Submission to the City of Milwaukee Common Council

Application to Establish:

Quest-Milwaukee Charter School

Submitted on:

February 3rd, 2012

The City of Milwaukee
Common Council
c/o The Milwaukee Charter
School Review Committee
200 E. Wells Street
Milwaukee, WI 53202

February 2, 2012

Re: Quest-Milwaukee Charter School Application

On behalf of the Quest Board of Directors, I am pleased to submit this charter application for Quest-Milwaukee, the first school for a proposed network of three schools to be located in the City of Milwaukee. Quest is applying to open this school in the fall of 2013.

We believe that the extensive research and development conducted to support our business plan and our model, coupled with relentless execution, will result in a school that will be a valued asset to the City of Milwaukee for years to come.

Should you have any questions, please don't hesitate to contact me at the address below.

Respectfully submitted,

Edgar T. Russell
Executive Director for Quest
Institute for the Transformation of Learning
Marquette University
750 N. 18th Street
Milwaukee WI 53233
(414) 288-3055 - v

Quest Charter Application Table of Contents

Application Summary Sheet

Name of Applicant: **Quest-Milwaukee, Inc.**

Address of Applicant: **750 North 18ᵗʰ Street**

Phone Number of Applicant: **(414) 288-3055 [office] or (414) 719-0316 [mobile]**

Name of Contact Person: **Edgar Russell**

Application is for a **new** school

Proposed grade levels to serve: **Grades 6 through 12**

Proposed Number of Students to Serve**: 475 students**

Name and title person authorized to bind the corporation: **Edgar Russell, Executive Director**

Mission and vision of the school:

> **The Quest Vision**
> The vision is "To be the most effective network of schools in the United States at closing the achievement gap".

> **Mission**
> The mission is "To ensure that all of our students are college ready at graduation".

Brief Description of the School:

Quest will be unique to the city of Milwaukee and will operate a system of learning environments incorporating blended learning and project based learning as the primary instructional strategies. These environments will be designed to more effectively serve students, especially low-income students.

By the year 2022, Quest schools will graduate over 140 students per year, who will be highly self-directed learners, possessing 21st Century skills that colleges and employers alike will value. Quest graduates will have a variety of post-secondary opportunities and be valued in the community, not only for their academic accomplishments, but also for their contributions to our community.

To meet our objectives for our students, Quest must: (1) recruit and develop the human capital needed to support a new educational model, where students are expected to provide much more input and direction; (2) partner with recruiters to assist us in locating teachers who value teaching at the higher order thinking skills and aren't afraid to give up most of their drill and practice activities; (3) keep abreast of the latest thinking on what high productivity learning environments look like and be ready to evaluate those new models for inclusion in the evolving Quest model; (4) monitor and evaluate developments in project-based learning and be ready to implement the best and promising practices; (5) show leadership and resiliency in implementing these high productivity models with fidelity and be uncompromising in obtaining the best that these models have to offer our students; (6) execute our

plans within our designed framework and create a mindset for flawless school launches; (7) be vigilant in securing facilities that support the vision and mission of Quest schools.

The 'K12 factory' has its roots in the industrial age and the goals for the current design have not changed very much in the last 100 years. Meanwhile the structural costs associated with school have changed dramatically. The K12 system of schools is no longer financially viable. Structural costs increases of 4 – 8 percent per year force schools to raise more capital or increase class sizes.

We've spent billions on computers and yet little has changed in the way teaching and learning occurs. Technology, and its ability to individualize educational experiences, will deliver the type of personalization our students need. Blended learning is a promising technology-based delivery method. With this method students split their time being supervised by a classroom teacher and receiving instruction through e-learning. Data is showing that blended learning is more effective than traditional instruction.

The flex model of blended learning allows Quest to rethink how learning occurs and to develop a school that maximizes the use of resources. Our e-learning platform will be aligned to the Common Core standards, providing an overarching guide for instructional content, regardless of the delivery method used. Teachers will have a high degree of flexibility in determining how to ensure that the instruction fulfills the Common Core standards.

Another recent area of innovation is in high productivity education models. These models seek to overcome many of the 'K12 factory' limitations by harnessing untapped student productivity and enhancing teacher productivity. Teacher labor is typically fully utilized, while students have untapped potential to work. This source of labor remains largely underutilized, because harnessing it requires a paradigm shift. Quest will ensure that student labor is fully utilized, by more fully engaging each student and giving them more responsibility through self-direction.

Quest schools will place students at the core of their learning, both as planners and as participants. Doing so, recognizes that all students welcome the opportunity to work at educational tasks that they see as relevant to real world needs. However, full personalization cannot take place at scale, without technology. Technology becomes an enabler for the level of differentiation needed in our schools. Quest schools will harness the power of technology to ensure that each student receives all the support needed for them to realize their educational aspirations.

Quest will use Project base learning to assist students in tying together discreet knowledge. Projects will be designed to elicit student work that covers appropriate standards and presents opportunities for students to demonstrate their mastery of current and previous years' standards. This will enable students to build a sense of relevancy to previously learned material.

We will consider using project focuses to establish specialty areas for our school, such as: Sustainability, Organizational Quality, Social Responsibility, Social Justice, Business Management, Non-Profit Management, or Music Arts. A central tenet of our approach to projects is that they have a high degree of relevancy and produce an outcome intended to improve the community.

Quest will incorporate an asset building approach for students, allowing them to explore their strengths and build on them. Projects assessments will incorporate assessments of specific developmental competencies, which are holistic lenses for viewing academic and non-academic development.

This approach will include a reflective planning process for each student. The level of rigor in this process will be grade appropriate, and documented electronically via Project Foundry. Students will use information from their e-portfolio to build on their strengths, through multiple iterations of reflection and work.

Student Advisory will also help develop school culture. To leverage staff resources in this area, Edmodo will be used. This platform will link together students, teachers and parents in on-line communities, only assessable to school-related parties. These communities will enhance communications in and out of the school and will be arranged to mirror our student advisories.

Getting and keeping parents involved in middle and high school levels is a challenge. We will implement Student-Led Conferencing to keep parents engaged in their students work and to help students produce their best work. Quest will also use student demonstrations or presentations of projects as an opportunity to invite the community into the school to see and encourage student performance.

The robust Quest model will produce results in the academic and non-academic realm and will, itself be an asset to the city of Milwaukee.

Section I: School Operations

Quest Background

Quest began as a project under the Center for the Transformation of Learning at Marquette University. The project was funded by the Walton Family Foundation as part of their 'Focus on Education Reform'. Milwaukee is a demonstration site for this initiative.

The Quest Vision

The vision is "To be the most effective network of schools in the United States at closing the achievement gap".

Mission

The mission is "To ensure that all of our students are college ready at graduation".

Quest Beliefs & Values

Quest believes in serving low-income and underserved communities by:
1. Preparing students for life-fulfilling options, including: attending college, joining the workforce becoming an entrepreneur, or actively participating in the democratic processes of this country
2. Creating an expectation of doing one's best in each endeavor
3. Addressing the individualized needs of each student
4. Providing a quality investment in human capital
5. Facilitating effective parent engagement
6. Creating a school commitment of reinvestment in our community

Quest Strategies and Objectives

Quest schools will operate in accordance to the Quest Vision, Mission, and Beliefs; while observing the following strategies:

1. Making data-based decisions at all levels. Classroom Examples: interim assessments, authentic assessments, school culture metrics. Administrative Examples: administrative cost per student, parent communications effectiveness, and school to school comparisons. Board Examples include: network operating effectives, network academic performance, and network benchmarking. More specific metrics include:
    a. Matriculating 8th graders will have passed 3 high school courses, prior to 9th grade.
    b. That 12th grade graduates will have passed 4 AP or college level courses, prior to their freshman year of college.
2. Maintaining a culture that embraces and strives for continuous improvement. Examples include: A team based structure that understands the nature of processes and seeks to improve them.
    a. The Center of Support costs are reduced by at least 1% every year.
    b. That Quest students, schools, staff, and the Center of Support will always seek to create and exceed their organizational and personal bests in performance.
3. Creating an environment that supports the relentless and collaborative pursuit of results
    a. That Quest graduates will achieve an average of 21.5 on their ACT tests.

b. That Quest graduates will master the use of 21st Century Skills.
c. That Quest schools will exceed the state average on the mandated achievement test.
4. Finding and supporting passionate, talented and resilient teachers, leaders and board members
    a. Achieving a staff retention rate of 90% after the first 5 years of operations.
    b. Compensating staff at a rate above the area district average.
5. Establishing relevant and rigorous high standards (operational and academic)
    a. Quest 12th grade graduates will have a remediation rate that is 10% or less than that of their peers, with the ultimate goal of 0% remediation for our graduates.
    b. All Quest 12th grade graduates will have served at least 100 hours of community service or interning by their graduation.

These objectives will become the standards for evaluating the actions of all stakeholders: Quest staff members, students, parents, adult volunteers and anyone whom we enlist for the purposes of fulfilling the Quest Vision.

Figure 1. The Quest Model.

The Governance of Quest

Legal Status

Quest is a non-stock, legal Wisconsin non-profit corporation that will apply for 501(c)(3) non-profit status. The school will be led by the Quest Board of Directors, herein known as the Board, pursuant to its corporate bylaws and articles of incorporation. See Attachment 'B' for the Quest Articles of Incorporation, Bylaws and Conflict of Interest Policy.

Organizational Structure

Quest intends to eventually open 3 blended learning schools in Milwaukee serving students in grades 6 through 12. This application is for the first of those schools, which will be called Quest-Milwaukee. The structure below reflects the first year of Quest-Milwaukee operations. The Board will oversee the Executive Director, who in turn, will oversee the Center of Support staff and the School Director(s) at each of our schools.
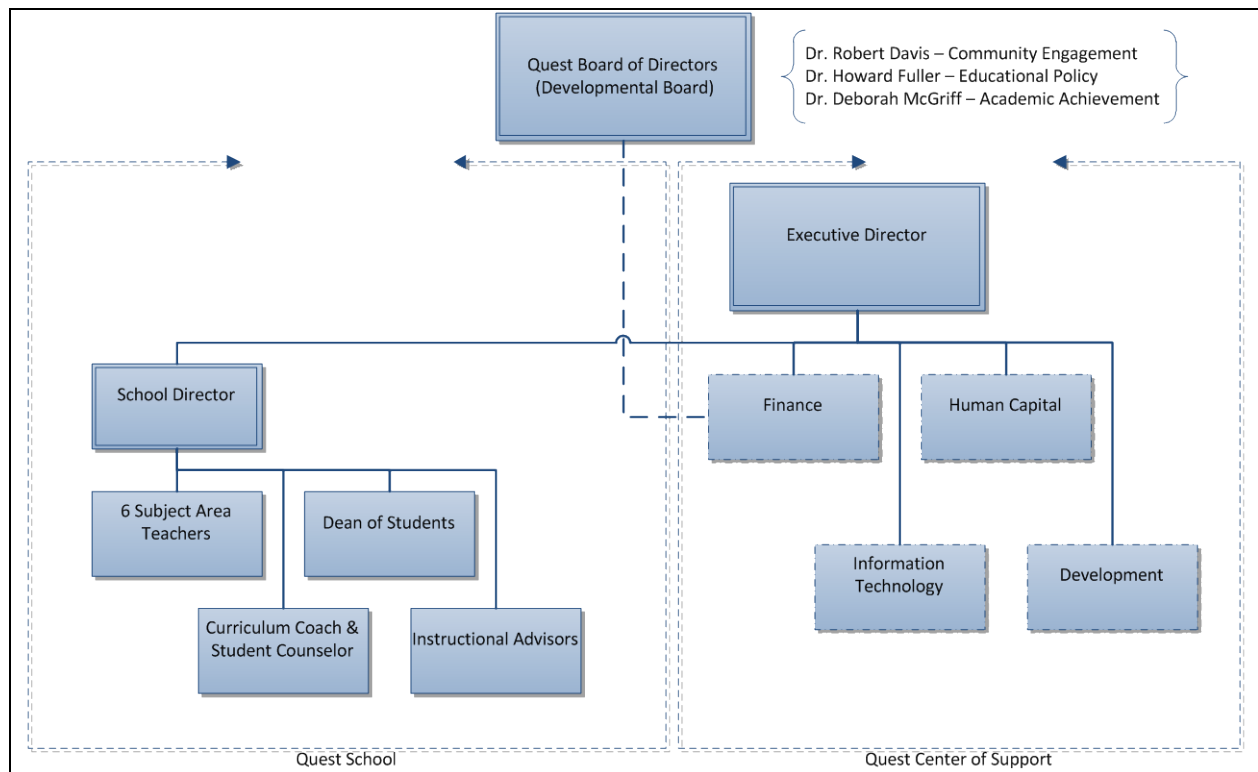
Figure 2. Organizational Chart.

Board of Directors

The Quest Board of Directors will have the ultimate responsibility for all operational and strategic activities of the Quest network. The Board will have the responsibility of ensuring that Quest is

responsive to the Milwaukee community and the Milwaukee Common Council, the Milwaukee Charter School Review Committee.

The Board will govern primarily through the development and approval of policies. These policies will be in response to internally determined opportunities for improvement and to external needs, such as new legislation or administrative rules that require changes in governance to implement. These new policies will then become the responsibility of the Executive Director to translate into implementable, operational actions and outcomes.

The Executive Director is the primary employee of the Board. The Finance Director has a dual reporting relationship, in that he or she will report to the Board on issues regarding the long-term financial health of Quest, and to the Executive Director for day-to-day operational issues related to financial processes and procedures. It is the Executive Directors responsibility to collaborate with the Finance Director in providing financial remediation measures, in response to any changes in financial conditions (e.g., missing enrollment targets or costs that don't align with revenue targets).

Board Duties
The Board will meet at least quarterly (more often if necessary). The current developmental Board is comprised of 3 members and upon the approval of this charter application, will be expanded. The Board maximum size is 15 members. The Executive Director is an ex-officio member of the Board and this position does not count as part of the Board size (see attachment 'B' for more details).

The terms for Board members will be staggered to maintain continuity in direction and governance. At its first meeting, the Board will determine, by lot, the initial term of each director. Thereafter, the term of each director will be 3 years. The Board has the authority to initiate any program that does not, in and of itself, create a conflict of interest or that is not in conflict with any existing law.

One parent member from each school will be appointed to the Board. Quest will recruit Board members from the Milwaukee area. Priority will be given to recruiting Board members who possess the following attributes:
- Charter school operations
- Real estate expertise
- Legal expertise
- Technological expertise
- College access expertise
- Financial expertise in a service related industry
- Fundraising and development expertise
- Social media expertise
- Significant involvement in the communities served by Quest schools
- Subject and professional development knowledge in literacy and math
- Parents with the capacity support a leadership role on the Quest Board

Board members are responsible for:
- Approval of bylaws, resolutions, and policies and procedures for network operation
- Approval of all changes to each school charter to be submitted as necessary in accordance with applicable law
- Approval of the annual school budget, calendar, and salary schedules
- Setting the enrollment and grade-level configuration for Quest schools, including increasing enrollment to maximum levels , subject to authorization from the City of Milwaukee
- Negotiation and approval of the Memorandum of Understanding or other contracts with the City of Milwaukee
- Approval of all addendums and changes to the:
    - Quest Financial Policies and Procedures Manual
    - Quest Human Resources Policies and Procedures Manual
    - Quest IDEA Handbook
    - Quest Parent/Student Handbook
    - Quest Operations Manual
- Approving the enrollment and grade-level configuration for the each school
- Oversight of personnel actions (e.g. hiring, discipline, dismissal)
    - All personnel actions other than those relating to the School Director shall be preceded by a written recommendation from the School Director
- Approval of the fund development strategy
- Participation as necessary in dispute resolution
- Monitoring overall academic performance
- Evaluation of the Quest Executive Director and participation in the evaluation of School Director(s)
- Monitoring the performance of each charter school and taking necessary action to ensure that each school remains true to the Quest Mission and its City charter
- Monitoring the fiscal solvency of the Quest network
- Participation in the Quest annual independent fiscal audit of its schools
- Participation as necessary in student expulsion matters pursuant to Quest policy
- Increasing public awareness of the Quest network of schools

The Board of Directors will meet regularly to review and act on its responsibilities. As long as quorum exists, as defined by the Corporate Bylaws, measures voted on by the Board of Directors may be passed with a simple majority of present members. The Board of Directors meetings will be headed by the Board Chairman and shall comply with Wisconsin Open Meetings Law

Board Training
The Quest Board of Directors shall participate in regular professional training regarding board governance, strategic planning and conflicts of interest rules, which are located within the Bylaws (see

Attachment B). An on-boarding process for new members will be developed to ensure that each member understands his or her role on the board and is prepared to fulfill that role.

School Governance

At each school, the School Director will have broad latitude to do what is necessary for their school to effectively serve each student. The School Director will oversee a staff consisting of: a Dean of Students, Subject Area Teachers, a Curriculum Coach, a Student Counselor, Instructional Advisors and an Administrative Assistant.

Dispute Resolution

Quest is committed to ensuring that the voices of all stakeholders are heard. To that end, if a student has a dispute with another student, every attempt will be made to have the two students reach an acceptable resolution, without guidance from an adult. Students will receive instruction in a peer to peer mediation process as part of their in-coming orientation (Quest 101 - Boot Camp).

If this is not successful, another attempt will be made with guidance from an adult as a mediator. If this is not successful, Quest will involve the following in successive iterations, attempting to reach resolution: a second adult, the School Counselor, the Dean of Students, the School Director.

If the dispute is between the student and a teacher, Quest will involve the parents after attempting to resolve the issue with the Dean of Students or the School Director as the mediator. For issues between a parent and any school staff member, Quest will involve the parent and that staff member's supervisor.

Parent Participation

On an individual basis, parents will be engaged through the following academic activities:

- Student goal setting – part of the student Individual Learning Plan process requires parental or guardian input
- Project Showcases – Parents and the community will be invited to the school to be a part of project demonstrations
- Student led parent teacher conferences – Parents will have the opportunity to see students present their projects that display areas of strength and areas of growth

As Quest schools are being established to serve the needs of the students and their families, there are a number of ways that parents may participate in the leadership of the school. Quest schools will encourage parents to create a Parent/Teacher Council ("PTC") to facilitate communication among parents, teachers and the Board as well as to promote cultural and social activities within the school community. The PTC will:

- Serve as a forum for the discussion of matters of interest and concern to the parents of Quest students
- Act as a communication channel between parents and other interested individuals and groups, both within and outside the school community

- Coordinate and sponsor committees, clubs and other activities that enhance the intrinsic value of Quest Schools and contribute to the fulfillment of its mission
- Fundraising - parents and community members work with Quest Schools to raise additional resources to support students and the school program
- Coordinate PTC fundraising activities and oversee the allocation and disbursement of funds raised by the PTC
- Report as needed to the Quest Board of Directors at its regular meetings and provide ongoing advice to the Board as requested by the Board or deemed necessary by the PTC

Additional Opportunities for Parent Involvement

- School and staff evaluations - parents will be asked to complete an annual climate survey evaluating the school's strengths and weaknesses. The staff will review this feedback as part of the ongoing continuous improvement at Quest
- Advocacy - parents and community members will be asked to communicate the school design and outcomes to the public, educators and policy makers and advocate for necessary policies and resources
- Volunteer opportunities — the School Director(s) will maintain a list of various opportunities for parents to volunteer at Quest schools. For example, parents have the opportunity to help in classrooms, lead extracurricular activities; assist in event planning, attend field trips and serve on parent committees

Parents who volunteer at the school will be required to undergo the same time of background check that is used when hiring teachers. This is for student safety and there will be no exceptions. Results of these background reports will remain confidential and be shared only with the potential parent volunteer. This will allow the volunteer candidate an opportunity to clarify or correct any findings that results from the background check.

To gauge our effectiveness with parent engagement, Quest will use the following measures:

- Percent of parents who participate in student goal setting
- Percent of parents who attend project showcases,
- Percent of parents who attend parent teacher conferences
- Parent volunteer hours - average per parent and total hours

Operations and Fiscal Management of School Roles and Responsibilities

School Director

The Quest Board of Directors intends to hire a School Director who will be responsible for creating a school capable of achieving the Quest mission and goals. This will include leading the school in all aspects of its day to day operations, working with the Executive Director, the Board of Directors, the PTC, students, parents, and community members, and the other governing bodies specified by local and

state law. The School Directors operational and fiscal management duties shall include, but are not limited to, the following:

- Instructional Leadership
- School Morale
- School Improvement
- Personnel Management
- Management of Fiscal, Administrative and Facilities Functions
- Student Management
- School and Community Relations
- Professional Growth and Development
- Board Relations
- Supervisory Responsibilities

The Center of Support will recruit and screen all school employees. The School Director will have the responsibility of hiring the following employees:

Administrative Assistant

Provide assistance of clerical and receptionist duties to ensure the efficient operation of the school or network office administration with direct supervision.

Curriculum Coach

Assist the School Director in the instructional program administration and school level data gathering and analysis. Maintain database of students assigned to interventions.   Act as the primary registrar of students on to the various instructional platforms.   Support teachers and students in their navigation and use of instructional technology.

Dean of Students

Develop and maintain a school culture that supports the Quest mission and vision. Assist the Director in instructional program administration and school level operations.   Act as the 'chief culture officer' of the school. Own the discipline process and ensure that it positively supports student growth.

Instructional Advisor

Under the direction of the Instructional Coach, assist certificated teachers in providing computerized instruction to individual and small groups of students in assigned learning activities. Organize and maintain the schools computer lab space; provide students with intensified learning experiences utilizing educational software to reinforce instruction in specified academic areas. Tutor, train, and assist students in the use of various instructional technologies.

Information Technology Technician

Manage the effective availability of technology in the instructional environment. Support the use of technology throughout the school, by troubleshooting, training, demonstrating and coaching, employees and students.

School Counselor

Develop, implement, and assess a comprehensive guidance program for the school including counseling services. Promote a guidance program that shows students how their personal growth and development can be maximized. Maintain the advisory curriculum for the school.

Special Education Teacher

Provide special education students with appropriate learning activities and experiences that will enable them to fulfill their potential for intellectual, emotional, physical and social growth. Develop student ability level instructional materials through modified curriculum and prepared lesson plans. Conduct work in self-contained, team, departmental or itinerant capacity as necessary.

Teacher

Provide students with appropriate educational activities and experiences that will enable them to fulfill their potential for intellectual, emotional, physical and social growth. Help students develop the skills necessary to be productive members of society.

The full job descriptions, for these positions, appear in Section 6 of this application.

Quest Center of Support

In order to allow the School Director to focus most of his or her energy on instructional management, Quest will utilize operational and fiscal management services from the Quest Center of Support. The Quest Center of Support will provide the following services to Quest Schools:

- Creating each school, including, but not limited to, any and all required legal and financial filings
- Creating, preparing and submitting each schools charter
- Researching, locating and preparing a suitable facility for the operation of the School
- Researching, providing or preparing for any future expansion of the facility to accommodate growth of the school
- Providing professional development training for certain employees of the school prior to the commencement of the school year and continuing throughout the school year as necessary
- Providing back office services, such as accounting, accounts payable, payroll, human resources, information technology, and supervising the annual budget process
- Supporting the implementation and the ongoing improvements in utilization of the Power School Student Information System (SIS)
- Developing and executing fundraising opportunities

- Working with the City of Milwaukee, the Charter School Review Committee, and other agencies as necessary, including complying with reporting requirements and any other general inquiries received from these agencies
- Supporting parent engagement and general marketing for student enrollment
- Directing public relations
- Writing grants for state and other funding
- Providing guidance relating to the curriculum
- Providing oversight to information technology
- Securing working capital financing for the school
- Providing any other operational or educational needs relating to each school that the Center of Support may reasonably provide
- Collecting Special Education funds and managing the Special Education program budget on behalf of all Quest schools and therefore having the ability to collaboratively determine the allocation of Special Education dollars based on Special Education needs at each school

The Executive Director will have oversight of the Quest network and will represent Quest to governmental, funding, and other stakeholders. He will collaborate with the Board to hire the 1st School Director (also referred to as the Co-Developer) and have the responsibility of recruiting and hiring employees for the CoS. These employees include the following positions:

School Custodians

> Work at general maintenance and repair of school facilities, including but not limited to, mechanical, electrical, and sanitary systems. Assist with grounds maintenance.

