private school or be home-schooled, the student relinquishes their place on the enrolled list. If the student changes their mind, they may ask to reenter, but their name will be placed at the bottom of the waiting list for that grade
- b. When a student withdraws involuntarily for medical reasons, that student maintains their place on the enrolled list until the end of the current school year.
- c. When an admissions situation arises that is not within the policy guidelines established by the TRS Board, a staff review and recommendation will be presented to the Board for final decision.

C. Student promotion and retention

- a. Montessori instruction accommodates the varying interests and academic development of individual students. Students will progress each year by completing the Montessori and State Standard curriculum necessary to support their success at the next grade level.

When considering promotion (accelerating a student to the next grade level), the child's social and emotional growth is to be taken into consideration. Parents, teachers, and the director of TRS will determine if this is the best course of action for the student by using criteria such as; intellectual maturity, academic achievement, including standardized testing, physical, social, psychological, and emotional considerations. Retention (remaining at the same grade level for a second year) is an action that may be taken to assist a student to be more successful in their learning. Risk for retention should be identified as early in a child's school career as possible. As soon as identified, the teachers and director will begin interventions to assist the student in areas of concern. Parents/Guardians will be included in this discussion as early in the school year as possible. Students are to be identified for retention or promotion on the basis of:

- i. Academic achievement and standardized testing;
 - ii. Physical, social, psychological, and emotional considerations;
 - iii. Special needs
 - iv. Information provided by teacher(s), parents, or guardians;
- b. The demonstration of individual student learning is to be measured by, but not limited to, the following:
- i. Student grades in Reading/Language Arts and Math (more than one grade level above / below)
 - ii. Albanesi (Montessori) assessments in Reading/Language Arts and Math (more than one grade level above / below)
 - iii. State testing scores in Language Arts and Math (assessing below or far below basic in all subject levels / assessing at advanced in all subject areas)
 - iv. Writing Assessment (same as above)
 - v. The meeting of the intervention goals determined by the teacher, director in agreement with the parent/guardian.

D. Standards for student behavior including:

- a. Discipline of students
 - i. Montessori philosophy recognizes the importance of an orderly and safe environment as a cornerstone to the learning experience for children. Personal community values such as sharing, kindness, cleanliness, and personal responsibility as well as respect for self, others, and the environment are an integral part of the Montessori experience. As these values are continually modeled and reinforced, children need less and less correction over time.
 - ii. However, if a student persistently has difficulty accepting the school's rules of conduct or engages in dangerous behavior, we will work closely with parents, the student, and the Director to find appropriate solutions.
 - iii. In accordance with the law, TRS incorporates and binds itself to comply with federal due process requirements for suspension and expulsion of regular and special education students.
- b. Discipline of students with disabilities
 - i. For students protected by IDEA, TRS will complete a functional behavior assessment (an inquiry into the circumstances tending to trigger the student's unacceptable behavior) and develop a positive behavior support plan (a behavioral intervention plan) as best practice fito treat students who are only eligible for Section 504 protections similarly.