Director of Finances

> Oversee and maintain the operation of all financial affairs of the network including accounting, payroll, purchasing, and risk management. Act as the chief financial adviser for the Quest Board of Directors.

Director of Information Technology

> Manage the effective use of technology in the instructional environment. Ensure support of technology throughout the Quest network of schools.

Director of Management Services

> Primary Role and Purpose: Oversee and maintain the operation of all 'back office' business operations. If the Finance Director is not available, oversee facilities, accounting, payroll, purchasing, and risk management and act as the financial advisor to the Executive Director and the Board of Directors.

Director of School Services

Act as the academic leader of the Quest network, coaching, supporting and developing school leaders to meet ambitious school performance goals. Oversee School Services in a network of three schools in Milwaukee. This is an extraordinary opportunity for an educator to work closely with high performing, results-oriented School Directors and serve as a thought partner with multiple teams throughout the network.

School Director (Principal)

Operate as the educational leader and chief educational officer of the school while implementing policies set by the board of directors and initiatives established with the Executive Director. Assume administrative responsibility for the planning, operation, supervision, evaluation and improvement of the education programs. Collaborate with the charter operational personnel to ensure that services and facilities support students and the school staff.

Intended Hiring Timeframes

In the table below, the hiring table for the first school is listed. The Executive Director will be brought on board in School Year (SY) 2012.

School Staff Title	13-14 SY	14-15 SY	15-16 SY	16-17 SY
Director	1 FTE	1 FTE	1 FTE	1 FTE
Dean of Students		1 FTE	1 FTE	1 FTE
Dean of Students			1 FTE	1 FTE
Curriculum Coach (curriculum & instruction)	1 FTE	1 FTE	1 FTE	1 FTE
ELA Teacher	1 FTE	1 FTE	1 FTE	1 FTE
Math Teacher	1 FTE	1 FTE	1 FTE	1 FTE
Science Teacher	1 FTE	1 FTE	1 FTE	1 FTE
Social Studies Teacher	1 FTE	1 FTE	1 FTE	1 FTE
Physical Education Teacher	1 FTE	1 FTE	1 FTE	1 FTE
Part Time Arts and Humanities	1 FTE	1 FTE	1 FTE	1 FTE
ELA Teacher			1 FTE	1 FTE
Math Teacher			1 FTE	1 FTE
Science Teacher			1 FTE	1 FTE
Social Studies Teacher			1 FTE	1 FTE
Physical Education Teacher			1 FTE	1 FTE
Part Time Arts and Humanities				1 FTE
Instructional Advisor 1 (para-professional)	1 FTE	1 FTE	1 FTE	1 FTE
Instructional Advisor 2		1 FTE	1 FTE	1 FTE
Instructional Advisor 3			1 FTE	1 FTE
Instructional Advisor 4				1 FTE

Academic Counselor	0.5 FTE	1 FTE	1 FTE	1 FTE
Special Education Teacher	1 FTE	1 FTE	1 FTE	1 FTE
Secretary	1 FTE	1 FTE	1 FTE	1 FTE
IT Technician	0.5 FTE	1 FTE	1 FTE	1 FTE

Center of Support Staff	13-14 SY	14-15 SY	15-16 SY	16-17 SY
Director of School Services				1 FTE
Director of Management Services				1 FTE
Director of IT			1 FTE	1 FTE
Principal for year 2013-14	1 FTE			
Principal for year 2015-16			1 FTE	
Principal for year 2016-17				1 FTE
Administrative Assistant			1 FTE	1 FTE

Table 1. Hiring Table.

Additional Documents

There are additional documents that support this application, including:

- The Human Resource Policies and Procedures Manual - located in Attachment 'D'
- The Financial Policies and Procedures Manual - located in Attachment 'D'
- The IDEA Policies and Procedures Manual - located in Attachment 'D'
- The Operations Manual - located in Attachment 'D'
- The Quest Business Plan - located in Section 6

The Quest Center of Support and Quest Schools will comply with all City of Milwaukee Charter School financial reporting requirements and procedures.

Budget

A complete proposed budget is attached to this application as Attachment H. Included is a one-year cash-flow budget and an eight-year budget projection. All assumptions are listed on the notes tab that corresponds to the budget document and two alternate enrollment scenarios, 15% below enrollment and 30% below enrollment. These scenarios are included in Attachment H. As shown in the eight year budget projection, Quest-Milwaukee school will be sustainable in each year of its operation.

Contingency for Enrollment at 15% Less Than Budget

In the advent that enrollment is lower than projected; a number of contingencies will be executed. These contingences allow the instructional program to maintain a high level of integrity, while meeting the fiduciary responsibilities of the school and network. These contingences include:

- Delaying the hiring of support staff
- Delaying the starting years of certain instructional staff
- Scaling back on field trips

- Purchasing less furniture
- Purchasing fewer materials and technology-in response to the lower enrollment
- Reducing overhead costs and delaying the hiring of senior staff

Contingency for Enrollment at 30% Less Than Budget

The areas change to cover the more unlikely scenario of missing our enrollment targets by 30% include:

- Delaying the hiring of support staff
- Keeping teachers at part-time positions longer
- Scaling back on field trips
- Purchasing less furniture
- Delaying the start of the arts curriculum
- Delaying some of the staff professional development
- Purchasing fewer materials and technology-in response to the lower enrollment
- Reducing overhead costs and delaying the hiring of senior staff

Facilities

Quest Milwaukee has met with Illinois Facility Fund (IFF) to discuss facility parameters that are suitable for Quest's program model, the occupancy budget, location, and strategies for securing a facility in anticipation of the 2013 school opening. Quest has asked IFF for a proposal to assist with site identification. In selecting facilities, Quest will prioritize facilities located in or near one of Milwaukee's highest need north side zip codes, as identified in the recent IFF report 'Choosing Performance: An Analysis of School Location and Performance in Milwaukee.'

Quest intends to begin the site selection process as soon as our charter application is approved or no later than spring, 2012. Quest expects to execute a purchase or lease contract in the fall of 2012. Quest will notify the Charter School Review Committee (CSRC) upon selection of the facility location and provide the appropriate compliance materials according to deadlines established by the CSRC.

The Ideal Facility

Quest believes that the space should have the feel of an open-concept space, but also have a comfortable feel to it, that will grant students a level of security and privacy. The space should reflect the 3 student grouping Quest is considering:

- The 6th and 7th grade students
- The 8th through 10th grade students
- The 11th and 12th grade students

The space should support the needs of each of these groupings. The building should enhance a feeling of progression as students move from one grade group to the next. In working with IFF, Quest has budgeted for a 40,000 square foot space. The space depicted in Figure 3 is how Quest envisions this space might be arranged.

However, Quest has a contingency plan that if such a space is not available, Quest might acquire a 27,000 square foot space, to use for our first three years. This would allow Quest to continue to search for a more suitable facility, while Quest obtains valuable operational experience.
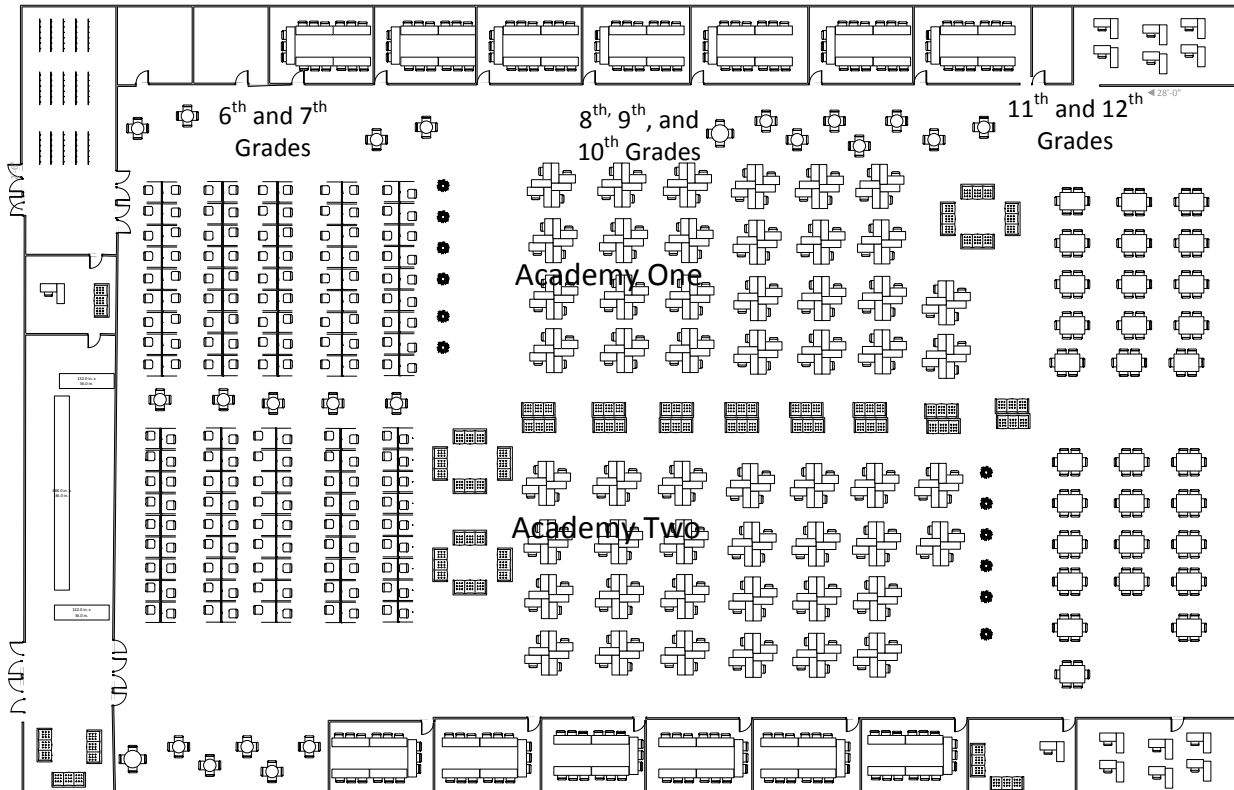

Figure 3. Ideal Facility Space.

Insurance

Please see Attachment Q for a letter describing intent to provide coverage for Quest Milwaukee Public School. Per the application instructions, an occurrence form with minimum liability insurance coverage will be provided to the CSRC within 30 days of final execution of a charter contract between Quest Education Wisconsin Regional Support Office and City of Milwaukee. The establishment of or operation of the Charter School shall not have any impact on the liability of the City of Milwaukee.

Quest will obtain insurance coverage for at least the levels stipulated by contract along with all requirements stated in the application, within 30 days of contract execution. Quest will also notify the City of any cancellation, non-renewal, or material change by any of the Quest insurers.

Audits

No current audit has been performed on Quest financial transactions. An independent audit engagement letter for the first fiscal year can be found in Attachment R.

Section II: Educational Program

The Quest Vision

The vision is "To be the most effective network of schools in the United States at closing the achievement gap".

Mission

The mission is "To ensure that all of our students are college ready at graduation".

Academic Goals

To achieve our mission, Quest has identified the following instructional aims:

1. Matriculating 8th graders will have passed 3 high school courses, prior to 9th grade.
2. Twelfth grade graduates will have passed 4 AP or college level courses, prior to their freshman year of college.
3. Quest students, schools, staff, and the Center of Support will always seek to create and exceed their organizational and personal bests in performance.
4. Quest graduates will master the use of 21st Century Skills.
5. Quest graduates will achieve an average of 21.5 on their ACT tests.
6. Quest schools will exceed the state average on the mandated achievement test.
7. Achieve a staff retention rate of 90% after the first 5 years of operations.
8. Compensate staff at a rate above the area district average.
9. Quest 12th grade graduates will have a remediation rate that is 10% or less than that of their peers, with the ultimate goal of 0% remediation for Quest graduates.
10. All Quest 12th grade graduates will have served at least 100 hours of community service or internships by their graduation.

Educational Program

Middle School (grades 6 – 8)	High School (grades 9 – 12)
3 Credits of English	4 Credits of English
3 Credits of Math	4 Credits of Math
2 Credits of Social Studies	3 Credits of Social Studies
2 Credits of Science	3 Credits of Science
1 Credit of Fine Arts	1 Credit of Fine Arts
1 Credit of Spanish	3 Credits of Spanish
1.5 Credits of Physical Education	1.5 Credits of Physical Education
1.5 Credits of Electives	2.0 Credits of Electives
0.5 Credits of Health (earned in grades 7 – 12)	0.5 Credits of Health (earned in grades 7 – 12)
20 hours of Community Service per year	40 hours of Community Service per year
15.5 Credits	**23 Credits**

Table 1. Instructional Requirements.

Methods of Instruction

The means and methods Quest will use to achieve our instructional aims include using a high productivity instructional system that is capable of delivering greater than 1 year of growth for every academic year. This instructional system functions within a Response to Intervention (RTI) framework that is intended to provide more instructional time for students with the greatest need.

The introduction of brain-based learning, tied to data informed instruction also promises to consistently provide greater than 1 grade per year of growth, helping to further narrow the achievement gap. Quest schools will utilize the latest of research on brain-based learning to ensure that educational activities are enhances with the rich findings in this area.

Also as part of our instruction, Quest will present workshops for instructional extensions and remediation. Project Based learning will be used as the method of bringing relevancy to content strands and to integrate learning across strands. Extended learning, discussed later, will both be implemented as part of the Quest instructional model.

High Productivity System

The Quest network of schools will utilize high productivity approaches to learning, which maximize the use of finite funding and teaching resources. Quest believes that this focus makes our schools fairly unique in comparison to other Milwaukee area schools. One lever Quest will use to gain higher levels of productivity is blended learning, where face-to-face instruction is complemented by on-line learning. This model of learning uses an instructional platform to deliver most of the curricula. Teachers provide face-to-face support on a flexible, adaptive, as-needed, basis through in-person tutoring sessions and small group instructional sessions.

Blended learning offers the opportunity to rethink how learning occurs and for Quest schools to maximize the use of instructional resources. The model is a paradigm shift away from how many schools operate. Part of the Quest paradigm change, also involves how student labor is used. In the traditional classroom, students far outnumber teachers. However, teachers' labor is fully utilized, while students have untapped potential to do more work toward improving their own academic achievement.

This source of labor remains underutilized, largely because students and teachers do not move through the material in unison, even though the instruction is presented in a way that assumes that they are synchronized In a blended learning environment, students can accelerate their learning by learning at their more natural pace – some moving slower others moving faster. This benefit, from blended learning, frees up teachers to focus on more differentiation and individuation of instruction, for all students. Quest will ensure that student labor is more fully utilized, which has the added benefit of more fully engaging each student.

If students are given the responsibility and expectation that they are to be self-directed, they will step up to the challenge. Students welcome the opportunity to work at educational tasks they see as relevant to real world needs. Quest schools will place students at the core of their learning, as planners, participants, and evaluators.

Personalized Education

Placing students at the center of their learning also requires recognizing that there is no single curriculum that is right for all students. It is important to know where each student is in his or her journey and then to assist each student in making progress with their journey.   Quest will ensure that each student receives a high degree of personalization in their educational experience. This outcome will be accomplished through a mixture of projects and Individual Learning Plans, which students will author; with assistance from parents, guardians, teachers, and/or advisory leaders – during Career Planning activities.

However, full personalization cannot take place at scale, without the strategic use of technology. Technology becomes an enabler for us to provide the level of instructional differentiation needed in our schools. Quest schools will harness the power of online-learning, on-line assessments, dedicated social media, and academic data delivered to the desktop in order to ensure that each student receives all the information and support needed for them to realize their educational aspirations and potential in preparation for college.

Standards Based Curriculum

The primary instructional source will be through an instructional platform, similar to *e-2020*. The instructional platform will be aligned to the *Common Core State Standards (CCSS)*, which will provide an overarching guide for instructional content, regardless of the delivery method used. While these standards articulate what will be taught and impact how the school measures academic performance, teachers will have a high degree of flexibility and responsibility in determining how the primary remediation and enrichment instruction they provide helps students to fulfill or exceed the requirements of each *Common Core State Standard*.

Quest will seek to provide as much transparency as possible in what constitutes each standard and which curricular resources support each standard. Teachers, students and parents will have access to the level of curricular resources that they need, via the Quest intra/internet. Students will be empowered to use those resources to meet their needs at the moment that they have the need.

-3 Std Dev	- 2 SD	- 1 SD	+ 1 SD	+ 2 SD	+3 Std Dev

Instructional Results

Targeted for Remediation

Successful in the standard curriculum

Targeted for Extension
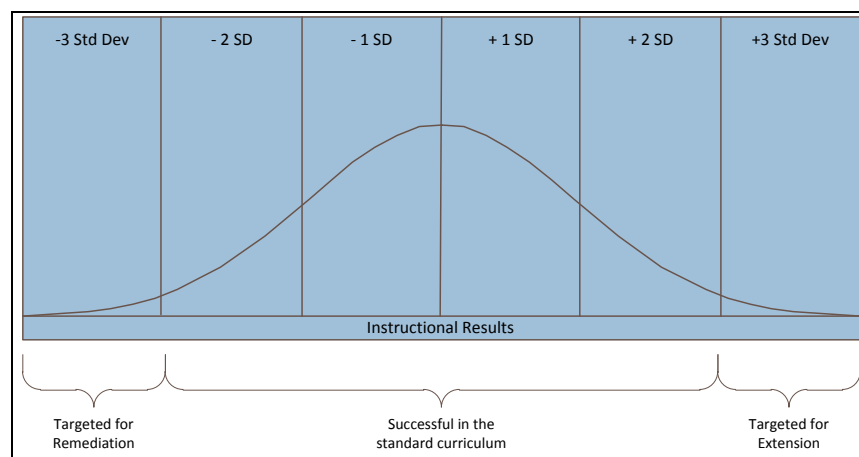
Figure 1. Illustrative Quest Instructional Spread.

In Figure 1, the standard deviation markers are illustrative of how students might perform when interacting with a given instructional standard. Capacity issues and priority around remediation and extension will determine the cutoffs for interventions. It is expected that Quest will likely experience student distributions similar to that of other practitioners of *Response to Intervention* (RTI) strategies.

Response to Intervention

Quest will implement a 3 tiered system of instruction. The Quest application of this strategy is unique in a blended learning model. The advantage of using this framework lays in our ability to look at data on a daily basis and to provide more frequent feedback and monitoring of student progress. Our framework will include:

- Tier 1, Universal Instruction — which will provide core academic and behavior support for all students and teachers. At Quest this instruction will be through our primary and secondary instructional platforms and project based learning (academics), Quest 101 - Boot Camp, student advisories, and asset building (behavioral).
- Tier 2, Targeted Instruction — providing supplementary support to Tier 1 instruction, through small group interventions and some individual interventions for students, scoring lower than the passing criteria, set by Quest, on the instructional platforms. This instruction may include additional tutor based instruction after school and remedial instructional workshops.
- Tier 3, Intensive Instruction — providing support through individualized interventions for students requiring additional supports, sometimes with interventions replacing the Tier 1 instruction.
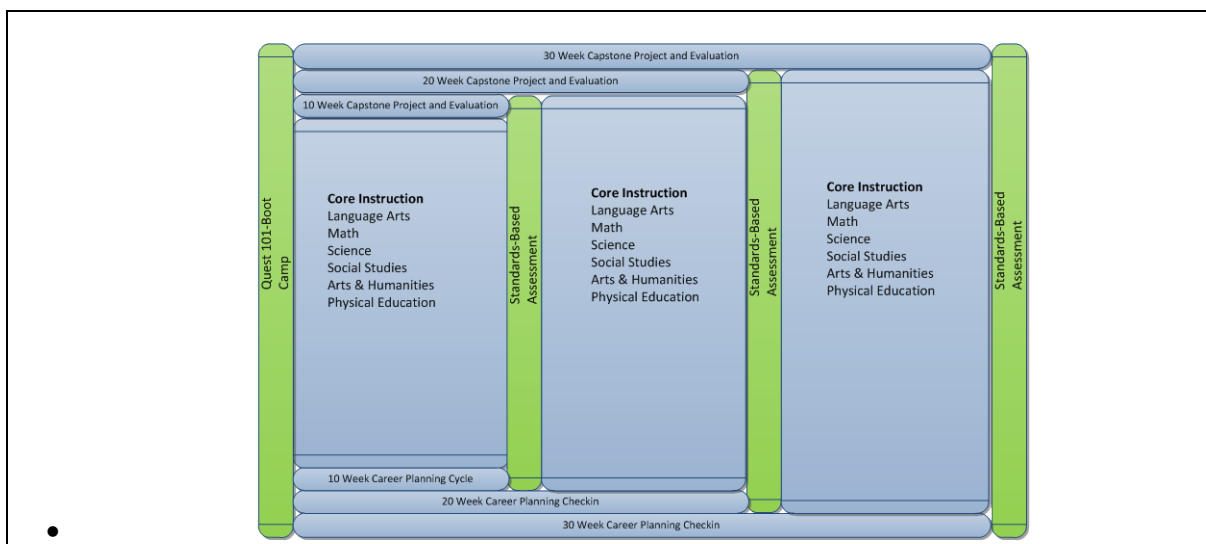

- **Figure 2. Quest Educational Map.**

Universal Instructional Programs

Figure 2 shows how Quest intends to organize instructional efforts. The primary instruction will be provided by the instructional platform. The instructional platform will also provide students, parents and staff with a consistent view of how each student is performing. The primary instructional platform that Quest selects will have a strong scope and sequence and should provide indicators that include academic as well as pacing performance.

This delivery component will allow each student to be aware of exactly which standards need to be mastered and whether or not they are on pace to complete those standards in the allotted time.

Since no single platform covers instructional standards completely, Quest will incorporate a secondary instructional platform that will use adaptive instruction. Layering platforms that use a strong scope and sequence and platforms that use adaptive instruction will provide a stronger mix of instructional motifs for students.

Research has shown that students who receive instruction via a single platform often plateau, after strong, initial gains. Using a secondary platform will allow the instructional staff to assign students to this additional resource, if and when they do plateau.

Students will spend their mornings working on core instruction, delivered through the instructional platform. The instructional path for each subject will be prescribed by the appropriate subject matter teacher. This learning will occur via several methods:

1. It will be delivered in a highly collaborative environment with teaching assistants on hand (Instructional Advisors)
2. Through direct instruction with small student teacher ratios
3. Through independent learning completed via the Internet

There will be a Curriculum Coach located in the collaborative space to assist students, subject area teachers and Instructional Advisors with leveraging the technology to best support students. The Coach will be a senior teacher who will act as the primary registrar for the instructional platforms. He or she will have will also have the primary responsibility of reviewing individual and aggregate student data, looking for trends or areas of concern.

Targeted Instructional Workshops

Throughout the day, short instructional workshops will be presented to remediate students in standards they did not master and to provide curricular extension to students who need to be challenged more. These workshops will be 50-55 minutes each and may deal with a single standard or a group of standards and may be for a single day or spread over two or even three days. Student data will be reviewed during the week by the Curriculum Coach and subject area teachers to determine the next week's schedule of workshops and which students should be scheduled into the upcoming workshops.

These face to face workshops will have a format similar to what is listed below:
- Students and teacher review the CCSS standard
- Teacher administers short, on-line, pre-assessment that corresponds to the workshop CCSS
- Students and teacher correct responses to assessment and clear up any lack of clarity in the assessment questions or how the instructional platform supports the CCSS standard
- Teacher delivers short 10 – 12 minute lesson, before letting students work on a group activity for 15 – 20 minutes
- Teacher delivers another short 10 – 12 minute lesson, based on student group work and getting students to use higher order thinking skills
- Teacher administers short, on-line, post-assessment that corresponds to workshop CCSS

Quest will record, store and catalog video of workshops, by standard, for use across the network. When workshops are scheduled, Quest will institute a standard practice of capturing these workshops for all students to
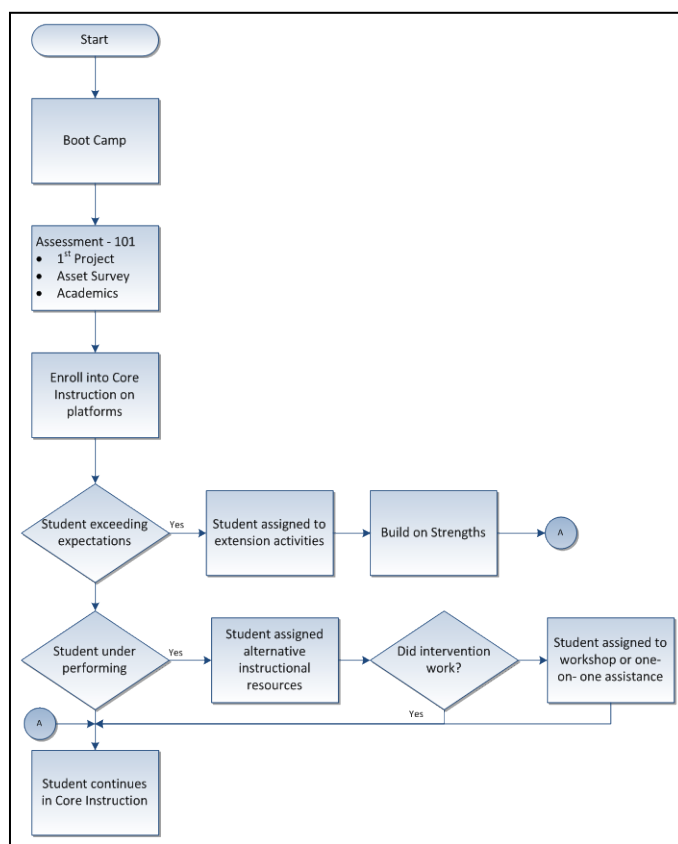

Figure 3. Instructional Flow.

access; as needed. Once recorded, the workshops will then be assessable, via our intranet, when students are seeking instructional resources to assist with their mastery of specific CCSS's. These recorded workshops will also be used as part of targeted interventions and assigned to students via Edmodo or an instructional Learning Management System.

Students will also have the opportunity to request a specific seminar, which might not have an obvious connection to the CCSS, via Edmodo. This request method will give an additional 'voice' to students and provide them with further self-direction of their own learning. This communication channel will also

allow Quest students who need extension activities to stay engaged, since some of the topical areas will originate from the student body, as a result of their own exploration.

Intensive Instruction

Quest will provide intensive, one-on-one instruction in math and reading after school, through purchased programing intended for small group and in one-on-one settings for students who have responded to the instructional platform or assigned workshops. This instruction will be aligned to what each student is receiving in their Universal Instruction and will help to support that instruction through multi-modal delivery of the same content areas. Instruction in this area may be also part of an IDEA service delivery plan for identified students.

Instructional Time

Quest will exceed the state of Wisconsin minimum 1,137 hours of instructional time for high school students. This will be accomplished by extending the school year into mid-June (see Table 2) and providing additional instruction during the summer months for identified students.

Date	Event	Activity
1st Week of August	Teachers Return to School	Review of previous year's data, Boot Camp data, and preparation for Summer Bridge
2nd Week of August	Summer Bridge Begins	Summer Bridge runs for 2 weeks
4th Week of August	PD and Planning Time	Review data from Boot Camp and Summer Bridge and prepare for new year
1st Week of September	School Starts	Students return
From October through May	Make-up & PD Days	1 day per month devoted to reviewing student work, students making up work and teacher PD and planning sessions
2nd Week of June	School Ends	Teachers start close out activities
3rd Week of June	Quest 101 - Boot Camp begins	Boot Camp runs for 2 weeks

Table 2. Instructional Year.

Project Based Learning

Students will have a block of time in the afternoon devoted to project base learning. Project based learning will assist students in tying together discreet knowledge and using that knowledge to develop higher order thinking skills. Projects will be designed to elicit student work that touches on a number of instructional areas and each project will include details as to how that project will address the CCSS.

Each project will also be used as an opportunity for students to demonstrate their mastery of a smaller percentage of the previous years' standards. This requirement will enable students to gain and maintain a greater sense of relevancy to previously learned material. Quest envisions implementing a project based learning environment that more closely aligns to that of solution-based learning or problem-based learning. Our implementation will focus not so much on the creation of physical projects, but on

the collection, manipulation and use of information in solving very real problems that students might be interested in.

Quest will use project focus areas to establish specialty academies in our school, such as: Sustainability, Organizational Quality, Social Responsibility, Community Development, Social Justice, Business Management, Non-Profit Management, Water Science, or Music Arts. Quest will incorporate feedback from the surrounding community into the decision regarding what 2 types of academies will be developed for our first school.

Project Based Focus

A central tenet of our approach to projects is that each project must have a high degree of relevancy to the student and produce an outcome intended to improve the community they live in, the community immediately surrounding the school, or the world community. Quest believes that this tenet will provide real world relevancy for our students so that each student sees the importance of what they are learning.

Projects will include the identification and incorporation of community assets in response to community needs. Projects will be designed by students, with staff guidance and coaching. Students will be taught how to ensure that their project designs cover the appropriate academic standards for each grade level.

These projects will be one method of gauging student ability to integrate facts into usable, applicable knowledge. Projects will be structured to encourage students to holistically apply knowledge, which often falls under separate academic standards, to real world problems. Projects should be challenging but not frustrating for students and allow them to demonstrate their mastery of higher order thinking skills by applying them to their academic studies.

Project Based Implementation

Quest will also use team projects to help students develop and build the collaborative skills that will become an asset to them in their pursuits beyond Quest. Part of the rubric for evaluating individual and team projects will be the level of innovation students demonstrate, when faced with obstacles to executing their project design, implementation, and even evaluation.

Grades 6 & 7	Grade 8	Grade 9	Grade 10	Grades 11 and 12
Type I Use clearly defined problem Use taught method. Solve correctly.	Type II Use clearly defined problem. Select method. Solve correctly.	Type III Use clearly defined problem. Choose from range of methods. Present range of answers.	Type IV Use clearly defined problem. Discover method. Create solution.	Type V Use ill-defined problem. Define problem. Discover method. Create solutions.

Table 3. Continuum of Problem Types.

Quest will use a variety of approaches, but the overall approach will seek to place as much control and work in the hands of students. Beginning in Boot Camp and throughout students' time at Quest, they

will be taught a variety of problem solving methods. Table 3 displays an adaptation of Howard Gardner's work that maps problem types. Quest adapted his work by assigning his classifications of problem types to Quest academic levels.

Generally, students in lower grades will be given more details regarding the constraints and goals and desired outcomes for projects they are assigned to. To keep teacher productivity high, Quest will expect students to provide much of the labor needed to plan, develop, document, present, and self-evaluate projects.

Teachers will teach the various project steps and then hold students accountable to do the work needed to execute the project. Holding students accountable for their work and supporting them in learning how to be accountable, through advisory and other socio-educational supports, is what will allow Quest to realize the benefits of a high productivity system.

Grades 6 & 7
All students will be given the same problem to solve and be expected to use the correct method to reach their set of solutions. Their approach to understanding the problem and their presentation materials and presentation will be as unique as each student or group. Beginning with grade 7, students may propose an alternative problem or project solution, if they can clearly support the alternative method as being valid.

Grade 8
Students can begin to select and modify clearly defined problem statements from various sources, which might include: P21 Lesson Starters or the Buck Institute for Education. Students will be expected to propose the problem solving methodology they will use. However, they will still be expected to provide sound viable solutions to the agreed upon problem or need.

Grade 9
Students will be expected to select or modify clearly defined problem statements from various sources, or propose a locally observed problem. Students will be expected to propose a range of methods to solve the problem statement and provide a range of solutions to the problem and present alternative solutions that have been assessed according to an agreed upon rubric.

Grade 10
Students will be expected to select or modify clearly defined problem statements from various sources, or propose a locally observed problem. Students will be expected to research and then propose a method of solving the problem statement and then create solutions to the problem and present solutions that have been assessed according to an agreed upon rubric.

Grades 11 & 12
Students will select 'fuzzy' or more loosely defined problem statements and clearly redefine them into succinct problem statements from various sources, or propose a locally observed problem. Students will be expected to research and then propose a method of solving the problem statement and then create

solutions to the problem and present solutions that have been assessed according to an agreed upon rubric. Problems and projects from The National Service Learning Clearing House may also be considered as viable projects to execute.

Integrating Project-Based Learning into Universal Instruction

Quest will integrate on-line learning, instructional workshops and project-based learning by ensuring that Quest develop a curricular perspective that clearly communicates the outcomes Quest intends each student to master by the time they graduate. The degree of self-direction expected, and the resulting project quality, at each grade will be part of our overall assessment of student success. In other words, Quest expects the project quality of our 6th graders to be that of an average 6th grader. However, Quest expects the project quality of our 12th graders to exceed that of most incoming college freshman. That is the trajectory that Quest will establish for our students.

From a curricular perspective, students in grades 6 & 7 will have a more focused set of measurable outcomes in the areas of English Language Arts and Math. Their projects will still require depth of thought, but there will be a strong focus on improving their fundamental skills through more focus on skills that can be demonstrated to show mastery in reading, writing and math computations.

Quest anticipates that students entering at 6th & 7th grades may be significantly below grade level and will need to have additional focused

instruction to catch up to their chronological grade. Project work will help to keep them engaged, while participation in Tier 2 instruction will help to bring them up to grade level.

Students in grades 8,9, & 10 will have much more freedom in designing their projects. However, the expectation will be that this work is robust in how it addresses standards and that this work clearly demonstrates the higher order thinking skills needed in today's world.

Juniors and seniors at Quest will be expected to demonstrate project quality that is approaching, if not exceeding, the level of work they will be expected to produce during their first year of college or as a valued employee of a growing organization.
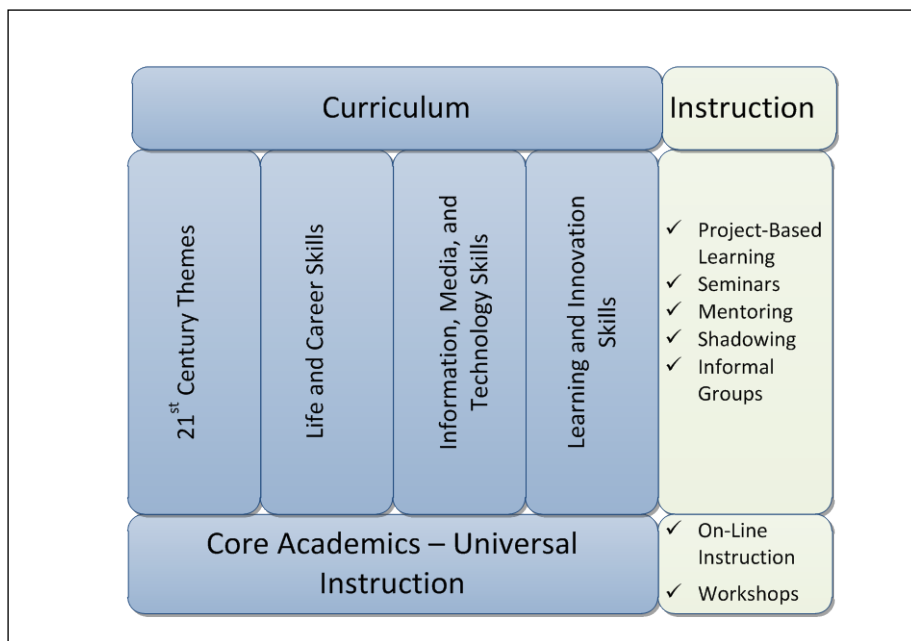
Figure 4. Instructional Integration.

Figure 4 shows how Quest intends to integrate the various educational elements into a cohesive whole. At this time, it is estimated that 60% of student time will be spent in Core Academics. The middle layer includes skills and themes that are part of the framework developed by the Collaborative for 21st Century Skills (P21). The P21 framework was recently adopted by DPI as part of the Wisconsin Employability Skills certification process. The skills are listed in Table 4

To present a concrete example of how this integration might be accomplished, Table 4 presents a modified lesson plan from the P21 Common Core Toolkit, with specific references to practices Quest will institute. Sample lesson starters from P21 and CCSS aligned scope and sequence, appear in Section 7.

8th Grade – Sample ELA Lesson

Sample Student Project Outcome: **Use information accurately and creatively for the issue or problem at hand.**

After completing the appropriate on-line unit that is part of the Core Curriculum and middle school requirement, students use *Edmodo* and *Google Docs* to brainstorm a list of significant social, emotional, or health issues teens face today. Working in groups, students research one issue and create a public service announcement on a closed YouTube channel (promoted through Edmodo and viewable only by students in the school) to persuade their peers about one action they should take regarding this issue. Students will select and use references from literary readings (e.g., citing how a particular novel presents the issue) as well as research from nonfiction sources to illustrate major points.

Common Core Standards	*P21 Skills Represented*
- RI.8.2. Determine a central idea of a text and analyze its development over the course of the text, including its relationship to supporting ideas; provide an objective summary of the text. - WHST.6-8.8. Gather relevant information from multiple print and digital sources, using search terms effectively; assess the credibility and accuracy of each source; and quote or paraphrase the data and conclusions of others while avoiding plagiarism and following a standard format for citation. - RST.6-8.7. Integrate quantitative or technical information expressed in words in a text with a version of that information expressed visually (e.g., in a flowchart, diagram, model, graph, or table).	- Information Literacy - Health Literacy - Media Literacy - ICT Literacy - Creativity - Critical Thinking - Collaboration - Communication

Table 4. Instructional Example.

Asset Building Approach

To support each student's aspirations and interests, Quest will incorporate an asset building approach intended to build on the strengths each student already possesses. With this approach, students are viewed as real people, having something to offer as opposed to a deficit that needs to be added to.

Students will be encouraged to discover, recognize, and celebrate their areas of strength. In this context, strengths are those characteristics that make each student an individual. When these strengths are recognized, student talents can flourish and grow. Quest will use an instrument like *Search Institute's Developmental Asset Inventories (DIA)* to help students recognize their existing assets and to identify areas that they can work on (see Attachment 'Y' for a listing of these assets).

The *DIA* is a proven instrument, which assesses the presence of 40 assets that help students avoid risky behaviors. The first application of the DIA will be during Quest 101. Data compiled from this on-line inventory will be shared with students privately. Individually and in the aggregate, this information will be used to help students recognize where they are already strong and what's needed to strengthen specific areas of opportunity. Skill building will be part of the Advisory curriculum and be assessed by a year-end application of the Asset Inventory.

Project assessments will also be used to measure the application of academic and non-academic skills and be used as another method of determining which strengths each student possesses and the areas that need to be strengthened. These skill assessments will be based on the Partnership for 21st Century Skills (P21) framework. Skills that this framework addresses are displayed in Table 5.

Partnership for 21st Century Skills
Critical Thinking and Problem Solving
Communication
Collaboration
Creativity and Innovation
Information Media and Technology Skills
Life and Career Skills Such As Adaptability and Flexibility
Initiative and Self-Direction
Social and Cross-Cultural Skills
Productivity and Accountability
Leadership and Responsibility

Table 5. The P21 Skill Set.

The approach of recognizing strengths and skills as assets will include a reflective planning activity during the Career Planning Cycle for each student. The level of rigor in this process will be grade appropriate, and documented on line via our e-portfolio process. Students will use information from their e-portfolio as part of determining their progress through multiple iterations of reflection and work.

Quest will develop or acquire a specific strengths based curriculum that can be taught through-out the school year through as part of student advisory meetings.

Educational Results

Local Measures

Quest intends to implement the following Local Measures to provide on-going assessment of student growth and evaluation and improvement of its instructional program.

Core Local Measures For All Years of School Operation:	Description of Outcome	Measurement or Assessment Form	Frequency of Measurement or Assessment	Students to Whom Measurement or Assessment Applies
1. Literacy	Grade-level literacy skills based on the Common Core State Standards	Computer-based, adaptive tests, based on the Common Core State Standards	End of unit, typically once per week or more, pre and post assessments for workshops	Grades 6-12
2. Mathematics	Grade-level math skills based on the Common Core State Standards	Computer-based, adaptive tests based on the Common Core State Standards	End of unit, typically once per week or more	Grades 6-12
3. Writing	Grade-level writing skills, using the 6+1 traits writing method	Computer-based, adaptive assessments and writing assessments that are part of projects	End of unit, typically once per week or more and as part of project submissions and presentations	Grades 6-12
4. IEP Goals	Teachers modify existing skill building to meet the needs of students	Teachers modify existing assessments to meet the needs of students	Every 6 to 10 weeks, as part of the Career Planning Cycle	Grades 6-12

Table 6. Local Measures.

Quest has identified additional Local Measures, listed below; that it believes will assist with student development, above and beyond the academic measures listed above.

Other Accountability Measures

Additional Local Measures Beginning in 2nd Year of School Operation:				
5. Employability Skills	Grade-level skills aligned with the Partnership for 21st Century Skills	Project and work sample driven assessments in areas of Critical Thinking, Collaboration, Creativity, Information Technology, Initiative, Life and Career Skills	Every 6 to 10 weeks, as part of the Career Planning Cycle	Grades 6-12
6. Skills related to Verbal and Artistic Expression	Grade-level skills aligned with the Partnership for 21st Century Skills	Project and work sample driven assessments in areas of: Communications, Social and Cross Cultural Skills	Every 6 to 10 weeks, as part of the Career Planning Cycle	Grades 6-12

7. Skills related to Civic participation	Grade-level skills aligned with the Partnership for 21st Century Skills	Project and work sample driven assessments in areas of: Productivity and Accountability, Leadership and Responsibility	Every 6 to 10 weeks, as part of the Career Planning Cycle	Grades 6-12
8. Post-Graduation Plan	College Readiness	Explore, Plan, and ACT Tests	Every 6 to 10 weeks, as part of the Career Planning Cycle	Grades 6-12
9. Post-Graduation Plan	Career Readiness, as defined by the Partnership for 21st Century Skills	Explore, Plan, ACT Tests, and assessments in the areas of: Life and Careers	Every 6 to 10 weeks, as part of the Career Planning Cycle	Grades 6-12

Table 7. Additional Measures.

Standardized Tests

Quest will use the *Explore, Plan, and ACT (EPAS)* system of standardized tests as part of our overall assessment and accountability system. Quest will administer the *EPAS* assessment suite in accordance with the requirements of the Milwaukee Charter School Review Committee (CSRC). Using the EPAS will allow Quest to ensure that students are on target to be college and career ready by graduation. These assessments will also allow Quest to ensure that each student receives the interventions they need, prior to starting the 11th grade. As stated earlier, our goal is a 21.5 ACT aggregate score for each student by graduation.

Quest will also administer the Northwest Evaluation Association – Measures of Academic Progress (NWEA – MAP) assessment, aligned to the Common Core State Standards, to all students 3 times per year. The MAP assessment is an adaptive assessment that provides each student with the opportunity for a more valid assessment of their skills, while reducing their frustration with questions that might be above or below their level of understanding. Once the results from the MAP are available, they will be shared with parents as part of student conferences and become part of the overall use of data at each school.

Quest will also administer the *Wisconsin Knowledge and Concepts Examination*, in 8th and 10th grades, in accordance with the guidelines provided by the state of Wisconsin and the CSRC. The results of which, along with the EPAS, will be reported to the CSRC and the Committee's designee (currently the Children's Research Center) by the Executive Director and the School Director.

Any unmet CSRC benchmarks will be reviewed and a corresponding corrective action plan will be developed in conjunction with reporting results to the CSRC. These action plans will be monitored and executed as part of the overall Quest continuous improvement processes (see Quest Business Plan for more details).

Additional Standards Based Assessments

Data driven instruction is an important aspect of the overall instructional program. It provides guidance to the instructional program. Quest will have data available from on-line instructional platforms.

Through the Quest integrated data platform, teachers will be able to pull data from multiple digital learning content providers. These data sources will allow Quest teachers to assess and provide daily feedback to students on their performance.

By assessing these data at the macro level, Quest will be able to assess the efficacy of the instructional platforms and their ability to help students meet the desired learning targets. Instructional workshops will also use shorter assessments that are also tied to CCSS. By using assessments, tied to standards, and ensuring that workshop curriculum aligns with those assessments; the instructional program is continually evaluated and adjusted.

Data will be extracted from the instructional platforms to help spot performance trends. Trends of concern might include:
- Standards covered by the instructional platform that might have a statistically significantly lower percentage of student mastery the first time attempted; and
- Workshops that have a low percentage of effective remediation – that is students can't consistently master the content as an outcome of participating in the workshop.

Data will be made available via a data dashboard that will summarize all the various data, at the student, grade level, student advisory, school, and network levels. Upon receiving its charter contract, Quest will begin the in depth work needed to determine the best mix of data to be displayed on its dashboard.

Qualifications of Teaching Staff

Quest teachers will meet the NCLB highly qualified teacher status. Teachers will be certified and preference will be given to teachers who are certified in the core subject areas they are intended to teach. All teachers and personnel who come in contact with students will have background checks conducted in accordance with the *Quest Personnel Policy and Procedures Handbook* and *Wisconsin Statute 118.19*.

Quest will not employ any teacher who has a felony conviction who might come in contact with students. Quest will, on a case-by-case basis; consider non-teaching employees with misdemeanor convictions for positions where the conviction does not place any student at risk.

Teacher licensing will be tracked via an accountability and compliance calendar. This on-line calendar system will allow Quest leadership to be appraised of all expiring certification dates, well in advance of those dates and to work with teachers to ensure that the appropriate licensing is maintained by each teacher.

Quest will consider employing a teacher with an emergency license if they have demonstrated subject matter knowledge in the needed academic area, but not in the grade range area. However, they must be able to demonstrate that they have a plan to obtain the needed license, within 3 years of obtaining their emergency license.

Admissions Procedures

Quest schools will be non-selective, open enrollment schools. The list of recruiting strategy is not intended to be exhaustive, but will include:

- Meetings and presentations to community groups in the area surrounding the schools
- Neighborhood walks in the area surrounding the schools
- Social media promotions
- Neighborhood newspapers
- The Milwaukee Journal-Sentinel
- The Milwaukee Community Journal
- Flyers in the area surrounding the school

Quest will promote the schools in a variety of ways to ensure that the school population reflects the community it is located in. By promoting the school to stakeholders surrounding the school, Quest hopes to have the school match the racial background of the surrounding area. Potential enrollees will be scheduled for information sessions and interested parties urged to enroll. Quest schools will be non-selective, and enrollee's names will be entered into a data-base, by the date of enrollment. Preferences will be given to sibling enrollments.

Should the enrollment list for any given grade exceed the available slots for that grade, Quest will hold a lottery to set the order and priority of enrollments for that grade. Students enrolled at Quest will be expected to attend Quest 101 – Student Boot Camp during the 3rd or 4th week of June. Continued enrollment at Quest is contingent upon Quest 101 attendance.

Quest will provide professional development to staff involved in the admissions process to ensure that Quest does not discriminate against students with disabilities. Quest will work with the families of students who have IEPs to ensure that Quest understands the accommodations that each student needs. This strategy may include pairing students with other students to assist with building an inclusive student culture.

Quest 101 – Student Boot Camp

Quest 101 is an intensive orientation prior to the start of each school year and will be required of all incoming students. The Boot Camp is part of the admission process and is designed to:

- Provide students with explicit information about how Quest intends to operate schools
- Set cultural & academic expectations
- Help students understand how learning will occur
- Give students a realistic preview of student life at Quest

Quest will ensure that each student understands how Quest is different from most schools they may have attended and that they will be challenged to work harder than they may have in the past. Quest will also let students know we believe that all students have the capacity to learn, when the work is aligned to their interests.

Through a series of presentations and discussions, Quest will orient students to current brain research (i.e., neuroscience, learning styles, and learning preferences). Quest believes there is room in our model for students to understand more about how their own brains work, so that they are most successful at learning.

Quest will then help students explore how to manage and maximize their learning while considering their learning styles and preferences, through on-line programs like *ST Math*. Students will begin to visualize their own mental learning model of successful learning when functioning as part of groups and individually.

Quest will integrate on-line learning, small-group instructional workshops and project-based learning. Quest will accomplish this by developing and sharing a curricular perspective that clearly communicates the outcomes Quest intends each student to master by the time they graduate

Students will be oriented to the processes Quest will use for project-based learning. As part of Quest 101, students will have the opportunity to produce their first project, as a part of a team. The entire project life-cycle will be used as a teaching opportunity for students to understand how projects will become part of their learning process at Quest. This activity will also be used as an opportunity for the teaching staff to learn about each student's background and their preferences.

Quest will also ensure that students know how to use of the learning tools employed by the school. These tools include, project based learning software like *Project Foundry*, an instructional platform like *e-2020™, Edmodo™, and PowerSchool™.* This learning activity will be an opportunity to reinforce the importance of becoming a self-directed learner and help each student visualize what a learning day feels like at a Quest school.