E. Suspension of students

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- a. For suspension or expulsion of students, TRS will comply, as a public charter school, with ORS 339.240 through ORS 339.280, Student Conduct and Discipline.
 - b. The standards for behavior and the procedures for the discipline, suspension, or expulsion of students for TRS will be consistent with Portland Public Schools as detailed in the Student Rights and Responsibilities Handbook.
 - c. The procedures for handling suspension will follow the outlined suspension procedures as documented on the Portland Public Schools website: <https://www.pps.net/Page/13550>
 - d. The procedures for handling expulsion will follow the outlined expulsion procedures as documented on the Portland Public Schools website: <https://www.pps.net/Page/13548>
- F. Expulsion of students
- a. For suspension or expulsion of students, TRS will comply, as a public charter school, with ORS 339.240 through ORS 339.280, Student Conduct and Discipline.
 - b. The standards for behavior and the procedures for the discipline, suspension, or expulsion of students for TRS will be consistent with Portland Public Schools as detailed in the Student Rights and Responsibilities Handbook.
 - c. The procedures for handling suspension will follow the outlined suspension procedures as documented on the Portland Public Schools website: <https://www.pps.net/Page/13550>
 - d. The procedures for handling expulsion will follow the outlined expulsion procedures as documented on the Portland Public Schools website: <https://www.pps.net/Page/13548>
- G. Student attendance including (Excused, Unexcused, Vacations, Tardiness)
- a. The parent/guardian should inform The Rhiza Schoolhouse (TRS), as early as possible, if their student will be arriving late or will be absent. This can be done by calling the office, emailing or sending a note ahead of time. Students not in class at the start of the school day. must be checked in at the TRS office with their parent/guardian. Unexcused tardies and absences will be notified by a phone call and an email to parents at home or at work. This procedure helps to maintain the safety of all students.
 - b. In compliance with Oregon State Law (ORS 339 010-339.990) requires that students attend school on a regular basis. Eight (8) or more half-day absences in a four-week period are considered a violation of Oregon school attendance requirements. In an attempt to support families who find it challenging to get students to school on a regular basis, administration will contact the parent/guardian to offer bus information or other assistance that may meet family's needs in relation to attendance and/or on time arrival.
- H. Homework
- a. The Montessori student will be expected to read for enjoyment, as assigned and to continue research for classroom related projects. Continuing school-related projects at home also provides parents the opportunity to be involved in and stay current with their children's education. Consequently, the Montessori student naturally develops good study skills, discipline, and responsibility.
- I. Bullying and harassment
- a. Every student at TRS has a right to learn and thrive in a school atmosphere that is conducive to academic achievement and social growth. Any behavior by a student that threatens to disrupt the learning process or pose a danger to others is unacceptable. In the event a student is unable to comply with classroom rules and appropriate behavior, the student will be liable for Breach of Conduct and subject to the actions outlined in TRS Community Code of Conduct Handbook.
 - b. Definitions of bullying/harassment and procedures for handling incidents will follow board policy 4.30.060.

J. Admission of students expelled from other schools and/or districts

- a. TRS will adhere to the admission policy of students expelled from other districts in accordance with ORS 339.030.

K. Volunteers

- a. TRS will develop a Volunteer Code of Conduct in order to promote a safe environment in the school. The code will include, but is not limited to the following:
 - i. Confidentiality
 - ii. Dependability
 - iii. Support
 - iv. Representative and Role Model
- b. Per the Portland Public School policy, all volunteers will be required to:
 - i. Read the [Portland Public School Volunteer Code of Conduct](#)
 - ii. Complete the [Mandatory Volunteer Training](#)
 - iii. Submit a Volunteer Application
 - iv. Submit and pass the volunteer background check
 - v. Pending approval, all volunteers will be required to bring government-issued identification to initial volunteer shift

L. Field trips

- a. Educational field trips can effectively provide extended instruction and enriched student experiences beyond the regular classroom environment. All field trips taken during times when school is in session will directly relate to the instructional program appropriate to the students involved. Equal opportunity to participate in field trips by all of the students will be a requirement for the approval of the field trip. Participation in the field trip shall not be dependent upon the student or parent's ability to pay any portion of the expenses.
- b. GUIDELINES:
 - i. Field trips must directly correlate with the core curriculum standards and be an extension of it.
 - ii. Teacher-pupil preparation and planning for a trip is very important. The teacher should make careful lesson plans for the trip, including learning objectives, methods of assessment, questions to be asked, as well as follow-up activities.
 - iii. Review "standards of conduct" with students prior to the trip. It should be emphasized that each student is an ambassador of the school, and people in the community may make judgments about the entire school based on the conduct of any one student.
 - iv. The teacher will arrange for other adults (chaperones) who understand the purpose of the trip and the established standards of conduct to accompany the group. Chaperones should be assigned on a basis of 1 per 5 students for elementary. Chaperones need to complete a volunteer background check process prior to attending the field trip. Bus drivers cannot be used as chaperones. Chaperones should not bring younger children on field trips. The teacher shall be responsible for the duration of the trip and therefore will not be included in the 1:5 adult ratio. The teacher shall monitor behavior on the trip and be available to intervene as needed to ensure the safety of all involved.
 - v. All special education students are eligible for the same field trips as those in general education. Special education and physically disabled students require special attention as to their ability to ride with or without assistance. The Rhiza Schoolhouse (TRS) is responsible for assisting these students by providing attendants/chaperones.