Academic assessments will be administered to help us build a base-line profile for each incoming student. The information will help Quest determine the type and the intensity of any interventions needed for new students as part of the Quest RTI framework. These interventions will be designed and scheduled, prior to the first day of school. This information will also assist staff in developing blended learning teams that can ensure that each student receives instruction geared toward their individual needs.

Students will be assigned to student advisories, which will meet twice per week. These advisories will play an important role in building the student culture of Quest. As part of advisories, it is important for students to understand how to give and receive feedback with each other. Students will have an opportunity to practice peer assessment and feedback processes in a low-risk environment, prior to the start of school. Peer to peer feedback will be important when advisory groups examine data that pertains to group performance (i.e., advisory aggregate attendance, grades, and discipline referrals).

Students will be responsible for authoring their first Individual Learning Plan (ILP). Quest will develop a standard format for these student developed plans. The ILP will include a discussion about their current achievement and their desired achievement trajectory. Under close adult support, students will then

produce their first ILP to be reviewed and completed with their parents or guardians. This activity will prepare them for their first Career Planning Check-in, which will occur towards the end of the camp sessions. Part of the curriculum for the Boot Camp appears at the end of the Education Section.

School Culture

Quest will design specific programming to use during Student Boot Camps that will, in part, be based on *The 7 Habits for Highly Effective Teens*, for the middle school students and *The 7 Habits of Highly Effective People*, for high school students, by Dr. Stephen Covey. These frameworks will assist Quest in developing a common language to use with students and to give them a standard to assess their own behavior against. Staff will receive professional development to help students internalize the concepts presented in order to develop and sustain systems to support the habits.

Student Advisories

The use of Student Advisories will also aide in the development of a strong, positive school culture. Student Advisories are groups of 17 – 21, same gendered students, who span multiple grades to discuss and problem solve issues that impact the academic progress of students. Usually, the group size is recommended to be less than 17 students to an advisor. Quest advisory groups may grow to a 22:1 ratio. To help offset the higher student to leader ratio; Quest will link its advisory members together through a social media platform.

The social media platform Quest will use is *Edmodo*, which is a platform specifically for schools. It allows students, teachers and parents to be linked together in on-line communities that are only assessable to school-related parties. These communities can then be used as a vehicle to enhance communications in and out of the school. Quest will create on-line communities that reflect the membership of each student advisory and ad-hoc project teams.

Advisory effectiveness will be measured through a set of metrics, intended to support the growth and health of each advisory. Advisory metrics used by other schools include: average monthly attendance, total tardy events during a month, cumulative GPA, and average ACT growth. Quest will develop a set of metrics that most complements the educational makeup of our schools and that helps to support continuous improvement of a strong school culture.

Matriculation and Summer Bridge

Matriculation at Quest will be based in part on the three grade-level groupings of:
- The 6th and 7th grade students
- The 8th through 10th grade students
- The 11th and 12th grade students

Students will be recommended for advancement from one grade grouping to the next, based upon the work they are doing, i.e. a student performing on a 6th grade level would not be recommended to advance, to the 8th through 10th grade grouping. Their level of competency will be determined by: their NWEA-MAP assessments, the level of the work they have mastered on the instructional platforms, and assessments of their project work.

If a student is not recommended for advancement, a parent may specifically request an advancement, based upon performance during the Summer Bridge program or work independently accomplished during the summer months. Quest reserves the right to re-enroll that student into a grade level that is more appropriate to the student's performance level.

The Summer Bridge program will be conducted for 3 weeks, beginning the 2nd week of August. Students will be required to attend, based on assessments performed during Boot Camp or an agreement to allow the student to advance, contingent upon attending the Summer Bridge program. Continued enrollment at Quest may be based on attendance in the summer bridge program.

The Summer Bridge program will consist of intensive iterations of assessment and instruction, aimed at strengthening student skills in reading and math. A variety of activities, in and out of school, will be used to engage students into the curriculum and give them a head start on the upcoming school year.

Early Warning System

Even with strong culture building components in place, there is a need to identify potential failure early. Quest will develop an early warning system to help us identify students in danger of not graduating. Research has shown that by monitoring attendance, behavior referrals, and course performance, schools can readily identify students who are at a high risk of not graduating. The early warning system will be part of the administration and teacher's dashboards.

Students who transfer into Quest will be automatically placed on a watch list for their first semester. Other students might be placed on this list as a response to any number of socio emotional indicators that might signal trouble. The School Counselor and Dean of students will collaborate with students, their parents and advisory representatives to ensure that suitable interventions are in place to help identified students improve performance, allowing them to be removed from the watch list.

Special attention will be given to students who struggle with Algebra I. Students who struggle with Algebra I are much more likely (80%) to drop out of school, while most students who pass this subject are much more likely to graduate (95%).

Students who are part of the Quest Early Warning System will receive more frequent Career Check Ins and their contact with supportive adults will be more frequent to ensure that the established interventions are effective. Entry and exit criteria for this warning system will be established prior to the first school opening.

Career Planning Cycles

Toward the end of each Career Planning cycle, students will have the opportunity to review their work and to compare their work products to their learning plan aims and goals. This activity will help students gain alignment between their student-developed aims and goals and their current progress and trajectory. If adjustments are needed, students will document those planned changes and, with approval, this reflection will become part of their amended ILP.

The Career Planning Cycle is meant to assist students in conceptualizing and then executing a mental model of success. Quest will introduce students to a number of change frameworks as they progress and develop which are appropriate for their developmental state. These frameworks will help students in viewing success as part of their fabric, as opposed to something that occurs separate from them.

Students will use asset mapping or relationship matrices to help them identify who their supports are at home, in school, and in their community. If they determine that they don't have the assets in these places to help them execute their learning plan, they will be encouraged and assisted in locating additional assets and supports.

Executing and reviewing their ILP will encourage students to view systems thinking on a more personal level. They will be able to see relevancy in how mental models help them to solve personal problems and challenges. Quest will consider using the materials and processes developed by WorkKeys as part this process. These standards based tools have proven to be effective for similar applications.

Disciplinary Procedures

A complete discussion of disciplinary procedures is included in the Quest Parent/Student Handbook. In general, students are considered to be subject to the authority of the school when they are en route to or from school and at school related or school sponsored events even though those activities may not take place on school grounds. Some examples include athletic meets and games, field trips, contests, and concerts. Misbehaviors, which occur at such events, will be subject to the same penalties as misbehaviors that occur on school grounds.

There are three behavioral levels and the consequence are not absolutes. All discipline is handled in a consistent, fair, and equal manner; however, every discipline situation is unique and many are complicated by violations between several levels, past consequence history, IEP requirements and other factors that must be considered in making a final determination of the discipline required.

Student Mobility

Student mobility is a very real concern for Quest. With so many factors causing mobility, Quest will use a variety of strategies to minimize the negative impact for students who are mobile and students who are impacted by mobile students, by:

- Creating "buddy systems" by partnering new students with current students in the same assigned advisory group
- Developing efficient student record-tracking systems to assist school administration in proactively obtaining school records from students' previous schools
- Providing outreach to educate parents about minimizing the negative effects of mobility
- Providing professional development to assist teachers and other staff in meeting the needs of highly mobile students

As part of our reporting requirement to the CSRC, Quest will track student retention and mobility, and assess the efficacy of the above-mentioned initiatives. The strength of the school culture will have an

impact on these metrics and will help to drive improvements in how Quest address and strengthen the culture.

Planning for Graduation

Quest will use information gathered from standardized tests, assessments of non-academic learning, and observations conducted during the social interactions of students via advisory and other opportunities to align student thinking with the expectation that they can and will graduate. Much of the alignment activity will occur during the Career Planning activities.

The expectation will be shared with parents that the initial ILP each year will be completed in collaboration between parents or guardians, students and their advisory representative. Parents and guardians must play a major role in this activity and will be offered the opportunity to attend informational and instructional sessions on how to support their student in completing their ILP

The Career Planning Cycle periodic meetings are intended to facilitate students, parents and guardians, and Quest staff in revisiting each student's Individual Learning Plan (ILP) – These plans will incorporate a framework of:

- Assessing current strengths and building on those strengths,
- Assessing current and past academic performance to project future performance, and
- Assessing current and past non-academic performance and planning for future performance.

Quest will schedule Career Planning sessions for each student every 6 – 10 weeks, depending on student needs. For students who enroll in Quest as 6th graders, there will be a minimum of 21 sessions during their 7 years of attendance. During these sessions, information gathered during the Boot Camp gathered analyzed with the goal of understanding each student's trajectory toward meeting their career and college readiness goals, which should include at a minimum graduating from high school.

The format will include students revisiting their initial goals and then comparing their current performance to those goals and then collaborating with their parents or guardians and their advisory leader to set new goals, in each of the framework elements.

At the mid-point of the 10th grade year, the levels of non-academic performance (self-discipline, accountability, etc.) that Quest will expect students to display will be aligned with the success factors that are seen as necessary for successful college freshman. The context that Quest will use to help measure college readiness will include the following areas and methods of assessment:

- Key Cognitive Strategies – Through assessments of the substance and quality of project work
- Key Content Knowledge – Through EPAS and assessments of on-line work quality
- Academic Behaviors – Through self and advisory assessments of consistent work habits
- Contextual Skills and Awareness – Through assessment of Knowledge about the college application process

Quest intends to hire a 2nd Student Counselor position prior to its first cohort reaching the 11th grade. This second counseling position will focus on college and career preparation. He or she will assist students with searching for and identifying their best college and career options.

Additionally, Quest will seek to partner with area *TRIO* programs to have their representatives speak to and possibly recruit Quest students to become involved with their programs. Quest will seek to do the same with various Youth service organizations for college bound and non-college bound students, to give as many students as possible the opportunity to practice learned skills in an expanded context.

Additionally, students will be encouraged to accelerate their studies by making high school subjects available to students during their 8th grade year and by making college and Advanced Placement (AP) classes available to students during their 11th and 12th grade years. Studies have shown that graduation percentages increase for students who have access to a rigorous curriculum. Quest has budgeted funding for each senior to take 4 AP exams or to dual-enroll in 4 freshman-level courses at *Milwaukee Area Technical College.*

Time blocks set aside for project work for grades 6 through 10, will be reallocated for juniors and seniors to use in part to research their career choice and to locate the best colleges for those career choices. The work in this area will be conducted under the same project management framework that will be used for their project-based learning. The application, acceptance, enrollment, and scholarship processes will be some of the culminating activities for their project work at Quest.

For students who choose not to go to college, these time blocks will be used for job shadowing, interning and other career exploration activities. These students will be well prepared to participate in the workplace, with 21st century skills that will be valued by employers. A framework, under consideration, for evaluating internship performance appears in Attachment 'Y'. This framework is aligned with P21 standards.

Design and Delivery of Professional Learning

To support all of the systems that Quest will develop or implement, Quest will ensure that staff receives well-conceived professional development (PD). There will be PD provided to support all aspects of the operations, including project based learning, the instructional platform and the student project management software.

Additional professional development for Quest staff members will be planned according to systemic needs determined by the Instruction and Curriculum Team. On-going professional learning needs will also be derived from analysis of student data, teacher performance data, and change initiatives that Quest sees as common amongst its schools and the Center of Support (CoS).

The use of blended learning and project-based learning will require a high level of collaboration between all teachers for the benefit of each student. Teachers will require on-going in-service PD and coaching to support this change in roles. Quest will consider using an evaluation framework and an on-

line PD provider similar to Teachscape. As a blended learning school, Quest feels this approach will support our teaching and support staff.

The Role of the Teacher

At Quest, the role of the teacher will differ dramatically from that of the typical teacher in K-12 schools. The role shifts toward using more of the practices which facilitate the acquisition of higher order thinking skills. This shift is facilitated by allowing technology to be the primary conduit for instructional content aligned to lower order thinking skills, i.e. drill and practice and recitation of facts and figures. Quest will need to recruit, hire and support teachers who see themselves as 'connected teachers'. The difference Quest sees in the teacher's role is contrasted in Table 8.

Additional professional development will be determined upon the analysis of assessment data and assessing overall student needs. Improvement teams, described later in this document, will also provide data that will drive professional learning for staff that work more directly with the CoS.

Traditional Teacher	Quest Connected Teacher
Teacher seen as the Sage on the Stage	Teacher sees themselves as a guide, advisor or coach to students
Teacher feels the need to control student behavior	Teacher sees student behavior as an opportunity
Teacher 'sees' student deficits as something to be added to that will bring students up to level	Student are seen as possessing a set of assets and teachers see their job as guiding students through a discovery process that strengthens those assets
Teachers spend most of their effort (labor) imparting facts to students, working at the lower levels of learning	Teachers spend most of their time assisting students at the tasks of tying information together through activities aimed at higher order thinking skills
Teachers grade most student homework and assign grades	Teachers monitor the instructional platform to ensure that all students are showing progress. Most grading and feedback occurs on-line
Teachers assign students to remediation after 1st or 2nd quarter of school	Teachers assign students to remediation after no more than a week of below par performance
Teachers assign students to enrichment activities as time allows	Teachers assign students to enrichment activities after no more than a week of near maximum performance
Teachers provide information to all students, regardless of their needs	Teachers personalize information through a social media platform and through personal interactions, according to each students needs

<div align="center">Table 8. The Quest Connected Teacher.</div>

Teacher Evaluations

Our teacher evaluation process will involve on-going observations and coaching, and professional learning targeted to teacher's needs. As part of the teacher contracting process, each teacher will have a performance review that will include self-reflections on their performance and the administration's perceptions of their performance, based on observations. The framework Quest will use for evaluations will be built on the work of Charlotte Danielson (see Table 9) and has been adopted by Teachscape as part of their Teachscape Walk evaluation process.

Teachers will then develop a learning plan that is similar in philosophy to the ILP developed by students. Their on-going performance in support of the overall Quest Instructional Goals, will inform their evaluations. Based on their evaluations, and their learning plan, PD goals for the year will established. These goals will make up roughly 1/3rd of their on-going PD.

Capturing video of our instructional workshops will allow each of our School Directors to conduct more frequent observations of small group instruction without entering the classroom. If the observed instruction warrants an in person visit, the Director will be expected to conduct that visit. Quest teachers will also be expected to assist students with on-the-spot assistance in one-on-one situations. The School Director will ensure that at least one observation is done in this setting.

	Unsatisfactory	Basic	Proficient	Distinguished
1a: Demonstrating Knowledge of Content and Pedagogy	In planning and practice, teacher makes content errors or does not correct errors made by students. Teacher's plans and practice display little understanding of prerequisite relationships important to student learning of the content. Teacher displays little or no understanding of the range of pedagogical approaches suitable to student learning of the content.	Teacher is familiar with the important concepts in the discipline but displays lack of awareness of how these concepts relate to one another. Teacher's plans and practice indicate some awareness of prerequisite relationships, although such knowledge may be inaccurate or incomplete. Teacher's plans and practice reflect a limited range of pedagogical approaches to the discipline or to the students.	Teacher displays solid knowledge of the important concepts in the discipline and how these relate to one another. Teacher's plans and practice reflect accurate understanding of prerequisite relationships among topics and concepts. Teacher's plans and practice reflect familiarity with a wide range of effective pedagogical approaches in the discipline.	Teacher displays extensive knowledge of the important concepts in the discipline and how these relate both to one another and to other disciplines. Teacher's plans and practice reflect understanding of prerequisite relationships among topics and concepts and a link to necessary cognitive structures by students to ensure understanding. Teacher's plans and practice reflect familiarity with a wide range of effective pedagogical approaches in the discipline, anticipating student misconceptions.
Critical Attributes	• Teacher makes content errors. • Teacher does not consider prerequisite relationships when planning. • Teacher 's plans use inappropriate strategies for the discipline	• Teacher is familiar with the discipline but does not see conceptual relationships. • Teacher's knowledge of prerequisite relationships is inaccurate or incomplete. • Lesson and unit plans use limited instructional strategies and some are not be suitable to the content.	• The teacher can identify important concepts of the discipline, and their relationships to one another. • The teacher consistently provides clear explanations of the content. • The teacher answers student questions accurately and provides feedback that furthers their learning. • The teacher seeks out content- related professional development.	• In addition to the characteristics of • "proficient," • Teacher cites intra- and inter- disciplinary content relationships. • Teacher is proactive in uncovering student misconceptions and addressing them before proceeding.
Possible Examples	• The teacher says, "The official language of Brazil is Spanish, just like other	• The teacher plans lessons on area and perimeter independently of one	• The teacher's plan for area and perimeter invites students to	• In a unit on 19th century literature, the teacher incorporates information

	South American countries." • The teacher says, "I don't understand why the math book has decimals in the same unit as fractions." • The teacher has students copy dictionary definitions each week to help his students learn to spell	another, without linking the concepts together. • The teacher plans to forge ahead with a lesson on addition with re-grouping, even though some students have not fully grasped place value. • The teacher always plans the same routine to study spelling: pre-test on	determine the shape that will yield the largest area for a given perimeter. • The teacher realized her students are not sure how to use a compass, so she plans to practice that before introducing the activity on angle measurement. • The teacher plans to expand a unit	about the history of the same period. • Before beginning a unit on the solar system, the teacher surveys the class on their beliefs as to why it is hotter in the summer than in the winter.

Table 9. Evaluation Rubric Excerpt.

Teacher Mobility

As one of our overarching goals, Quest will strive to reach a 90% teacher retention rate. Understanding that this goal may be a challenge during our ramp up phase, we have set this goal to become effective after our 5th year of operation. However, teacher mobility is and will be an area of concern for Quest. To help us reach this goal Quest has a number of incentives that will be instituted.

The Quest model has the potential to provide greater teacher satisfaction in the long run. Teachers will have less work to do on the lower rungs of Blooms Taxonomy, which is concerned with memorization and drill and practice. The majority of their work will involve Bloom's higher order skills. Quest believes that the shift in paradigm to the 'Connected Teacher' will allow those in the teacher profession to focus on the more intrinsically rewarding elements of teaching and be an important factor in teacher mobility.

Professional Learning and School Culture

Prior to each school opening, additional professional development will be provided to ensure that each teacher is equipped to work as part of a collaborative team that supports student centered learning. The professional development will include such topics as working in a team environment, socio-emotional learning, and self-directed learning strategies.

After each school has been in operation, a large portion of the professional development will result from analyses by the Discipline and School Culture Team. Through continually assessing culture and monitoring the effectiveness of programming and communications, this team will be positioned to provide recommendations for professional development as well as provide some direct developmental opportunities for staff members through peer coaching.

Evaluating Programs

Programs will all be assessed against the most important metric, student achievement. The use of data throughout Quest will enable all evaluations to be data driven. Quest will use of live data to assist with the evaluation and improvement of programs and collect additional data where needed.

Program evaluation will also be the responsibility of the Data Driven Instruction and Curriculum Team. By design, on-going evaluation will part of the Quest culture. Teams will review all aspects of Quest operations, including non-academic functions to ensure that they are adding to the mission and improving academic operational effectiveness.

The CoS will be responsible to ensure that all data required by the Charter School Review Committee or the Children's Research Center is provided in the manner and time required. The Executive Director is ultimately responsible for the operations of the CoS.

Plan to Educate Children with Disabilities

Quest-Milwaukee will comply with all applicable state laws, the Individuals with Disabilities Education Act (IDEA & IDEA-97), the Family Educational Rights and Privacy Act (FERPA), and section 504 of the Rehabilitation Act of 1973. More detail on how Quest will do this is included in Attachment 'W'.

Services will be provided with consideration to the Wisconsin Department of Public Instructions, 'Model 2r Charter School Special Education Policies and Procedures', November 2008, Amended July 2011. Quest has met with a representative from the Independent Charter School Collaborative of Wisconsin to begin developing a consultation relationship.

Quest also intends to seek psychological and speech and language services through a contractual arrangement with a local or national provider.

Quest is committed to a program of responsible inclusion for students with special needs. Staff will work with identified students for intensive, short-term "pull-asides," returning them to subject area activities with support materials, plans, and follow-up. The special education teacher will also provide strategic direct instruction for some individual students in one-to-one and in small groups within a resource setting, as determined by the IEP Team.

Additionally, the special education teacher will provide subject area teachers with strategic modeling, materials, curricular adaptations and follow-up that elaborates on instruction and practice for identified students, through co-planning and co-teaching. He or she will regularly review each student's level of service and adjusts it to meet his or her academic and social learning needs. The school will use appropriate IEP procedures for making referrals, conducting evaluations, communicating with families, writing and reviewing IEPs, maintaining student records, and reporting to federal and state authorities.

SECTION III: CERTIFICATION

Charter schools must abide by the following provisions of state law and the policy of the City of Milwaukee (open records for contractors with city, background checks). Please read the following list carefully. Initial each section of the list to certify that you understand these requirements and that the school will honor them. Please sign and date the certification in the space provided and return this section with your application. (Attachment R)

I certify that the school named in this application will not charge tuition to charter students. (Schools may charge tuition for students not eligible for charter status. Charter schools may accept students under other programs such as the Milwaukee Parental Choice Program. However, schools may not receive tuition payments for the same students from more than one program. Schools may also charge reasonable fees for such items as field trips or extracurricular activities.)

I certify that the school named in this application will abide by statutory eligibility requirements in determining who is a charter student. State statutes provide that students must meet the following tests: the student is a city resident.

I certify that the school named in this application will administer required state examinations. (State law requires charter schools to administer the state's examinations for fourth, eighth and tenth graders.)

I certify that the school named in this application is or will be nonsectarian.

I certify that the school named in this application will not discriminate in its admission policies or deny participation in any program or activity on the basis of a person's sex, race, religion, national origin, ancestry, pregnancy, marital or parental status, sexual orientation, or physical, mental, emotional or learning disability.

I certify that the school named in this application serves at-risk students or, if it does not now serve at-risk students, will serve at-risk students who apply and meet other admission requirements. (State statutes define at-risk students to include students in grades 5 - 12 who are one or more years behind their age group in the number of high school credits attained, or two or more years behind their age group in basic skills levels, and who are also one or more of the following: dropouts, habitual truants, parents or adjudicated delinquents.)

I certify that the school named in this application will abide by health and safety codes that apply to public schools, including immunization requirements.

I certify that the school named in this application is located in the City of Milwaukee.

Certification, continued

ER   I certify that the applicant is not a for-profit entity.

ER   I certify that the school named in this application will abide by city requirements for access to records of a contractor with the city.

ER   I certify that the school named in this application has conducted criminal background checks on current employees and volunteers and will conduct criminal background checks on all new employees, and that the school will assign only those employees and volunteers who, in the judgment of the school have nothing in their background, including but not limited to pending charges or convictions of criminal offenses, which would render them unfit to work or otherwise have contact with the school's students and employees.

ER   I certify that the school named in this application will submit information required by contract, including an annual financial audit, to the sponsor by the date established in the contract.

ER   I certify that I understand that the award of a charter school contract is contingent meeting benchmarks identified in the charter school contract.

ER   I certify that the school named in this application will comply with federal regulations that apply to charter schools authorized by the City of Milwaukee, including, but not limited to, the provisions in the *No Child Left Behind Act* that apply to schools in need of improvement (The 2001 passage of the Elementary and Secondary Education Act, also known as *No Child Left Behind*, contains significant sanctions for schools that do not meet its requirements; charter schools are required to comply with its provisions. For guidance from the US Department of Education, please see Charter School Policy Guidance for NCLB.)

ER   I certify that the school named in this application will comply with the requirements of the CSRC regarding tasks required by the academic monitoring and operations monitoring consultants and any additional monitoring requirements that the CSRC develops as needed during the lifetime of the school's contract with the City of Milwaukee.

I hereby certify that I agree to abide by the requirements above and understand that failure to do so may result in revocation of the charter.

Edgar T. Russell, Jr.   _E ___ Russell_
Applicant Legal Name   Applicant Signature

_1/6/2012_
Date

Quest Leadership

Board of Directors

Dr. Robert M. Davis– Board Chair

Robert Davis is the President & CEO of the Zoological Society of Milwaukee. He has been in this position since January 1, 2006. He came to the Zoological Society in July 2005 as the Chief Operating Officer. As President & CEO, Dr. Davis leads all operational aspects of the Zoological Society. This position oversees management of a full-time staff of 53, a part-time staff of 12, 20+ interns and a volunteer organization of 557 members and a general membership of 53,000 households.

As President & CEO, Dr. Davis concentrates on fundraising, strategic and business planning as it helps to shape the future of the ZSM and its relationship with the Milwaukee County Zoo. He also is involved in community development and diversity issues. Dr. Davis will lead the Society in supporting the Milwaukee County Zoo to brand itself as a local and national treasure through identification and enhancement of the overall image and awareness of the Zoo.

Prior to serving the ZSM, Dr. Davis was the administrative head of Education at the Lincoln Park Zoo, Dr. Davis was responsible for more than 15 program areas, with more than 25 ongoing projects and programs. In this role he provided visionary leadership to the Education department overseeing all functions of the department working in collaboration with other scientific, academic and conservation organizations such as the World Wildlife Fund, United States Fish and Wildlife Service, the Metro Chicago Boys and Girls Clubs, the Chicago Board of Education, Brookfield Zoo, DuSable Museum, Shedd Aquarium and several local colleges.

Dr. Davis has been active on numerous boards and committees. He was most recently appointed to the Board of CEO leadership Academy which is a public Charter School under the jurisdiction of the City of Milwaukee's Common Council. He is the Board Member of Quest Milwaukee, a not-for-profit organization located in the Center for Transformational Learning at Marquette University and he served on the Board of Directors of The Milwaukee Area Technical College (MATC) from 2007 - 2010. Dr. Davis is on the Independence First Board of Directors and he recently joined the Milwaukee Film Board.

Dr. Davis also serves as the Past Chair of the Diversity Committee of the American Zoo and Aquarium Association (AZA). He was honored in 2008 by the Association of Zoos and Aquariums as a recipient of the AZA Outstanding Service Award for his role as the Chairperson of the Diversity Committee from 2004-2007. He also serves as an Advisor to the AZA Conservation Education Committee and is a founding member of the AZA Trends Committee. Dr. Davis is the past president of the Chicago Tuskegee University Alumni Club and was the chairperson of the National Alumni Association Biennial Convention in 2002 in Chicago, Illinois. He is also on several committees with the American Association of Museums,

the National Science Foundation, the Association of Science and Technology Centers, the National Science Teachers Association, the American Association for the Advancement of Science and more.

Dr. Davis holds a degree in Veterinary Medicine from Tuskegee University and Bachelor of Science, in Animal and Poultry Sciences, Tuskegee Institute (University).

Howard Fuller, Ph.D. –Board Member

Howard Fuller's career includes many years in both public service positions and the field of education. Dr. Fuller is a Distinguished Professor of Education, and Founder/Director of the Institute for the Transformation of Learning at Marquette University in Milwaukee, Wisconsin. The mission of the Institute is to support exemplary education options that transform learning for children, while empowering families, particularly low-income families, to choose the best options for their children.

Immediately before his appointment at Marquette University, Dr. Fuller served as the Superintendent of Milwaukee Public Schools June 1991 - June 1995. Dr. Fuller became nationally known for his unending support for fundamental educational reform.

His prior positions included: Director of the Milwaukee County Department of Health and Human Services 1988 -1991; Dean of General Education at the Milwaukee Area Technical College 1986 - 1988; Secretary of the Wisconsin Department of Employment Relations 1983 - 1986; and Associate Director of the Educational Opportunity Program at Marquette University 1979 - 1983. He was also A Senior Fellow with the Annenberg Institute for School Reform at Brown University 1995 - 1997.

Dr. Fuller received his B.S. degree in Sociology from Carroll College in Waukesha, Wisconsin, in 1962; M.S.A. degree in Social Administration from Western Reserve University in Cleveland, Ohio, in 1964, and his Ph.D. in Sociological Foundations of Education from Marquette University, Milwaukee, Wisconsin in 1986.

He has received numerous awards and recognition over the years, including four Honorary Doctorate Degrees: Doctorate of Humane Letters from Carroll College in 1987; Doctorate of Laws from Marian College, Fond Du Lac, Wisconsin in 1992; Doctorate of Business and Economics from Milwaukee School of Engineering in 1995. Doctorate of Humane Letters from Edgewood College, Edgewood College, Madison WI.

He is the Chair of the Board of: CEO Leadership Academy and Quest Milwaukee. He also serves on the Board of the Black Alliance for Educational Options, Partners for Developing Futures and Milwaukee Charter School Advocates. He is an Advisory Board member of the Big Picture Company and the National Association for Charter School Authorizers.

DEBORAH M. McGRIFF, Ph.D.

3290 N. 44th Street
Milwaukee, WI 53216
Phone: 617.999.6592
Fax: 414.449.2507
dmcgriff@newschools.org

EDUCATION

1985	Doctor of Philosophy in Administration, Policy and Urban Education
	Fordham University, New York, NY.
1975	Master of Science in Education
	Queens College, City University of New York, Queens, NY.
1970	Bachelor of Science in Education
	Norfolk State University, Norfolk, VA.

ADMINISTRATIVE AND TEACHING EXPERIENCE

8/08 – Present   ***Partner*, NewSchools Venture Fund**, Boston, MA.

Provide investment strategy, quality teaching, and management assistance to the firm's portfolio ventures.

1993 – 7/08   **Edison Schools**, New York, NY.

Executive Vice President, Chief Relationship Manager

Executive Vice President, Chief Communications Officer

President, Edison Teachers College

Executive Vice President, Charter School Development

Senior Vice President, Public School Partnerships

Executive Vice President, Chief Relationship Manager

Provided generative leadership on non-profit boards important to the parental choice movement, and thought leadership for school reform innovations.

Executive Vice President, Chief Communications Officer

Reengineered internal and external communication to improve the company's brand and reputation. Identified governmental relations priorities.

President, Edison Teachers College

Prepared a business plan with a sustainable and scalable business model. Identified potential partners and initiated a venture capital campaign.

Executive Vice President, Charter School Development

Expanded the company's charter school channel. Established partnerships with prominent non-profit organizations and networked with national charter school associations to improve the legal and regulatory environments for charter schools.

Senior Vice President, Public School Partnerships

Secured the first, the most profitable and the most sustainable Edison partnerships. Provided leadership for the Midwest Region development team. Lead prospecting in large urban school districts. Served as an information resource for the media, educational reform organizations and governmental agencies.

1991 – 1993 **General Superintendent, Detroit Public School System,** Detroit, MI.

Provided leadership for approximately 20,000 employees, 175,000 pre-kindergarten through twelfth grade students, 16,000 adult education students, and a budget of $1.2 billion. Breathed new life into the schools through a direct, ambitious, and impressive mission: To make the Detroit Public Schools the first large urban school district to successfully educate all of its students. The path to this mission was found in the strategic plan, Design for Excellence, which featured four goals: transforming all schools into schools of the future, ensuring management and organizational effectiveness, guaranteeing student success, and building community confidence. Raised student test scores, reduced the dropout rate, opened numerous choice schools, expanded principal accountability, and promoted diversity. Named Newsmaker of the Year for 1992 by *Crain's Detroit Business,* a weekly publication of the business community.

1988 – 1991 **Milwaukee Public School System**, Milwaukee, WI.

1989 – 1991 ***Deputy Superintendent***

1988 – 1988 **Executive Assistant to Superintendent**

<u>Deputy Superintendent</u>

Served as the chief school officer in the absence of the Superintendent. Provided leadership for educational programs, instructional technology, student services, affirmative action, human relations, school safety, community relations, school restructuring and student assignment. Supervised the day-to-day operations of the school district and assisted directly in all functions of the Superintendent. Duties also included the development and implementation of Board and Administrative policies; facilitating the Superintendent's executive agenda, including budget preparation and oversight, labor relations, public affairs, personnel administration and school operations.

<u>**Executive Assistant to Superintendent**</u>

Provided leadership for the Superintendent's reorganization of the school district. Assisted the Superintendent in building a foundation of support for excellence and equity throughout the system among Milwaukee Public Schools' employees and the district's external constituencies. Collaborated with foundations, educational research centers, regional laboratories, universities, etc. to expand financial resources and technical assistance. Contributed to the decision-making process by collecting and analyzing qualitative and quantitative data on programs, processes, and structures of the school district.

1986 – 1988   **Assistant Superintendent for Curriculum and Instruction,**

                             Cambridge Public Schools, Cambridge, MA.

Provided leadership for K-12 curriculum development, revision and implementation in all subject areas. Administered the preservice education, staff development, research and discretionary grants programs. Integrated bilingual, special and regular education programs into comprehensive school improvement efforts. Augmented human and financial resources by establishing bridges among schools, businesses and universities. Enhanced teacher empowerment through expanded roles, mini grants, and recognition programs. Assisted the Superintendent with collective bargaining, budget development, personnel management and strategic planning.

1985 – 1986   **Project Manager, Center for Educational Leadership**, New York, NY.

Directed the development, implementation and evaluation of the comprehensive staff development program for Project Basics, a citywide mayor's initiative to improve the basic skills of high-risk junior and senior high school students attending low performing schools under state review. Identified, planned and implemented the leadership workshops, seminars, consulting services, work groups, site visits, and institutes for the center.

1981 – 1985   **New York City Public Schools, Community School District 13**, Brooklyn, NY.

1983-1985   **Executive Assistant to the Superintendent for Junior High School**

                             Instructional Program Development

1981-1983   **Director of Superintendent's Special Projects**

<u>**Executive Assistant to the Superintendent for Junior High School Instructional Program Development**</u>

Organized and administered multiple small schools in each junior high school. The Ronald Edmonds Learning Center, with technology, performing arts, and media schools within the center, has been recognized as an effective school by local and state organizations. Redesigned the articulation process into and from junior high school doubling the number of students accepted by the specialized high schools. Improved mathematics, reading and writing performance. Initiated partnerships such as the Columbia University Writing Process Project.

Focused the use of New York State Textbook Law funds. Designed and administered the Special Education Prevention Program.

<u>Director of Superintendent's Special Projects</u>

Designed and supervised the Comprehensive Reading/Language Arts Program that resulted in student performance above the national average. Administered school improvement projects such as the Local School Development Project. Initiated and administered the WEDGE Writing Program and conducted district-wide and citywide staff development. Designed the junior high school instructional monitoring system. Conducted staff development for prospective administrators.

1983 – 1986   **Adjunct Faculty Member, The College of New Rochelle,**

           New Rochelle, NY.

Designed and implemented a reading course for prospective college students and a writing course for first year students.

1979 – 1981   **Teacher Corps Team Leader of Preservice and Inservice Education, New York University Teacher Corps Project,** New York, NY.

Retained 75 percent of the teacher interns as teachers in two of the three project schools. Planned the staff development program for the Teaching/Learning Center. Organized Teacher Resource Centers in two project schools. Initiated and implemented a parent education program.

1976 – 1979   **Coordinator of the ESAA High Intensity Reading Program,**

           New York City Public Schools, Public School 305, Brooklyn, NY.

Integrated the High Intensity Reading Program with the classroom programs of gifted, average, and remedial students. Chaired the school curriculum committee.

1970 – 1979   **Elementary Classroom Teacher and Grade 7 Reading Intern, New York City Public Schools, Community School District 13,**

           Brooklyn, NY.

Promoted collegiality through the position of grade leader. Exceeded expected outcomes for gifted and high-risk classes. Implemented pilot programs. Prepared students for transition from elementary to junior high school.

EDGAR T. RUSSELL

4266 North 90th Court   Cell Phone: (414) 719-0316
Milwaukee, WI 53222   edgarrussell@hotmail.com

QUALIFICATIONS

> 21 + years of experience in operations mgt. and organizational development
> 19 + years of experience in training development and management

PROFESSIONAL ACCOMPLISHMENTS

Education Management

- Developed educational approach and business plan for a network of high-productivity charter schools using blended and project-based learning
- Led staff of educators, counselors and professional development staff who provided consistently high quality educational services to over 100 private schools

Operations Management

- Managed over $10M in P&Ls for a 4 state region, while providing consistently high margins and growing revenue by more than 200% in 4 years.
- Negotiated contracts with training vendors, resulting in delivery of high-quality job training courses to over 300 welfare-to-work and under employed participants
- Directed training center staff of 17 in promoting, selecting, and placing over 400 trainees in high quality employment-related training

Organizational Development & Training

- Developed improvements to employee suggestion process increasing supervisor processed suggestions from 3% to 25%, while improving support for employees
- Developed on-line referral process, reducing time to initiate and receive training referrals by 300%, while increasing accuracy and eliminating paper system
- Led training department staff of 11 trainers, educators and support personnel – providing an average of 50,000 hrs/year of highly effective training

Change Management

- Developed and implemented process for problem solving that produced 19 Kaizen workshops with improvements to 61 manufacturing and PC&L processes
- Coordinated capacity improvement project with Facilities, Engineering, Operations Departments, and union leadership that saved $2.1M, using 5S principles
- Managed $1.2M internal leadership assessment process using outside vendor resulting in significant improvements to Maintenance operations effectiveness

EDUCATION

1997   Master of Science – Organizational Leadership and Quality,
                    Marian University, formerly Marian College, Fond du Lac, WI
                    GPA 3.8
1996   Bachelors of Science – Quality and Productivity Management,
                    Marian University, formerly Marian College, Fond du Lac, WI
                    GPA 3.8 – Magna Cum Laude

COMMUNITY INVOLVEMENT

2009 – Present   Served as Congregational President of Mt. Calvary Lutheran Church
1996 – 2004   Chaired Board of Education at Mt. Calvary Lutheran School
2000   Contributed to ANSI Quality Standard Z1.11 (the training function

equivalent to ISO 9000)

2000   Presented to U.S. Dept of Labor conference on dislocated workers

RUSSELL

CERTIFICATIONS AND ACCOMPLISHMENTS

Quality   Senior Fellow – American Society for Quality

Training   Certified General Motors Professional Manager of Training

OD   Certified - Human Resource Development Representative

Computers   20 years of experience in using Word & Excel. Deep experience with PowerPoint, Visio, Access & network design and administration.

EMPLOYMENT HISTORY

Currently   **Executive Director – Quest-Milwaukee at The Institute for The Transformation of Learning at Marquette University**
- Developed long range business plan
- Developing blended learning school model
- Developing charter application for a charter network

8/10 to 10/10   **External Consultant**
- Developed and executed of succession plan
- Supporting operational excellence & customer service

12/09 to 7/10   **Executive Director – Catapult Learning**
- Managed operations and business development for a 4 state region
- Served as member of the corporate Executive Team

1/06 to 12/09   **Regional Director – Catapult Learning**
- Managed operations in Milwaukee and Minneapolis offices
- Developed new business opportunities

9/04 to 1/06   **Quality Network Representative - Delphi Electronics & Safety**
- Developed and implemented processes for problem solving, increasing effectiveness of this continuous improvement activity
- Identified and validated improvement opportunities

1/04 to 9/04   **Project Coordinator - Delphi Electronics & Safety**
- Identified barriers and facilitated action plans to achieve project goals of increasing capacity without additional capital outlay
- Coordinated project logistics with strategic leadership committee for review, input, and alignment with strategic vision

9/02 to 1/04   **Operations (Section) Manager – YWCA of Greater Milwaukee**
- Determined market outlook for employment, negotiated contracts with training vendors, developed relationships with agencies
- Managed operations staff delivering services to agency's W2 clients

1/02 to 9/02   **Technical Training Manager – Workforce Training Center (YWCA)**
- Developed, monitored, and improved systems and procedures for training dislocated, incumbent and new workers
- Developed links to job placement sites for interns and graduates of training center programs

2/89 to 1/02   **Training and Human Resource Development** — **Delphi Electronics**
- Assessed organizational readiness & assisted leadership in identifying organizational development goals
- Supported communications function by implementing reader data to improve content and style of internal publications
- Established long-range training objectives and training systems, resulting in improved delivery of instruction and ROI

3/01 to 10/02   **Consultant** - **Wisconsin Regional Training Partnership (part time)**
- Provided assistance with incumbent worker training grant & consulted on development of 3 learning centers

ARTICLES OF INCORPORATION
OF
QUEST MILWAUKEE, INC.
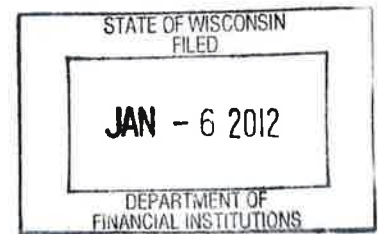
The undersigned, acting as incorporator of a nonstock corporation under the Wisconsin Nonstock Corporation Law, Chapter 181 of the Wisconsin Statutes (the "WNCL"), hereby adopts the following Articles of Incorporation (the "Articles") for such corporation:

ARTICLE I
Name

The name of the corporation is Quest Milwaukee, Inc.

ARTICLE II
Purposes

The corporation is organized and shall be operated exclusively for charitable and educational purposes within the meaning of I.R.C. Section 501(c)(3). Such purposes may include, but are not limited to, establishing and operating a network of charter schools and improving the academic performance and financial well-being of independent charter schools. The corporation may carry out its purposes directly or by making gifts, grants or other payments to other qualifying organizations. In addition, the Bylaws of the corporation shall provide that the corporation is authorized to make distributions in accordance with subsection 181.1302(3) of the WNCL. In these Articles, the term "I.R.C." means the Internal Revenue Code and references to provisions thereof are to such provisions as are from time to time amended and to corresponding provisions of any future United States Internal Revenue Law.

ARTICLE III
Activities and Restrictions

Section 1.   No dividends, liquidating dividends, or distributions shall be declared or paid by the corporation to any private individual or officer or director of the corporation.

Section 2.   No substantial part of the activities of the corporation shall consist in carrying on propaganda or otherwise attempting to influence legislation, unless by appropriate election a greater part is permitted without jeopardizing the corporation's exemption under I.R.C. Section 501(c)(3). The corporation shall neither participate in, nor intervene in, any political campaign on behalf of (or in opposition to) any candidate for public office, including the publishing or distribution of any statements.

Section 3.   No part of the net earnings or net income of the corporation shall inure to the benefit of any private individual or officer or director of the corporation; provided, however, that such a person may receive reasonable compensation for personal services rendered, or

reimbursement for reasonable expenses incurred, which are necessary to carrying out the exempt purposes of the corporation.

Section 4.   Notwithstanding any other provision of these Articles, the corporation shall not carry on any other activities not permitted to be carried on by a corporation exempt from federal income tax under I.R.C. Section 501(c)(3) or by a corporation contributions to which are deductible under I.R.C. Section 170(c)(2).

Section 5.   Whenever the corporation is a private foundation as defined in Section 509(a), the income of the corporation shall be distributed at such time and in such manner as not to subject it to tax under I.R.C. Section 4942 and the corporation shall not engage in any act of self-dealing, or retain any excess business holdings, or make any taxable expenditures as defined in I.R.C. Sections 4941(d), 4943(c) and 4945(d), respectively, or make any investments in such manner as to subject it to tax under I.R.C. Section 4944; or make any indemnification which would give rise to a penalty excise tax under I.R.C. Chapter 42.

ARTICLE IV
Members

The corporation shall have no members.

ARTICLE V
Directors

The affairs of the corporation shall be managed by its Board of Directors, which shall consist of such number of persons as shall be fixed by the Bylaws from time to time, but shall not be less than the number of directors required by the WNCL, which at the time of execution of these Articles is three (3). The terms of office, qualifications and method of election of the directors shall be as specified in the Bylaws.

ARTICLE VI
Director Consent Actions

Any action required or permitted to be taken at a Board of Directors meeting may be taken by written action signed by two-thirds (2/3) of the directors then in office. Such action shall have the same force and effect as a vote of the Board of Directors taken at a meeting. All directors shall receive written notice of any action so taken, and the written action is effective on the date specified in the written consent or on the tenth day after the date on which written notice is given, whichever is later.

ARTICLE VII
Amendment

These Articles may be amended by a vote of a two-thirds (2/3) of the number of directors in office at the time that the amendment is adopted.

ARTICLE VIII
Dissolution

In the event of the dissolution of the corporation, the Board of Directors shall, after paying or making provision for the payment of all of the liabilities of the corporation, distribute all of the assets of the corporation exclusively to the Institute for the Transformation of Learning if it is then described in I.R.C. Sections 170(c)(2), 501(c)(3), 2055(a)(2) and 2522(a)(2) and is not a private foundation as defined in I.R.C. Section 509(a), or if it is not so described or if it is no longer in existence then to one or more organizations then described in I.R.C. Sections 170(c)(2), 501(c)(3), 2055(a)(2) and 2522(a)(2) having purposes substantially similar to those of the corporation (except that no private foundation as defined by I.R.C. Section 509(a) shall be a recipient) or to one or more units or agencies of federal, state or local government to be used exclusively for public purposes, as the Board of Directors shall determine. Any of such assets not so distributed shall be distributed to one or more of such organizations as determined by the Circuit Court of the county in which the principal office of the corporation is then located.

ARTICLE IX
Miscellaneous

Section 1.　　The mailing address of the principal office of the corporation is Quest Milwaukee, Inc., 750 N. 18th Street, Suite 130, Milwaukee, Wisconsin 53233, Attention Executive Director.

Section 2.　　The street address of the corporation's initial registered office is 750 N. 18th Street, Suite 130, Milwaukee, Wisconsin 53233, and the name of the corporation's initial registered agent at that office is Howard Fuller.

Section 3.　　The name and address of the incorporator is: Lynette M. Zigman, Foley & Lardner LLP, 777 E. Wisconsin Ave., Milwaukee, WI 53202.
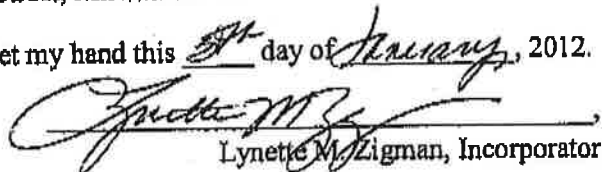
Section 4.　　The initial Directors shall serve until their successors are elected pursuant to the Bylaws of the Corporation. The names and addresses of the persons constituting the initial Board of Directors are:

　　　　Howard Fuller, 750 North 18th Street, Milwaukee WI 53233
　　　　Deborah McGriff, 750 North 18th Street, Milwaukee WI 53233
　　　　Robert Davis, 750 North 18th Street, Milwaukee WI 53233

IN WITNESS WHEREOF, I have hereunto set my hand this _8th_ day of _January_, 2012.

　　　　　　　　　　　　　　　　　　Lynette M. Zigman, Incorporator

This document was drafted by and should be returned to Lynette Zigman, Foley & Lardner LLP, 777 East Wisconsin Avenue, Milwaukee, Wisconsin 53202-5306. Telephone no. 414-297-5733.

STATE OF WISCONSIN
FILED

JAN - 6 2012

DEPARTMENT OF
FINANCIAL INSTITUTIONS

Quest

Unanimous written resolution of

the Board of Directors

RESOLVED, that:
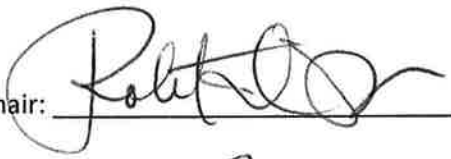
1.   The actions of Lynette Zigman as incorporator, in executing and causing to be duly filed and recorded the Articles of Incorporation of this Corporation, and in naming therein the initial directors of this Corporation, are hereby ratified, approved and confirmed.

2.   The Bylaws of the Corporation, attached hereto as Exhibit A, are hereby adopted by the Corporation and the Secretary is directed to insert the Articles of Incorporation and the Bylaws into the minute book of the Corporation.

3.   The following individuals are elected to serve as directors of the Corporation:

4.   The following are hereby elected as officers of this Corporation to serve until the first annual meeting of the Board of Directors and until their successors are determined:

   Chair -- Robert Davis

   Secretary -- Deborah McGriff

   Treasurer -- Howard Fuller

5.   The fiscal year of the Corporation shall end on June 30 of each year.

6.   The Chair or the Treasurer is hereby authorized on behalf of this Corporation to open such bank checking account(s) with such bank(s) as either of them may deem necessary or advisable; the authorized signers of checks or withdrawal orders in connection with any such account shall be any of the persons whose names and signatures shall have been certified to such bank from time to time by the Secretary of this Corporation to be the Chair and Treasurer of this Corporation; and any such bank shall be fully protected in relying on any such certification by the Secretary until it shall have received written notice of a change in such office or in such signing authority. If such depository bank shall require a depository resolution in any form different from, but generally consistent with, the foregoing, such other depository resolution shall be deemed to have been duly approved and adopted hereby, and may be so certified by the Secretary, whenever approved by the Secretary and a copy thereof has been inserted into the minute book of this Corporation.