- vi. A letter requesting permission for students to take the field trip must be sent to the parents prior to the trip. The letter should include the following information:
 1. Purpose of the trip
 2. Place to be visited and address
 3. Day and date of the trip
 4. Estimated time of departure and estimated time of return
 5. Type of transportation
 6. Dress suggestions
 7. Special suggestions (snack, lunch, etc.)
 8. Inquiries to medication, motion sickness, or allergies
 9. All permission letters must be signed and returned to the classroom teacher. No student is allowed to go on a field trip who has not returned a signed permission letter.

M. Staff and student technology and internet use

- a. Students and staff have the responsibility to use technology in an ethical and lawful manner. TRS will follow the guidelines of the District policies for Portland Public Schools Network and Internet use Student and Staff Acceptable Use Guideline. All students and staff are required to read, understand and follow those policies as well.

N. Emergency management and training (include a Healthy & Safe Schools Plan)

- a. Health and Safety policies will be incorporated as appropriate into the school's student and staff handbooks and will be reviewed annually for compliance with Oregon law
- b. The charter school will obtain the fingerprinting and background clearance of employees, contractors, and volunteers prior to employment and/or any more than limited or unsupervised contact with students of the charter school. The Director of the charter school shall monitor compliance with this policy and report to the Board of Directors on a quarterly basis.
- c. All classified and certified staff will be mandated child abuse reporters and follow all applicable reporting laws and the same policies and procedures used by Portland Public Schools.

O. Health

- a. TB Testing: TRS will follow the requirement of requiring tuberculosis testing of all employees prior to commencing employment.
- b. Immunization: TRS shall adhere to all law related to legally required immunizations for entering students pursuant to health and Safety Codes.
- c. Medication in School: TRS shall adhere to policy regarding administration of medication in school.
- d. Vision/Hearing/Scoliosis: TRS shall adhere to policy, as applicable to the grade levels served by the School.
- e. Bloodborne Pathogens: TRS will meet state and federal standards for dealing with bloodborne pathogens and other potentially infectious materials in the workplace. The Board shall establish a written "Exposure Control Plan" designed to protect employees from possible infection due to contact with bloodborne viruses, including human immunodeficiency virus (HIV) and hepatitis B virus (HBV).
 - i. Whenever exposed to blood or other body fluids through injury or accident, students and staff should follow the latest medical protocol for disinfecting procedures.
- f. TRS will maintain a drug, alcohol, and smoke free environment.

P. Safety

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- a. Emergency Preparedness: TRS will adhere to the Emergency Preparedness Handbook, which contains emergency procedures and shall be tailored specifically to the needs of the campus site. This Plan includes, but is not limited to, the following responses: fire, flood, earthquake, threats, hostage situation, and biological and chemical release.
 - b. CPR/First Aid: TRS will require all administrative and instructional staff receive training in emergency response, including "first responder" training, which includes First Aid and CPR.
 - i. Facility Safety: TRS will have a policy that it is housed in facilities that have received fire marshal approval and that have been evaluated by a qualified structural engineer who has determined that the facilities present no substantial seismic safety hazard.
 - c. Annual Site Evaluation: TRS will have an annual site safety evaluation.
 - d. Student Emergency Information: TRS will require that a current Emergency Information Card for each enrolled child is on file at the school so that parents/guardians can be notified promptly in case of accident or illness involving their child.
 - i. Parents will be informed of what to do in case of an emergency in the Student-Family Handbook
- Q. Allowable fees/fines to be charged to families
- a. TRS will only charge fees or fines when not funded by other means and in accordance with ORS 339.155
- R. Every Student Belongs ([OAR 581-022-2312](#))
- a. For 'Every Student Belongs', TRS will comply, as a public charter school, with OAR 581-022-2312, the policy of the State Board of Education that all students, employees, and visitors in public schools are entitled to learn, work, and participate in an environment that is safe and free from discrimination, harassment, and intimidation.