7.   The officers of the Corporation are hereby authorized and empowered to take such action and execute and file such documents as may be necessary to effect the foregoing resolutions.

Board Chair: _____ (Robert Davis)

Board Member: _____ (Howard Fuller)

Board Member: _____ (Deborah McGriff)

BYLAWS
OF
QUEST MILWAUKEE, INC.

ARTICLE I
Offices

Section 1. Principal Office. The corporation may have such offices, either within or without the State of Wisconsin, as may be designated from time to time by resolution of the Board of Directors, one of which may be designated as the principal office.

Section 2. Registered Office and Registered Agent. The corporation shall maintain a registered office and registered agent in the State of Wisconsin. The registered office may, but need not be, the same as any of its places of business. The identity and address of the registered agent may be changed from time to time by notifying the Wisconsin Department of Financial Institutions pursuant to the provisions of the Wisconsin Nonstock Corporation Law (the "WNCL").

ARTICLE II
Board of Directors

Section 1. General Powers. The affairs of the corporation shall be managed by its Board of Directors.

Section 2. Number and Qualifications of Directors.

(a)   The number of directors shall be as determined by the Board of Directors from time to time but in no event less than three (3) nor more than fifteen (15) and shall serve for the term provided in Section 3 of this Article. No amendment of this section shall reduce the number of directors to less than the number required by the WNCL, which at the time of adoption of these bylaws is three (3).

(b)   Directors need not be residents of the State of Wisconsin.

(c)   Ex Officio Director. The Executive Director hired by the corporation shall be an ex officio director of the corporation without voting rights. The ex officio director shall not be included in the total number of directors authorized in subsection (a) above, and shall not be taken into account for either purposes of determining whether a quorum exists or for purposes of calling meetings.

Section 3. Election and Term.

Method of Election. Directors, other than any ex officio director, of this corporation shall be elected at the annual meeting of the Board of Directors.

(b) Classification. Directors, other than any ex officio director, shall be classified with respect to the time for which they shall hold office by dividing them into two (2) classes of, as nearly as possible, an equal number of directors. The directors of the first class shall hold office for an initial term of one (1) year, and the directors of the second class for an initial term of two (2) years. At the close of each annual meeting of this corporation, the successors to the class of directors whose terms expire that year shall commence to hold office for a term of two (2), or until their successors have been elected and qualified. In the event of an increase in the number of directors, the remaining directors shall assign the newly created directorship(s) to the appropriate class or classes so that the two (2) classes shall continue to consist of, as nearly as possible, an equal number of directors.

(c) Term of Office. There are no limits on the number of terms for which an individual shall be eligible to serve as a director. However, reelection shall not be automatic but shall instead require the consideration and approval of the Board as described in Section 3(a) above.

(d) Honorary Directors. A person who has served for at least six (6) years on the Board of Directors may be elected as an honorary director by the Board at any regular or special meeting. The Board of Directors, in its discretion, may also appoint other individuals to serve as honorary directors upon such conditions as the Board deems appropriate. Honorary directors shall serve at the discretion of the Board, shall be entitled to receive notices of Board of Directors' meetings and copies of minutes of such meetings, and shall be entitled to attend such meetings, but shall not be entitled to vote and shall not count for purposes of determining whether a quorum exists. Honorary directors may be invited to undertake special assignments at the request of the Board of Directors.

Section 4. Resignation. A director may resign at any time by filing a written resignation with the Chair or the Secretary of the corporation.

Section 5. Removal. A director may be removed from office with or without cause by the vote of a majority of the other directors of this corporation either at a regular meeting or at any special meeting called for that purpose.

Section 6. Vacancies. In the event a vacancy occurs in the Board of Directors from any cause, including an increase in the number of directors, an interim director shall be elected by the Board of Directors of this corporation. An interim director shall serve until a successor is elected upon expiration of the term of office for that director.

Section 7. Annual Meeting. The annual meeting of the Board of Directors shall be held in the month of June in each year, at such time and place as the Board of Directors may determine, for the purpose of transacting such business as may come before the meeting.

Section 8. Regular Meetings. The Board of Directors may provide by resolution for regular or stated meetings of the Board, to be held at a fixed time and place, and upon the passage of any such resolution such meetings shall be held at the stated time and place without other notice than such resolution.

Section 9. Special Meetings. Special meetings of the Board of Directors may be held at any time and place for any purpose or purposes, unless otherwise prescribed by the WNCL, on call of the Chair or Secretary, and shall be called by the Secretary on the written request of a majority of the directors then in office.

Section 10. Meetings By Telephone or Other Communication Technology.

(a) Any or all directors may participate in a regular or special meeting or in a committee meeting of the Board of Directors by conducting the meeting through the use of telephone or any other means of communication by which either: (i) all participating directors may simultaneously hear each other during the meeting or (ii) all communication during the meeting is immediately transmitted to each participating director, and each participating director is able to immediately send messages to all other participating directors.

(b) If a meeting will be conducted through the use of any means described in subsection (a), all participating directors shall be informed that a meeting is taking place at which official business may be transacted. A director participating in a meeting by any means described in subsection (a) is deemed to be present in person at the meeting.

Section 11. Notice and Waiver of Notice.

(a) Notice. Notice of the date, time and place of any annual or special meeting shall be given by oral or written notice delivered personally to each director at least twenty-four (24) hours prior thereto, or by written notice given by other than personal delivery at least forty-eight (48) hours prior thereto. Notice shall be given in one of the methods described in Article III hereof. The purpose of and the business to be transacted at any special meeting of the Board of Directors need not be specified in the notice or waiver of notice of such meeting.

(b) Waiver of Notice. Whenever any notice whatever is required to be given under the provisions of the WNCL or under the provisions of the Articles of Incorporation or Bylaws of the corporation, a waiver thereof in writing, signed at any time by the person or persons entitled to such notice, shall be deemed equivalent to the giving of such notice. The attendance of a director at a meeting shall constitute a waiver of notice of such meeting, except where a director attends the meeting for the express purpose of objecting to the transaction of any business because the meeting is not lawfully called or convened.

Section 12. Quorum. A majority of the number of directors then in office shall constitute a quorum for the transaction of business at any meeting of the Board of Directors, but if less than such majority is present at a meeting, a majority of the directors present may adjourn the meeting from time to time without further notice. Any ex officio director or honorary director shall not be taken into account for purposes of determining whether a quorum exists under this Section 12.

Section 13. Manner of Acting. The act of a majority of the directors present at a meeting at which a quorum is present shall be the act of the Board of Directors, unless the act of a greater number is required by the WNCL, or the Articles of Incorporation or Bylaws of the corporation.

Section 14. Action by Written Consent of Directors. Any action required by the Articles of Incorporation or Bylaws of the corporation, or any provision of the WNCL, to be taken at a meeting, or any other action which may be taken at a meeting, may be taken without a meeting if a consent in writing setting forth the action so taken shall be signed by two-thirds of the directors entitled to vote with respect to the subject matter thereof. Such consent shall have the same force and effect as a vote of the Board of Directors taken at a meeting. As provided in the Articles of Incorporation, an action required or permitted to be taken at a board meeting may be taken by written action signed by two-thirds (2/3) of the directors then in office. All directors shall receive written notice of any action so taken, and the written action is effective on the date specified in the written consent or on the tenth day after the date on which written notice is given, whichever is later.

Section 15. Presumption of Assent. A director of the corporation who is present at a meeting of the Board of Directors, or a committee thereof, at which action on any corporate matter is taken shall be presumed to have assented to the action taken unless such director's dissent or abstention shall be entered in the minutes of the meeting or unless such director shall file a written dissent or abstention to such action with the person acting as the Secretary of the meeting before the adjournment thereof or shall forward such dissent or abstention by registered mail to the Secretary of the corporation immediately after the adjournment of the meeting. Such right to dissent or abstain shall not apply to a director who voted in favor of such action.

Section 16. Compensation. Directors of the corporation shall not receive compensation for serving as directors or for providing other personal services to the corporation. However, directors may receive reimbursement for reasonable expenses incurred in connection with corporate matters, provided that such reimbursement is authorized by the Board of Directors.

Section 17. Committees. The Board of Directors by resolution may create committees having such powers as are then permitted by the WNCL and as are specified in the resolution.

(a) Executive Committee. The Board of Directors by resolution shall create an Executive Committee consisting of three (3) or more directors designated by the Board of Directors, having such powers and duties, not inconsistent with subsection (c) hereof or any existing delegation of powers to a committee of directors, as may be provided in the resolution creating such committee as initially adopted or as thereafter supplemented or amended by further resolution adopted by similar vote. The Executive Committee shall have and may exercise, when the Board of Directors is not in session, all of the powers of the Board of Directors in the management of the business and affairs of the corporation. The Chair, Secretary, and Treasurer shall be voting members of the Executive Committee. The Executive Director of the corporation shall attend Executive Committee meetings and closed sessions, provided, however, that the Executive Committee may request that the Executive Director not attend any such meetings or closed sessions, in which case the Executive Director shall not attend.

(b) <u>Finance Committee</u>. The Board of Directors by resolution shall create a Finance Committee. The Finance Committee shall consist of the Treasurer and two (2) or more additional directors designated by the Board of Directors. The Finance Committee may also consist of, in the discretion of the Board, honorary directors. Any actions of the Finance Committee shall be reported to the Board of Directors at the next meeting succeeding such action. The Board of Directors by resolution may give a Finance Committee created under this section any or all of the following responsibilities:

(1) The Board of Directors may authorize and/or require the Finance Committee to make a periodic review of the fiscal and business operations of the corporation, including a review of the balance sheet and the operating funds of the corporation. A report and recommendations relative thereto should then be made at each meeting of the Board of Directors.

(2) The Board of Directors may authorize and/or require the Finance Committee to recommend investment guidelines for the corporation's investment assets, carry out any authority delegated to the Finance Committee pursuant to such guidelines or as otherwise authorized by the Board of Directors, review investment performance, and report on investment matters at least quarterly to the Board of Directors.

(3) The Board of Directors may authorize and/or require the Finance Committee to periodically review the insurance coverage and needs of the corporation and report their recommendations to the Board of Directors.

(4) The Board of Directors may authorize and/or require the Finance Committee to approve the annual budget before it is presented to the Board of Directors for adoption.

(c) <u>Audit Committee</u>. The Board of Directors shall create annually an Audit Committee, which shall exist solely for the purpose and duration of the annual audit process. The Audit Committee shall consist of at least one of the officers of the corporation, one (1) or more additional directors designated by the Board, and, in the discretion of the Board, honorary directors. The Treasurer of the corporation may, but need not be, a member of the Audit Committee. If the Treasurer of the corporation is a member of the Audit Committee, however, the Treasurer may not serve as the Chair of the Audit Committee. The membership of the Audit Committee shall be established annually and without respect to the membership in the prior year. The Board of Directors may authorize and/or require the Audit Committee to retain an independent auditor to perform audits that otherwise would be performed by the Finance Committee or the Audit Committee.

(d) <u>Other Committees</u>. The Board of Directors by resolution may create one or more other committees, each consisting of three (3) or more directors designated by the Board of Directors, having such powers and duties, not inconsistent with subsection (c) hereof or any existing delegation of powers to a committee of directors, as may be provided in the resolution creating such committee as initially adopted or as thereafter supplemented or amended by further resolution adopted by similar vote. The Board of Directors also designates persons who are not directors to serve as non-voting members of any such committee with the exception of the Executive Committee.

(e) Nondelegable Powers: Alternative Members; Rules of Committees. No committee of directors shall be empowered to act in lieu of the entire Board of Directors in respect to election of officers or the filling of vacancies on the Board of Directors or on committees of directors created pursuant to this Section 17. All members of the Board of Directors who are not members of a given committee shall be alternate members of such committee and may take the place of any absent member or members at any meeting of such committee, upon request of the Chair or the chairman of such meeting. Each committee of directors shall fix its own rules governing the conduct of its activities, not inconsistent with rules promulgated by the Board of Directors, and shall make such reports to the Board of Directors of its activities as the Board may request.

Section 18. Conflict of Interest.

(a) Each director shall disclose to the Board of Directors any duality of interest or possible conflict of interest whenever the duality or conflict pertains to a matter being considered by the Board.

(b) Any director having duality of interest or conflict of interest on any matter shall abstain from voting on the matter and shall not be counted in determining the quorum for the vote on the matter. In addition, he or she shall not use his or her personal influence on the matter, but may briefly state his or her position on the matter and may answer pertinent questions from other directors since his or her knowledge may be of great assistance.

(c) The minutes of the meeting involving any such situation shall reflect that a disclosure was made, the abstention from voting, and the quorum situation.

(d) If a director is uncertain as to whether he or she has a duality or conflict of interest which requires abstention, or if a director asserts that another director has such a duality or conflict, the Board, by majority vote of those present other than the director having the possible conflict, shall decide whether abstention is required. If abstention is required, the affected director shall abstain from voting on the matter.

(e) No purchase involving $1,000 or more from any director or any entity of which the director is an officer, director, partner or owner shall be made without prior approval of the Board of Directors.

ARTICLE III
Methods of Giving Notice

Notice of any annual or special meeting of directors, and any other notice required to be given under these Bylaws or the WNCL may be communicated in person, by telephone, telegraph, teletype, facsimile or other form of wire or wireless communication, or by mail or private carrier, and, if these forms of personal notice are impracticable, notice may be communicated by a newspaper of general circulation in the area where published, or by radio, television or other form of public broadcast

communication. Oral notice is effective when communicated. Written notice is effective at the earliest of the following:

(a)   When received.

(b)   When deposited in the U.S. mail, if mailed postpaid and correctly addressed.

(c)   On the date shown on the return receipt, if sent by registered or certified mail, return receipt requested, and the receipt is signed by or on behalf of the addressee.

ARTICLE IV
Officers

Section 1. Number. The principal officers of the corporation shall be a Chair, a Secretary, and a Treasurer, each of whom shall be elected by the Board of Directors. The Board of Directors may elect such other officers and assistant officers and agents as may be deemed necessary. Officers shall be members of the Board of Directors.

Section 2. Election and Term of Office. The officers of the corporation shall be elected annually by the Board of Directors at its annual meeting. If the election of officers shall not be held at such meeting, such election shall be held as soon thereafter as conveniently may be. Each officer shall hold office from the close of the annual meeting for a term of one year, or until a qualified successor is elected upon expiration of the term of that officer, or until that officer's death, or until that officer shall resign or shall have been removed in the manner hereinafter provided.

Section 3. Removal. Any officer or agent elected or appointed by the Board of Directors may be removed by the Board of Directors, whenever in its judgment the best interests of the corporation will be served thereby, but such removal shall be without prejudice to the contract rights, if any, of the person so removed. Election or appointment shall not of itself create contract rights.

Section 4. Vacancies. A vacancy in any office because of death, resignation, removal, disqualification or otherwise, may be filled by the Board of Directors for the unexpired portion of the term.

Section 5. Duties. Officers and agents elected or appointed by the Board of Directors shall have such powers and perform such duties as may from time to time be prescribed by resolution of the Board of Directors and, failing such resolution, shall have such powers and perform such duties as are normally incident to and incumbent upon their respective officers.

Section 6. Compensation. Officers of the corporation shall not receive compensation for serving as officers or for providing other personal services to the corporation. However, officers may receive reimbursement for reasonable expenses incurred in connection with corporate matters, provided that such reimbursement is authorized by the Board of Directors.

ARTICLE V

Indemnification

Section 1. Mandatory Indemnification. The corporation shall, to the fullest extent permitted or required by Sections 181.0871 to 181.0889, inclusive, of the WNCL, including any amendments thereto (but in the case of any such amendment, only to the extent such amendment permits or requires the corporation to provide broader indemnification rights than prior to such amendment), indemnify its Directors and Officers against any and all Liabilities, and advance any and all reasonable Expenses, incurred thereby in any Proceeding to which any Director or Officer is a Party because such Director or Officer is a Director or Officer of the corporation. The corporation may indemnify its employees and authorized agents, acting within the scope of their duties as such, to the same extent as Directors or Officers hereunder. The rights to indemnification granted hereunder shall not be deemed exclusive of any other rights to indemnification against Liabilities or the advancement of Expenses which such Director or Officer may be entitled under any written agreement, board resolution, vote of the Members, the WNCL or otherwise. All capitalized terms used in this Article V and not otherwise defined herein shall have the meaning set forth in Section 181.0871 of the WNCL.

Section 2. Permissive Supplementary Benefits. The Corporation may, but shall not be required to, supplement the foregoing right to indemnification against Liabilities and advancement of Expenses under Section 1 of this Article by (a) the purchase of insurance on behalf of any one or more of such Directors, Officers, employees or agents, whether or not the corporation would be obligated to indemnify or advance Expenses to such Director, Officer, employee or agent under Section 1 of this Article, and (b) entering into individual or group indemnification agreements with any one or more of such Directors or Officers.

Section 3. Private Foundations. Notwithstanding the foregoing, whenever the corporation is a private foundation as defined in I.R.C. Section 509(a), it shall not make any indemnification which would give rise to a penalty excise tax under I.R.C. Chapter 42.

ARTICLE VI

Fiscal Year

The fiscal year of the corporation shall end on the last day of June in each year.

ARTICLE VII

Seal

The corporation has no corporate seal.

ARTICLE VIII

Corporate Acts, Loans, and Deposits

Section 1. Corporate Acts. The Finance Committee shall develop in writing a policy, which shall then be submitted to the Board of Directors for final approval, that establishes procedures for signing, executing, and acknowledging corporate acts. In the absence of such a policy, the Treasurer shall hold joint authority that must be exercised in conjunction with another officer to sign, execute, and acknowledge on behalf of the corporation, all deeds, mortgages, bonds, stock certificates, contracts, leases, reports, and all other documents or instruments necessary or proper to be executed in the course of the corporation's regular business, or which shall be authorized by resolution of the Board of Directors. The Secretary of the corporation is authorized and empowered to sign in attestation all documents so signed, and to certify and issue copies of any such document and of any resolution adopted by the Board of Directors of the corporation.

Section 2. Loans. No moneys shall be borrowed on behalf of the corporation and no evidences of such indebtedness shall be issued in its name unless authorized by a resolution of the Board of Directors. Such authority may be general or confined to specific instances.

Section 3. Deposits. All funds of the corporation, not otherwise employed, shall be deposited from time to time to the credit of the corporation in such banks, investment firms or other depositories as the Board of Directors may select.

ARTICLE IX
Amendments

Section 1. By the Directors. These Bylaws may be altered, amended or repealed and new Bylaws may be adopted by the Board of Directors at any regular or special meeting thereof.

Section 2. Implied Amendments. Any action taken or authorized by the Board of Directors, which would be inconsistent with the Bylaws then in effect but is taken or authorized by affirmative vote of not less than the number of directors required to amend the Bylaws so that the Bylaws would be consistent with such action, shall be given the same effect as though the Bylaws had been temporarily amended or suspended so far, but only so far, as is necessary to permit the specific action so taken or authorized.

****

Certified a true and correct copy of the Bylaws adopted on the18th day of January, 2012, by the Board of Directors of Quest Milwaukee, Inc.

_____
Secretary

BOARD CHAIR

1.   Preside over Executive Committee and Board meetings

   •   Supervising / participating in the setting of the agendas.
   •   Managing discussion to ensure that results of the meeting are produced.
   •   Maintaining decorum or assigning another board member to ensure successful meetings.

2.   Lead the Board

   •   Play a leadership role in creating and holding the vision for the organization.
   •   Appoint committee chairs and ad hoc committees, as needed.
   •   Ensure that all Board members know what their role is, and have what they need to perform their role.
   •   Understand and apply the bylaws of the organization.
   •   Set an example for the Board (e.g., by conduct, speech, contribution, fundraising, knowledge of programs, engagement, etc.)
   •   Ensure adoption and implementation of Board policies and procedures.
   •   Ensure that Board members perform their duties and/or responsibilities, as well as conduct themselves appropriately.
   •   Ensure that policies and procedures are followed.

3.   Support the Executive Director

   •   Serve as primary liaison of the board to the Executive Director.
   •   Support the Executive Director as an advisor, coach, and/or manager.
   •   Respond promptly to Executive Director's communications and requests.
   •   Oversee the process of annual performance review of the Executive Director.

4.   Serve as lead ambassador of the agency

   •   Represent the agency in the community (locally, regionally, and nationally).
   •   If requested by the Executive Director, serve as a spokesperson for the agency.
   •   Serve as spokesperson for the Board.

5.   Ensure that the duties of the Board of Directors are fulfilled, especially:

   •   Speaking with one voice.
   •   Upholding, at all times, the best interests of the organization.
   •   Ensuring that the organization has the resources required to sustain and grow its operations.
   •   Ensuring that the Executive Director is empowered to succeed.
   •   Providing effective governance and oversight of the organization.

Elected By: Board

Length of Term: One year

BOARD SECRETARY

1.   The Secretary serves as the custodian and source of all official Organization (board) records.

2.   Certify and keep at the principal office of the Organization the original or a copy of the bylaws as amended or otherwise altered to date.

3.   Serve on the Executive Committee

4.   Keep at the principal office of the corporation, or at such a place as the board may determine, a book of minutes of all meetings of the directors and meetings of committees. Minutes shall record:

    • time and place of meeting, whether regular or special
    • how called
    • how notice was given
    • names of those present or represented at the meeting and proceedings of the meeting.

5.   Ensure that all notices are duly given in accordance with the provisions of the bylaws or a required by law.

6.   Be custodian of the records as authorized by law or the provisions of these bylaws, to duly executed documents of the corporation.

7.   Ensure annual meetings are held.

8.   Maintain a record of all resolutions and decisions of the board.

9.   In general, perform all duties incident to the office of the secretary and such other duties as may be required by law, by the Articles of Incorporation, or by the bylaws, or which may be assigned to him or her from time to time by the board.

Elected By: Board

Length of Term: One year

BOARD TREASURER

1.   Serves as the Chair of the Finance & Audit Committee and is responsible for insuring the proper management of Quest Milwaukee, Inc.'s assets.

2.   Manages, with the Finance Committee, the board's review of and action related to the board's financial responsibilities.

3.   Ensure that accurate and complete financial records are maintained

   •   Monitor income and expenditures against projections.
   •   Review and recommend financial policies to the board, including ensuring adequate internal controls and maintaining financial records in accordance with standard accounting practices.

4.   Oversees and works with the Executive Director in preparing the annual budget and presenting the budget to the board for approval.

   •   Propose for board approval a budget that reflects the organization's goals and board policies.
   •   Ensure that the budget accurately reflects the needs, expenses, and revenue of the organization.

5.   Safeguard the organization's assets

   •   Review proposed new funding for ongoing financial implications, recommending approval or disapproval to the board.
   •   Ensure that the organization has the proper risk-management provisions in place.

6.   Help the full board understand the organization's financial affairs

   •   Ensure that the board as a whole is well informed about the organization's finances.
   •   Educate the board about financial matters.

7.   Ensure compliance with federal, state, and other requirements related to the organization's finances

   •   Ensure that organization maintains adequate insurance coverage.
   •   Ensure that the IRS Form 990, other forms, and employment and other taxes required by government are filed completely, correctly, and on time.

8.   Reviews the annual audit and answers board members' questions about the audit.

9.   Serves as a member of the Executive Committee.

10.   Ensure compliance with financial requirements set forth by the University and Grantors.

Elected By: Board

Length of Term: One year

QUEST MILWAUKEE, INC.
CONFLICT OF INTEREST POLICY
Adopted January 18th, 2012

Article I
Purpose

The purpose of the Conflicts of Interest Policy ("Policy") is to protect the interest of Quest Milwaukee, Inc. ("Quest"), when it is contemplating entering into a transaction or arrangement that might benefit the private interest of a Quest director, officer, or member of a committee ("Committee") with powers delegated from the Board of Directors ("Board"). The Policy is also intended to protect the interest of Quest when it is contemplating entering into a transaction that might result in an excess benefit transaction. This Policy is intended to supplement, but not replace, any applicable federal or state laws governing conflicts of interest.

Article II
Definitions

1.   <u>Interested Person</u>. Any director, officer, or member of a Committee who has a direct or indirect Financial Interest, as defined below, is an "Interested Person".

2.   <u>Financial Interest</u>. A person has a "Financial Interest" if the person has, directly or indirectly, through business, investment or family:

        (a)   an ownership or investment interest in any entity with which Quest has a transaction or arrangement,

        (b)   a compensation arrangement with Quest or with any entity or individual with which Quest has a transaction or arrangement; or

        (c)   a potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which Quest is negotiating a transaction or arrangement.

Compensation includes direct and indirect remuneration, as well as gifts or favors that are substantial in nature. A Financial Interest is not necessarily a conflict of interest. Under Article III, Section 2, an Interested Person who has a Financial Interest has a conflict of interest only if the Board or appropriate committee decides that a conflict of interest exists.

Article III
Procedures

1.   <u>Duty to Disclose</u>. In connection with any actual or possible conflicts of interest, an Interested Person must disclose the existence of his or her Financial Interest to the Board of Directors ("Board")

and to members of any Committees that are considering the proposed transaction or arrangement, and must be given the opportunity to disclose all material facts.

2. <u>Determining Whether a Conflict of Interest Exists</u>. After disclosure of the Financial Interest and all material facts, and after any discussion between the Interested Person and the Board or Committee, the Interested Person shall leave the Board or Committee meeting while the determination of a conflict of interest is discussed and voted upon. The remaining disinterested Board or Committee members shall decide if a conflict of interest exists.

3. <u>Procedures for Addressing the Conflict of Interest</u>.

(a) An Interested Person may make a presentation at the Board or Committee meeting, but after such presentation he or she shall leave the meeting during the discussion of and the vote on the transaction or arrangement that results in the conflict of interest.

(b) The chairperson of the Board or Committee shall, if appropriate, appoint a disinterested person or committee to investigate alternatives to the proposed transaction or arrangement.

(c) After exercising due diligence, the Board or Committee shall determine whether Quest can obtain a more advantageous transaction or arrangement with reasonable efforts from a person or entity that would not give rise to a conflict of interest.

(d) If a more advantageous transaction or arrangement is not reasonably attainable under circumstances that would not give rise to a conflict of interest, the Board or Committee shall determine by a majority vote of the disinterested directors whether the transaction or arrangement is in Quest's best interest, for Quest's own benefit, and fair and reasonable to Quest, and shall then make its decision as to whether to enter into the transaction or arrangement in conformity with such determination.

(e) In the event that the Board or Committee makes the decision to enter into the transaction or arrangement, the Board or Committee shall set all reasonable procedures to limit and/or isolate the transaction or arrangement from other Quest activities.

4. <u>Violations of the Conflicts of Interest Policy</u>.

(a) If the Board or Committee has reasonable cause to believe that a director, officer, or Committee member has failed to disclose actual or possible conflicts of interest, it ,shall inform the member of the basis for such belief and afford the director, officer, or Committee member an opportunity to explain the alleged failure to disclose.

(b) If, after hearing the response of the director, officer, or Committee member and making such further investigation as may be warranted under the circumstances, the Board or Committee determines that the director, officer, or Committee member has in fact failed to disclose an actual or possible conflict of interest, the Board or Committee shall take appropriate disciplinary and corrective action which may include removing the director, officer or Committee member from the Board or the Committee of which they are members and relieving the director, officer, or Committee member of his or her duties as a director or officer of the corporation.

Article IV

Records of Proceedings

1.   Records. The minutes of the meeting of the Board and all Committees shall contain:

(a)   The names of the persons who disclosed or otherwise were found to have a Financial Interest in connection with an actual or possible conflict of interest; the nature of the Financial Interest; any action taken to determine whether a conflict of interest was present; and the Board's or Committee's decision as to whether a conflict of interest in fact existed.

(b)   The names of the persons who were present for discussions and votes relating to the transaction or arrangement; the content of the discussion, including any alternatives to the proposed transaction or arrangement; and a record of any votes taken in connection therewith.

Article V

Compensation

A voting member of the Board who receives compensation, directly or indirectly, from Quest for services, or a voting member of any Committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from Quest for services, is precluded from voting on matters pertaining to that member's compensation.

Article VI

Annual Statements

1.   Annual Statement. Each director, ex-officio director, honorary director, officer, and member of a Committee shall annually sign a statement which affirms that such person:

(a)   Has received a copy of the Conflicts of Interest Policy;

(b)   Has read and understands the Policy;

(c)   Has agreed to comply with the Policy; and

(d)   Understands that Quest is a charitable organization and that in order to maintain its federal tax exemption it must engage primarily in activities that accomplish one or more of its tax-exempt purposes.

Article VII

Periodic Reviews

To ensure that Quest operates in a manner consistent with its charitable purposes, and does not engage in activities that could jeopardize its status as an organization exempt from federal income tax; Periodic Reviews shall be conducted. The Periodic Reviews shall, at a minimum, include the following subjects:

1.   Whether compensation arrangements and benefits are reasonable and the result of arm's-length bargaining.

2.   Whether partnership and joint venture arrangements, and arrangements with management service organizations: conform to written policies, are properly recorded, reflect reasonable payments for goods and services, further Quest's charitable purposes, and do not result in inurement or impermissible private benefit.

Article VIII
Use of Outside Experts

In conducting the Periodic Reviews provided for in Article VII, Quest may, but need not, use outside advisors. If outside experts are used their use shall not relieve the Board of its responsibility for ensuring that Periodic Reviews are conducted.

Article IX
Special Situations

Individuals covered by this Policy may be confronted with special situations that are not specifically addressed by this Policy. If an individual has any question as to the proper course of action, the matter should be disclosed to the Chair, Secretary, or Treasurer, who shall address the matter with the Executive Committee. The Executive Committee shall determine the appropriate handling of such special situations.

QUEST MILWAUKEE, INC.
CONFLICT OF INTEREST DISCLOSURE STATEMENT

As part of the Conflicts of Interest Policy ("Policy"), Quest Milwaukee, Inc. ("Quest"), and its controlled affiliated entities (), requires that members of the Board of Directors ("Board"), offices and members of committees with Board delegated powers (Committees"), disclose any Financial Interest that could lead to an actual conflict of interest. This discloser form is intended to fulfill the Policy's annual disclosure requirement.

I.   Disclosure.

A.   Name of Responsible Person: _Dr. Robert M. Davis_

B.   Capacity:
   ☑ Member of Board of Directors
   ☐ Member of Board Committee
   ☑ Officer

C.   Have you, any of your family members, any entity in which you or a family member has a Financial Interest engaged in any of the following transactions with Quest in the past year:

   (i)   Provided services or property to Quest in exchange for considerations;

            ___ Yes   _✓ No

   (ii)   Had any direct or indirect interest in any transaction to which Quest was or is a party;

            ___ Yes   _✓ No

   (iii)   Been or become indebted to pay money to Quest (other than travel advances or the like);

            ___ Yes   _✓ No

   (iv)   Received, or become entitled to receive, directly or indirectly, any personal benefits from Quest as a result of your relationship with Quest, that in the aggregate could be valued in excess of $100.00, that were not or will not be compensation directly related to your duties to Quest; or

            ___ Yes   _✓ No

(v)   Had a compensation arrangement with any entity or individual with which Quest is negotiating a transaction or arrangement?

___ Yes   ___ No

If you answered yes to any of the above questions, please describe the situation(s) and if family a member or entity is involved, the identity of the family member or entity and your relationship with that person or entity.

_____ N/A _____

_____

_____

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_____

_____

_____

Signed :   JAnuary 31, 2012

QUEST MILWAUKEE, INC.
CONFLICT OF INTEREST DISCLOSURE STATEMENT

As part of the Conflicts of Interest Policy ("Policy"), Quest Milwaukee, Inc. ("Quest"), and its controlled affiliated entities (), requires that members of the Board of Directors ("Board"), offices and members of committees with Board delegated powers (Committees"), disclose any Financial Interest that could lead to an actual conflict of interest. This discloser form is intended to fulfill the Policy's annual disclosure requirement.

I.   Disclosure.

A.   Name of Responsible Person: _Dr. Howard Fuller_

B.   Capacity:
☑ Member of Board of Directors
☐ Member of Board Committee
☑ Officer

C.   Have you, any of your family members, any entity in which you or a family member has a Financial Interest engaged in any of the following transactions with Quest in the past year:

(i)   Provided services or property to Quest in exchange for considerations;

____ Yes   ✔ No

(ii)   Had any direct or indirect interest in any transaction to which Quest was or is a party;

____ Yes   ✔ No

(iii)   Been or become indebted to pay money to Quest (other than travel advances or the like);

____ Yes   ✔ No

(iv)   Received, or become entitled to receive, directly or indirectly, any personal benefits from Quest as a result of your relationship with Quest, that in the aggregate could be valued in excess of $100.00, that were not or will not be compensation directly related to your duties to Quest; or

____ Yes   ✔ No

(v)   Had a compensation arrangement with any entity or individual with which Quest is negotiating a transaction or arrangement?

_____ Yes   ✓ No

If you answered yes to any of the above questions, please describe the situation(s) and if family a member or entity is involved, the identity of the family member or entity and your relationship with that person or entity.

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1/28/12

QUEST MILWAUKEE, INC.
CONFLICT OF INTEREST DISCLOSURE STATEMENT

As part of the Conflicts of Interest Policy ("Policy"), Quest Milwaukee, Inc. ("Quest"), and its controlled affiliated entities (), requires that members of the Board of Directors ("Board"), offices and members of committees with Board delegated powers (Committees"), disclose any Financial Interest that could lead to an actual conflict of interest. This discloser form is intended to fulfill the Policy's annual disclosure requirement.

I.   Disclosure.

A. Name of Responsible Person: *Dr. Deborah M. McGriff*

B. Capacity:
☑ Member of Board of Directors
☐ Member of Board Committee
☑ Officer

C. Have you, any of your family members, any entity in which you or a family member has a Financial Interest engaged in any of the following transactions with Quest in the past year:

(i)   Provided services or property to Quest in exchange for considerations;

___ Yes   ✔ No

(ii)   Had any direct or indirect interest in any transaction to which Quest was or is a party;

___ Yes   ✔ No

(iii) Been or become indebted to pay money to Quest (other than travel advances or the like);

___ Yes   ✔ No

(iv)   Received, or become entitled to receive, directly or indirectly, any personal benefits from Quest as a result of your relationship with Quest, that in the aggregate could be valued in excess of $100.00, that were not or will not be compensation directly related to your duties to Quest; or

___ Yes   ✔ No

(v)   Had a compensation arrangement with any entity or individual with which Quest is negotiating a transaction or arrangement?

_____ Yes   ✓ No

If you answered yes to any of the above questions, please describe the situation(s) and if family a member or entity is involved, the identity of the family member or entity and your relationship with that person or entity.

_____

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January 28, 2012

Form 1023 Checklist

(Revised June 2006)

Application for Recognition of Exemption under Section 501(c)(3) of the Internal Revenue Code

Note. *Retain a copy of the completed Form 1023 in your permanent records. Refer to the* General Instructions *regarding Public Inspection of approved applications.*

Check each box to finish your application (Form 1023). Send this completed Checklist with your filled-in application. If you have not answered all the items below, your application may be returned to you as incomplete.

☑ Assemble the application and materials in this order:
- Form 1023 Checklist
- Form 2848, *Power of Attorney and Declaration of Representative* (if filing)
- Form 8821, *Tax Information Authorization* (if filing)
- Expedite request (if requesting)
- Application (Form 1023 and Schedules A through H, as required)
- Articles of organization
- Amendments to articles of organization in chronological order
- Bylaws or other rules of operation and amendments
- Documentation of nondiscriminatory policy for schools, as required by Schedule B
- Form 5768, Election/Revocation of Election by an Eligible Section 501(c)(3) Organization To Make Expenditures To Influence Legislation (if filing)
- All other attachments, including explanations, financial data, and printed materials or publications. Label each page with name and EIN.

☑ User fee payment placed in envelope on top of checklist. DO NOT STAPLE or otherwise attach your check or money order to your application. Instead, just place it in the envelope.

☐ Employer Identification Number (EIN)

☑ Completed Parts I through XI of the application, including any requested information and any required Schedules A through H.
- You must provide specific details about your past, present, and planned activities.
- Generalizations or failure to answer questions in the Form 1023 application will prevent us from recognizing you as tax exempt.
- Describe your purposes and proposed activities in specific easily understood terms.
- Financial information should correspond with proposed activities.

☑ Schedules. Submit only those schedules that apply to you and check either "Yes" or "No" below.

Schedule A   Yes ____   No ✓   Schedule E   Yes ____   No ✓

Schedule B   Yes ✓   No ____   Schedule F   Yes ____   No ✓

Schedule C   Yes ____   No ✓   Schedule G   Yes ____   No ✓

Schedule D   Yes ____   No ✓   Schedule H   Yes ____   No ✓

☑ An exact copy of your complete articles of organization (creating document). Absence of the proper purpose and dissolution clauses is the number one reason for delays in the issuance of determination letters.

- Location of Purpose Clause from Part III, line 1 (Page, Article and Paragraph Number)___**Article II**___
- Location of Dissolution Clause from Part III, line 2b or 2c (Page, Article and Paragraph Number) or by operation of state law _____**Article VIII**_____

☑ Signature of an officer, director, trustee, or other official who is authorized to sign the application.
- Signature at Part XI of Form 1023.

☑ Your name on the application must be the same as your legal name as it appears in your articles of organization.

Send completed Form 1023, user fee payment, and all other required information, to:

Internal Revenue Service
P.O. Box ~~102~~ 12192
Covington, KY 41012-0192

If you are using express mail or a delivery service, send Form 1023, user fee payment, and attachments to:

Internal Revenue Service
201 West Rivercenter Blvd.
Attn: Extracting Stop 312
Covington, KY 41011

✪ *Printed on recycled paper*

Form **1023**

(Rev. June 2006)
Department of the Treasury
Internal Revenue Service

Application for Recognition of Exemption
Under Section 501(c)(3) of the Internal Revenue Code

OMB No. 1545-0056

Note: *If exempt status is approved, this application will be open for public inspection.*

Use the instructions to complete this application and for a definition of all **bold** items. For additional help, call IRS Exempt Organizations Customer Account Services toll-free at 1-877-829-5500. Visit our website at **www.irs.gov** for forms and publications. If the required information and documents are not submitted with payment of the appropriate user fee, the application may be returned to you.

Attach additional sheets to this application if you need more space to answer fully. Put your name and EIN on each sheet and identify each answer by Part and line number. Complete Parts I - XI of Form 1023 and submit only those Schedules (A through H) that apply to you.

Part I   Identification of Applicant

1 Full name of organization (exactly as it appears in your **organizing document**) **Quest Milwaukee, Inc.**	2 c/o Name (if applicable) **Howard Fuller, Marquette University**

3 **Mailing address** (Number and street) (see instructions) **750 N. 18th Street**	Room/Suite **130**	4 Employer Identification Number (EIN) **80-0774583**
City or town, state or country, and ZIP + 4 **Milwaukee**		5 Month the annual accounting period ends (01 – 12) **June 30th**

6 Primary contact (officer, director, trustee, or **authorized representative**) a Name: **Lynette M. Zigman**	**b** Phone: **414-297-5733**
	c Fax: (optional) **414-297-4900**

7 Are you represented by an authorized representative, such as an attorney or accountant? If "Yes," provide the authorized representative's name, and the name and address of the authorized representative's firm. Include a completed Form 2848, *Power of Attorney and Declaration of Representative,* with your application if you would like us to communicate with your representative.	☑ Yes	☐ No
8 Was a person who is not one of your officers, directors, trustees, employees, or an authorized representative listed in line 7, paid, or promised payment, to help plan, manage, or advise you about the structure or activities of your organization, or about your financial or tax matters? If "Yes," provide the person's name, the name and address of the person's firm, the amounts paid or promised to be paid, and describe that person's role.	☐ Yes	☑ No
9a Organization's website: b Organization's email: (optional)		
10 Certain organizations are not required to file an information return (Form 990 or Form 990-EZ). If you are granted tax-exemption, are you claiming to be excused from filing Form 990 or Form 990-EZ? If "Yes," explain. See the instructions for a description of organizations not required to file Form 990 or Form 990-EZ.	☐ Yes	☑ No
11 Date incorporated if a corporation, or formed, if other than a corporation. (MM/DD/YYYY) **01** / **05** / **2012**		
12 Were you formed under the laws of a **foreign country?** If "Yes," state the country.	☐ Yes	☑ No

For Paperwork Reduction Act Notice, see page 24 of the instructions.   Cat. No. 17133K   Form **1023** (Rev. 6-2006)

Quest Milwaukee Charter Application - Page 84

Part II   **Organizational Structure**

You must be a corporation (including a limited liability company), an unincorporated association, or a trust to be tax exempt. (See instructions.) **DO NOT file this form unless you can check "Yes" on lines 1, 2, 3, or 4.**

1	Are you a **corporation**? If "Yes," attach a copy of your articles of incorporation showing **certification of filing** with the appropriate state agency. Include copies of any amendments to your articles and be sure they also show state filing certification.	☑ **Yes**	☐ **No**
2	Are you a **limited liability company (LLC)**? If "Yes," attach a copy of your articles of organization showing certification of filing with the appropriate state agency. Also, if you adopted an operating agreement, attach a copy. Include copies of any amendments to your articles and be sure they show state filing certification. Refer to the instructions for circumstances when an LLC should not file its own exemption application.	☐ **Yes**	☑ **No**
3	Are you an **unincorporated association**? If "Yes," attach a copy of your articles of association, constitution, or other similar organizing document that is dated and includes at least two signatures. Include signed and dated copies of any amendments.	☐ **Yes**	☑ **No**
4a	Are you a **trust**? If "Yes," attach a signed and dated copy of your trust agreement. Include signed and dated copies of any amendments.	☐ **Yes**	☑ **No**
b	Have you been funded? If "No," explain how you are formed without anything of value placed in trust.	☐ **Yes**	☑ **No**
5	Have you adopted **bylaws**? If "Yes," attach a current copy showing date of adoption. If "No," explain how your officers, directors, or trustees are selected.	☑ **Yes**	☐ **No**

Part III   **Required Provisions in Your Organizing Document**

The following questions are designed to ensure that when you file this application, your organizing document contains the required provisions to meet the organizational test under section 501(c)(3). Unless you can check the boxes in both lines 1 and 2, your organizing document does not meet the organizational test. **DO NOT file this application until you have amended your organizing document.** Submit your original and amended organizing documents (showing state filing certification if you are a corporation or an LLC) with your application.

1	Section 501(c)(3) requires that your organizing document state your exempt purpose(s), such as charitable, religious, educational, and/or scientific purposes. Check the box to confirm that your organizing document meets this requirement. Describe specifically where your organizing document meets this requirement, such as a reference to a particular article or section in your organizing document. Refer to the instructions for exempt purpose language. Location of Purpose Clause (Page, Article, and Paragraph): **Article II**	☑
2a	Section 501(c)(3) requires that upon dissolution of your organization, your remaining assets must be used exclusively for exempt purposes, such as charitable, religious, educational, and/or scientific purposes. Check the box on line 2a to confirm that your organizing document meets this requirement by express provision for the distribution of assets upon dissolution. If you rely on state law for your dissolution provision, do not check the box on line 2a and go to line 2c.	☐
2b	If you checked the box on line 2a, specify the location of your dissolution clause (Page, Article, and Paragraph). Do not complete line 2c if you checked box 2a. **Article VIII**	
2c	See the instructions for information about the operation of state law in your particular state. Check this box if you rely on operation of state law for your dissolution provision and indicate the state: _____	☑

Part IV   **Narrative Description of Your Activities**

Using an attachment, describe your *past, present,* and *planned* activities in a narrative. If you believe that you have already provided some of this information in response to other parts of this application, you may summarize that information here and refer to the specific parts of the application for supporting details. You may also attach representative copies of newsletters, brochures, or similar documents for supporting details to this narrative. Remember that if this application is approved, it will be open for public inspection. Therefore, your narrative description of activities should be thorough and accurate. Refer to the instructions for information that must be included in your description.

Part V   **Compensation and Other Financial Arrangements With Your Officers, Directors, Trustees, Employees, and Independent Contractors**

1a   List the names, titles, and mailing addresses of all of your officers, directors, and trustees. For each person listed, state their total annual **compensation**, or proposed compensation, for all services to the organization, whether as an officer, employee, or other position. Use actual figures, if available. Enter "none" if no compensation is or will be paid. If additional space is needed, attach a separate sheet. Refer to the instructions for information on what to include as compensation.

Name	Title	Mailing address	Compensation amount (annual actual or estimated)
Robert Davis	Director & President	750 N. 18th Street Milwaukee, WI 53233	$0
Howard Fuller	Director & Treasurer	750 N. 18th Street Milwaukee, WI 53233	$0
Deborah McGriff	Director & Secretary	750 N. 18th Street Milwaukee, WI 53233	$0

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Part V **Compensation and Other Financial Arrangements With Your Officers, Directors, Trustees, Employees, and Independent Contractors** *(Continued)*

b List the names, titles, and mailing addresses of each of your five highest compensated employees who receive or will receive compensation of more than $50,000 per year. Use the actual figure, if available. Refer to the instructions for information on what to include as compensation. Do not include officers, directors, or trustees listed in line 1a.

Name	Title	Mailing address	Compensation amount (annual actual or estimated)
None -- See attachment			

c List the names, names of businesses, and mailing addresses of your five highest compensated **independent contractors** that receive or will receive compensation of more than $50,000 per year. Use the actual figure, if available. Refer to the instructions for information on what to include as compensation.

Name	Title	Mailing address	Compensation amount (annual actual or estimated)
None			

The following "Yes" or "No" questions relate to *past, present, or planned* relationships, transactions, or agreements with your officers, directors, trustees, highest compensated employees, and highest compensated independent contractors listed in lines 1a, 1b, and 1c.

2a Are any of your officers, directors, or trustees **related** to each other through **family** or **business relationships**? If "Yes," identify the individuals and explain the relationship. ☑ Yes ☐ No

b Do you have a business relationship with any of your officers, directors, or trustees other than through their position as an officer, director, or trustee? If "Yes," identify the individuals and describe the business relationship with each of your officers, directors, or trustees. ☐ Yes ☑ No

c Are any of your officers, directors, or trustees related to your highest compensated employees or highest compensated independent contractors listed on lines 1b or 1c through family or business relationships? If "Yes," identify the individuals and explain the relationship. ☐ Yes ☑ No

3a For each of your officers, directors, trustees, highest compensated employees, and highest compensated independent contractors listed on lines 1a, 1b, or 1c, attach a list showing their name, qualifications, average hours worked, and duties.

b Do any of your officers, directors, trustees, highest compensated employees, and highest compensated independent contractors listed on lines 1a, 1b, or 1c receive compensation from any other organizations, whether tax exempt or taxable, that are related to you through **common control**? If "Yes," identify the individuals, explain the relationship between you and the other organization, and describe the compensation arrangement. ☐ Yes ☑ No

4 In establishing the compensation for your officers, directors, trustees, highest compensated employees, and highest compensated independent contractors listed on lines 1a, 1b, and 1c, the following practices are recommended, although they are not required to obtain exemption. Answer "Yes" to all the practices you use.

a Do you or will the individuals that approve compensation arrangements follow a conflict of interest policy? ☑ Yes ☐ No
b Do you or will you approve compensation arrangements in advance of paying compensation? ☑ Yes ☐ No
c Do you or will you document in writing the date and terms of approved compensation arrangements? ☑ Yes ☐ No

Part V	Compensation and Other Financial Arrangements With Your Officers, Directors, Trustees, Employees, and Independent Contractors *(Continued)*

d Do you or will you record in writing the decision made by each individual who decided or voted on compensation arrangements? ☑ Yes ☐ No

e Do you or will you approve compensation arrangements based on information about compensation paid by **similarly situated** taxable or tax-exempt organizations for similar services, current compensation surveys compiled by independent firms, or actual written offers from similarly situated organizations? Refer to the instructions for Part V, lines 1a, 1b, and 1c, for information on what to include as compensation. ☑ Yes ☐ No

f Do you or will you record in writing both the information on which you relied to base your decision and its source? ☑ Yes ☐ No

g If you answered "No" to any item on lines 4a through 4f, describe how you set compensation that is **reasonable** for your officers, directors, trustees, highest compensated employees, and highest compensated independent contractors listed in Part V, lines 1a, 1b, and 1c.

5a Have you adopted a **conflict of interest policy** consistent with the sample conflict of interest policy in Appendix A to the instructions? If "Yes," provide a copy of the policy and explain how the policy has been adopted, such as by resolution of your governing board. If "No," answer lines 5b and 5c. ☑ Yes ☐ No

b What procedures will you follow to assure that persons who have a conflict of interest will not have influence over you for setting their own compensation?

c What procedures will you follow to assure that persons who have a conflict of interest will not have influence over you regarding business deals with themselves?

Note: A conflict of interest policy is recommended though it is not required to obtain exemption. Hospitals, see Schedule C, Section I, line 14.

6a Do you or will you compensate any of your officers, directors, trustees, highest compensated employees, and highest compensated independent contractors listed in lines 1a, 1b, or 1c through **non-fixed payments**, such as discretionary bonuses or revenue-based payments? If "Yes," describe all non-fixed compensation arrangements, including how the amounts are determined, who is eligible for such arrangements, whether you place a limitation on total compensation, and how you determine or will determine that you pay no more than reasonable compensation for services. Refer to the instructions for Part V, lines 1a, 1b, and 1c, for information on what to include as compensation. ☐ Yes ☑ No

b Do you or will you compensate any of your employees, other than your officers, directors, trustees, or your five highest compensated employees who receive or will receive compensation of more than $50,000 per year, through non-fixed payments, such as discretionary bonuses or revenue-based payments? If "Yes," describe all non-fixed compensation arrangements, including how the amounts are or will be determined, who is or will be eligible for such arrangements, whether you place or will place a limitation on total compensation, and how you determine or will determine that you pay no more than reasonable compensation for services. Refer to the instructions for Part V, lines 1a, 1b, and 1c, for information on what to include as compensation. ☐ Yes ☑ No

7a Do you or will you purchase any goods, services, or assets from any of your officers, directors, trustees, highest compensated employees, or highest compensated independent contractors listed in lines 1a, 1b, or 1c? If "Yes," describe any such purchase that you made or intend to make, from whom you make or will make such purchases, how the terms are or will be negotiated at **arm's length**, and explain how you determine or will determine that you pay no more than **fair market value**. Attach copies of any written contracts or other agreements relating to such purchases. ☐ Yes ☑ No

b Do you or will you sell any goods, services, or assets to any of your officers, directors, trustees, highest compensated employees, or highest compensated independent contractors listed in lines 1a, 1b, or 1c? If "Yes," describe any such sales that you made or intend to make, to whom you make or will make such sales, how the terms are or will be negotiated at arm's length, and explain how you determine or will determine you are or will be paid at least fair market value. Attach copies of any written contracts or other agreements relating to such sales. ☐ Yes ☑ No

8a Do you or will you have any leases, contracts, loans, or other agreements with your officers, directors, trustees, highest compensated employees, or highest compensated independent contractors listed in lines 1a, 1b, or 1c? If "Yes," provide the information requested in lines 8b through 8f. ☐ Yes ☑ No

b Describe any written or oral arrangements that you made or intend to make.

c Identify with whom you have or will have such arrangements.

d Explain how the terms are or will be negotiated at arm's length.

e Explain how you determine you pay no more than fair market value or you are paid at least fair market value.

f Attach copies of any signed leases, contracts, loans, or other agreements relating to such arrangements.

9a Do you or will you have any leases, contracts, loans, or other agreements with any organization in which any of your officers, directors, or trustees are also officers, directors, or trustees, or in which any individual officer, director, or trustee owns more than a 35% interest? If "Yes," provide the information requested in lines 9b through 9f. ☐ Yes ☑ No

Part V   **Compensation and Other Financial Arrangements With Your Officers, Directors, Trustees, Employees, and Independent Contractors** (Continued)

b Describe any written or oral arrangements you made or intend to make.

c Identify with whom you have or will have such arrangements.

d Explain how the terms are or will be negotiated at arm's length.

e Explain how you determine or will determine you pay no more than fair market value or that you are paid at least fair market value.

f Attach a copy of any signed leases, contracts, loans, or other agreements relating to such arrangements.

Part VI   **Your Members and Other Individuals and Organizations That Receive Benefits From You**

The following "Yes" or "No" questions relate to goods, services, and funds you provide to individuals and organizations as part of your activities. Your answers should pertain to past, present, and planned activities. (See instructions.)

1a In carrying out your exempt purposes, do you provide goods, services, or funds to individuals? If "Yes," describe each program that provides goods, services, or funds to individuals.   ☐ Yes   ☑ No

b In carrying out your exempt purposes, do you provide goods, services, or funds to organizations? If "Yes," describe each program that provides goods, services, or funds to organizations.   ☐ Yes   ☑ No

2 Do any of your programs limit the provision of goods, services, or funds to a specific individual or group of specific individuals? For example, answer "Yes," if goods, services, or funds are provided only for a particular individual, your members, individuals who work for a particular employer, or graduates of a particular school. If "Yes," explain the limitation and how recipients are selected for each program.   ☐ Yes   ☑ No

3 Do any individuals who receive goods, services, or funds through your programs have a family or business relationship with any officer, director, trustee, or with any of your highest compensated employees or highest compensated independent contractors listed in Part V, lines 1a, 1b, and 1c? If "Yes," explain how these related individuals are eligible for goods, services, or funds.   ☐ Yes   ☑ No

Part VII   **Your History**

The following "Yes" or "No" questions relate to your history. (See instructions.)

1 Are you a **successor** to another organization? Answer "Yes," if you have taken or will take over the activities of another organization; you took over 25% or more of the fair market value of the net assets of another organization; or you were established upon the conversion of an organization from for-profit to non-profit status. If "Yes," complete Schedule G.   ☐ Yes   ☑ No

2 Are you submitting this application more than 27 months after the end of the month in which you were legally formed? If "Yes," complete Schedule E.   ☐ Yes   ☑ No

Part VIII   **Your Specific Activities**

The following "Yes" or "No" questions relate to specific activities that you may conduct. Check the appropriate box. Your answers should pertain to past, present, and planned activities. (See instructions.)

1 Do you support or oppose candidates in **political campaigns** in any way? If "Yes," explain.   ☐ Yes   ☑ No

2a Do you attempt to **influence legislation**? If "Yes," explain how you attempt to influence legislation and complete line 2b. If "No," go to line 3a.   ☐ Yes   ☑ No

b Have you made or are you making an **election** to have your legislative activities measured by expenditures by filing Form 5768? If "Yes," attach a copy of the Form 5768 that was already filed or attach a completed Form 5768 that you are filing with this application. If "No," describe whether your attempts to influence legislation are a substantial part of your activities. Include the time and money spent on your attempts to influence legislation as compared to your total activities.   ☐ Yes   ☑ No

3a Do you or will you operate bingo or **gaming** activities? If "Yes," describe who conducts them, and list all revenue received or expected to be received and expenses paid or expected to be paid in operating these activities. **Revenue and expenses** should be provided for the time periods specified in Part IX, Financial Data.   ☐ Yes   ☑ No

b Do you or will you enter into contracts or other agreements with individuals or organizations to conduct bingo or gaming for you? If "Yes," describe any written or oral arrangements that you made or intend to make, identify with whom you have or will have such arrangements, explain how the terms are or will be negotiated at arm's length, and explain how you determine or will determine you pay no more than fair market value or you will be paid at least fair market value. Attach copies or any written contracts or other agreements relating to such arrangements.   ☐ Yes   ☑ No

c List the states and local jurisdictions, including Indian Reservations, in which you conduct or will conduct gaming or bingo.

Part VIII   Your Specific Activities *(Continued)*

4a Do you or will you undertake **fundraising**? If "Yes," check all the fundraising programs you do or will conduct. (See instructions.) ☑ Yes   ☐ No

☑ mail solicitations   ☑ phone solicitations
☑ email solicitations   ☑ accept donations on your website
☑ personal solicitations   ☑ receive donations from another organization's website
☐ vehicle, boat, plane, or similar donations ☑ government grant solicitations
☑ foundation grant solicitations   ☐ Other

Attach a description of each fundraising program.

b Do you or will you have written or oral contracts with any individuals or organizations to raise funds for you? If "Yes," describe these activities. Include all revenue and expenses from these activities and state who conducts them. Revenue and expenses should be provided for the time periods specified in Part IX, Financial Data. Also, attach a copy of any contracts or agreements.   ☐ Yes   ☑ No

c Do you or will you engage in fundraising activities for other organizations? If "Yes," describe these arrangements. Include a description of the organizations for which you raise funds and attach copies of all contracts or agreements.   ☐ Yes   ☑ No

d List all states and local jurisdictions in which you conduct fundraising. For each state or local jurisdiction listed, specify whether you fundraise for your own organization, you fundraise for another organization, or another organization fundraises for you.

e Do you or will you maintain separate accounts for any contributor under which the contributor has the right to advise on the use or distribution of funds? Answer "Yes" if the donor may provide advice on the types of investments, distributions from the types of investments, or the distribution from the donor's contribution account. If "Yes," describe this program, including the type of advice that may be provided and submit copies of any written materials provided to donors.   ☐ Yes   ☑ No

5 Are you **affiliated** with a governmental unit? If "Yes," explain.   ☐ Yes   ☑ No

6a Do you or will you engage in **economic development**? If "Yes," describe your program.   ☐ Yes   ☑ No
b Describe in full who benefits from your economic development activities and how the activities promote exempt purposes.

7a Do or will persons other than your employees or volunteers **develop** your facilities? If "Yes," describe each facility, the role of the developer, and any business or family relationship(s) between the developer and your officers, directors, or trustees.   ☑ Yes   ☐ No

b Do or will persons other than your employees or volunteers **manage** your activities or facilities? If "Yes," describe each activity and facility, the role of the manager, and any business or family relationship(s) between the manager and your officers, directors, or trustees.   ☐ Yes   ☑ No

c If there is a business or family relationship between any manager or developer and your officers, directors, or trustees, identify the individuals, explain the relationship, describe how contracts are negotiated at arm's length so that you pay no more than fair market value, and submit a copy of any contracts or other agreements.

8 Do you or will you enter into **joint ventures**, including partnerships or **limited liability companies** treated as partnerships, in which you share profits and losses with partners other than section 501(c)(3) organizations? If "Yes," describe the activities of these joint ventures in which you participate.   ☐ Yes   ☑ No

9a Are you applying for exemption as a childcare organization under section 501(k)? If "Yes," answer lines 9b through 9d. If "No," go to line 10.   ☐ Yes   ☑ No

b Do you provide child care so that parents or caretakers of children you care for can be **gainfully employed** (see instructions)? If "No," explain how you qualify as a childcare organization described in section 501(k).   ☐ Yes   ☐ No

c Of the children for whom you provide child care, are 85% or more of them cared for by you to enable their parents or caretakers to be gainfully employed (see instructions)? If "No," explain how you qualify as a childcare organization described in section 501(k).   ☐ Yes   ☐ No

d Are your services available to the general public? If "No," describe the specific group of people for whom your activities are available. Also, see the instructions and explain how you qualify as a childcare organization described in section 501(k).   ☐ Yes   ☐ No

10 Do you or will you publish, own, or have rights in music, literature, tapes, artworks, choreography, scientific discoveries, or other **intellectual property**? If "Yes," explain. Describe who owns or will own any copyrights, patents, or trademarks, whether fees are or will be charged, how the fees are determined, and how any items are or will be produced, distributed, and marketed.   ☐ Yes   ☑ No

Part VIII   Your Specific Activities *(Continued)*

11   Do you or will you accept contributions of: real property; conservation easements; closely held securities; intellectual property such as patents, trademarks, and copyrights; works of music or art; licenses; royalties; automobiles, boats, planes, or other vehicles; or collectibles of any type? If "Yes," describe each type of contribution, any conditions imposed by the donor on the contribution, and any agreements with the donor regarding the contribution.   ☐ Yes ☑ No

12a Do you or will you operate in a **foreign country** or **countries?** If "Yes," answer lines 12b through 12d. If "No," go to line 13a.   ☐ Yes ☑ No

  b Name the foreign countries and regions within the countries in which you operate.

  c Describe your operations in each country and region in which you operate.

  d Describe how your operations in each country and region further your exempt purposes.

13a Do you or will you make grants, loans, or other distributions to organization(s)? If "Yes," answer lines 13b through 13g. If "No," go to line 14a.   ☐ Yes ☑ No

  b Describe how your grants, loans, or other distributions to organizations further your exempt purposes.

  c Do you have written contracts with each of these organizations? If "Yes," attach a copy of each contract.   ☐ Yes ☐ No

  d Identify each recipient organization and any **relationship** between you and the recipient organization.

  e Describe the records you keep with respect to the grants, loans, or other distributions you make.

  f Describe your selection process, including whether you do any of the following:

   (i) Do you require an application form? If "Yes," attach a copy of the form.   ☐ Yes ☐ No

   (ii) Do you require a grant proposal? If "Yes," describe whether the grant proposal specifies your responsibilities and those of the grantee, obligates the grantee to use the grant funds only for the purposes for which the grant was made, provides for periodic written reports concerning the use of grant funds, requires a final written report and an accounting of how grant funds were used, and acknowledges your authority to withhold and/or recover grant funds in case such funds are, or appear to be, misused.   ☐ Yes ☐ No

  g Describe your procedures for oversight of distributions that assure you the resources are used to further your exempt purposes, including whether you require periodic and final reports on the use of resources.

14a Do you or will you make grants, loans, or other distributions to foreign organizations? If "Yes," answer lines 14b through 14f. If "No," go to line 15.   ☐ Yes ☑ No

  b Provide the name of each foreign organization, the country and regions within a country in which each foreign organization operates, and describe any relationship you have with each foreign organization.

  c Does any foreign organization listed in line 14b accept contributions earmarked for a specific country or specific organization? If "Yes," list all earmarked organizations or countries.   ☐ Yes ☐ No

  d Do your contributors know that you have ultimate authority to use contributions made to you at your discretion for purposes consistent with your exempt purposes? If "Yes," describe how you relay this information to contributors.   ☐ Yes ☐ No

  e Do you or will you make pre-grant inquiries about the recipient organization? If "Yes," describe these inquiries, including whether you inquire about the recipient's financial status, its tax-exempt status under the Internal Revenue Code, its ability to accomplish the purpose for which the resources are provided, and other relevant information.   ☐ Yes ☐ No

  f Do you or will you use any additional procedures to ensure that your distributions to foreign organizations are used in furtherance of your exempt purposes? If "Yes," describe these procedures, including site visits by your employees or compliance checks by impartial experts, to verify that grant funds are being used appropriately.   ☐ Yes ☐ No

Form **1023** (Rev. 6-2006)

Part VIII   Your Specific Activities *(Continued)*

15	Do you have a **close connection** with any organizations? If "Yes," explain.	☑ Yes	☐ No
16	Are you applying for exemption as a **cooperative hospital service organization** under section 501(e)? If "Yes," explain.	☐ Yes	☑ No
17	Are you applying for exemption as a **cooperative service organization of operating educational organizations** under section 501(f)? If "Yes," explain.	☐ Yes	☑ No
18	Are you applying for exemption as a **charitable risk pool** under section 501(n)? If "Yes," explain.	☐ Yes	☑ No
19	Do you or will you operate a **school**? If "Yes," complete Schedule B. Answer "Yes," whether you operate a school as your main function or as a secondary activity.	☑ Yes	☐ No
20	Is your main function to provide **hospital** or **medical care**? If "Yes," complete Schedule C.	☐ Yes	☑ No
21	Do you or will you provide **low-income housing** or housing for the **elderly** or **handicapped**? If "Yes," complete Schedule F.	☐ Yes	☑ No
22	Do you or will you provide scholarships, fellowships, educational loans, or other educational grants to individuals, including grants for travel, study, or other similar purposes? If "Yes," complete Schedule H.	☐ Yes	☑ No

Note: Private foundations may use Schedule H to request advance approval of individual grant procedures.

Part IX	Financial Data

For purposes of this schedule, years in existence refer to completed tax years. If in existence 4 or more years, complete the schedule for the most recent 4 tax years. If in existence more than 1 year but less than 4 years, complete the statements for each year in existence and provide projections of your likely revenues and expenses based on a reasonable and good faith estimate of your future finances for a total of 3 years of financial information. If in existence less than 1 year, provide projections of your likely revenues and expenses for the current year and the 2 following years, based on a reasonable and good faith estimate of your future finances for a total of 3 years of financial information. (See instructions.)

A. Statement of Revenues and Expenses

	Type of revenue or expense	Current tax year (a) From 1/5/12 To 6/30/12	(b) From 7/1/12 To 6/30/13	(c) From 7/1/13 To 6/30/14	(d) From 7/1/14 To 6/30/15	(e) Provide Total for (a) through (d)
Revenues						
1	Gifts, grants, and contributions received (do not include unusual grants)		450,000	250,000		
2	Membership fees received					
3	Gross investment income					
4	Net unrelated business income					
5	Taxes levied for your benefit					
6	Value of services or facilities furnished by a governmental unit without charge (not including the value of services generally furnished to the public without charge)					
7	Any revenue not otherwise listed above or in lines 9–12 below (attach an itemized list)					
8	Total of lines 1 through 7					
9	Gross receipts from admissions, merchandise sold or services performed, or furnishing of facilities in any activity that is related to your exempt purposes (attach itemized list)			2,033,863	2,740,872	
10	Total of lines 8 and 9	0	450,000	2,283,863	2,740,872	
11	Net gain or loss on sale of capital assets (attach schedule and see instructions)					
12	**Unusual grants**					
13	Total Revenue Add lines 10 through 12	0	450,000	2,283,863	2,740,872	
Expenses						
14	Fundraising expenses					
15	Contributions, gifts, grants, and similar amounts paid out (attach an itemized list)					
16	Disbursements to or for the benefit of members (attach an itemized list)					
17	Compensation of officers, directors, and trustees					
18	Other salaries and wages		276,275	591,743	892,851	
19	Interest expense					
20	Occupancy (rent, utilities, etc.)		3,500	773,900	794,778	
21	Depreciation and depletion					
22	Professional fees		47,000	44,000	34,000	
23	Any expense not otherwise classified, such as program services (attach itemized list)		19,840	604,528	724,239	
24	Total Expenses Add lines 14 through 23	0	356,615	2,014,171	2,445,868	

Form **1023** (Rev. 6-2006)

Part IX Financial Data *(Continued)*

B. Balance Sheet (for your most recently completed tax year)		Year End: 1/31/12

Assets

			(Whole dollars)
1	Cash	1	0
2	Accounts receivable, net	2	0
3	Inventories	3	0
4	Bonds and notes receivable (attach an itemized list)	4	0
5	Corporate stocks (attach an itemized list)	5	0
6	Loans receivable (attach an itemized list)	6	0
7	Other investments (attach an itemized list)	7	0
8	Depreciable and depletable assets (attach an itemized list) . .	8	0
9	Land	9	0
10	Other assets (attach an itemized list)	10	0
11	Total Assets (add lines 1 through 10)	11	0

Liabilities

12	Accounts payable	12	0
13	Contributions, gifts, grants, etc. payable	13	0
14	Mortgages and notes payable (attach an itemized list)	14	0
15	Other liabilities (attach an itemized list)	15	0
16	Total Liabilities (add lines 12 through 15)	16	0

Fund Balances or Net Assets

17	Total fund balances or net assets	17	0
18	Total Liabilities and Fund Balances or Net Assets (add lines 16 and 17)	18	0

19 Have there been any substantial changes in your assets or liabilities since the end of the period shown above? If "Yes," explain. ☐ Yes ☑ No

Part X Public Charity Status

Part X is designed to classify you as an organization that is either a **private foundation** or a **public charity**. Public charity status is a more favorable tax status than private foundation status. If you are a private foundation, Part X is designed to further determine whether you are a **private operating foundation**. (See instructions.)

1a Are you a private foundation? If "Yes," go to line 1b. If "No," go to line 5 and proceed as instructed. If you are unsure, see the instructions. ☐ Yes ☑ No

b As a private foundation, section 508(e) requires special provisions in your organizing document in addition to those that apply to all organizations described in section 501(c)(3). Check the box to confirm that your organizing document meets this requirement, whether by express provision or by reliance on operation of state law. Attach a statement that describes specifically where your organizing document meets this requirement, such as a reference to a particular article or section in your organizing document or by operation of state law. See the instructions, including Appendix B, for information about the special provisions that need to be contained in your organizing document. Go to line 2. ☐

2 Are you a private operating foundation? To be a private operating foundation you must engage directly in the active conduct of charitable, religious, educational, and similar activities, as opposed to indirectly carrying out these activities by providing grants to individuals or other organizations. If "Yes," go to line 3. If "No," go to the signature section of Part XI. ☐ Yes ☐ No

3 Have you existed for one or more years? If "Yes," attach financial information showing that you are a private operating foundation; go to the signature section of Part XI. If "No," continue to line 4. ☐ Yes ☐ No

4 Have you attached either (1) an affidavit or opinion of counsel, (including a written affidavit or opinion from a certified public accountant or accounting firm with expertise regarding this tax law matter), that sets forth facts concerning your operations and support to demonstrate that you are likely to satisfy the requirements to be classified as a private operating foundation; or (2) a statement describing your proposed operations as a private operating foundation? ☐ Yes ☐ No

5 If you answered "No" to line 1a, indicate the type of public charity status you are requesting by checking one of the choices below. You may check only one box.

The organization is not a private foundation because it is:

a 509(a)(1) and 170(b)(1)(A)(i)—a church or a convention or association of churches. Complete and attach Schedule A. ☐

b 509(a)(1) and 170(b)(1)(A)(ii)—a **school**. Complete and attach Schedule B. ☑

c 509(a)(1) and 170(b)(1)(A)(iii)—a **hospital**, a cooperative hospital service organization, or a medical research organization operated in conjunction with a hospital. Complete and attach Schedule C. ☐

d 509(a)(3)—an organization supporting either one or more organizations described in line 5a through c, f, g, or h or a publicly supported section 501(c)(4), (5), or (6) organization. Complete and attach Schedule D. ☐

Part X **Public Charity Status** *(Continued)*

e 509(a)(4)—an organization organized and operated exclusively for testing for public safety. ☐

f 509(a)(1) and 170(b)(1)(A)(iv)—an organization operated for the benefit of a college or university that is owned or operated by a governmental unit. ☐

g 509(a)(1) and 170(b)(1)(A)(vi)—an organization that receives a substantial part of its financial support in the form of contributions from publicly supported organizations, from a governmental unit, or from the general public. ☐

h 509(a)(2)—an organization that normally receives not more than one-third of its financial support from gross **investment income** and receives more than one-third of its financial support from contributions, membership fees, and gross receipts from activities related to its exempt functions (subject to certain exceptions). ☐

i A publicly supported organization, but unsure if it is described in 5g or 5h. The organization would like the IRS to decide the correct status. ☐

6 If you checked box g, h, or i in question 5 above, you must request either an **advance** or a **definitive ruling** by selecting one of the boxes below. Refer to the instructions to determine which type of ruling you are eligible to receive.

a **Request for Advance Ruling:** By checking this box and signing the consent, pursuant to section 6501(c)(4) of the Code you request an advance ruling and agree to extend the statute of limitations on the assessment of excise tax under section 4940 of the Code. The tax will apply only if you do not establish public support status at the end of the 5-year advance ruling period. The assessment period will be extended for the 5 advance ruling years to 8 years, 4 months, and 15 days beyond the end of the first year. You have the right to refuse or limit the extension to a mutually agreed-upon period of time or issue(s). Publication 1035, *Extending the Tax Assessment Period,* provides a more detailed explanation of your rights and the consequences of the choices you make. You may obtain Publication 1035 free of charge from the IRS web site at *www.irs.gov* or by calling toll-free 1-800-829-3676. Signing this consent will not deprive you of any appeal rights to which you would otherwise be entitled. If you decide not to extend the statute of limitations, you are not eligible for an advance ruling. ☐

Consent Fixing Period of Limitations Upon Assessment of Tax Under Section 4940 of the Internal Revenue Code

For Organization

--   --   ------------------------
(Signature of Officer, Director, Trustee, or other   (Type or print name of signer)   (Date)
authorized official)

(Type or print title or authority of signer)

For IRS Use Only

--   ------------------------
IRS Director, Exempt Organizations   (Date)

b **Request for Definitive Ruling:** Check this box if you have completed one tax year of at least 8 full months and you are requesting a definitive ruling. To confirm your public support status, answer line 6b(i) if you checked box g in line 5 above. Answer line 6b(ii) if you checked box h in line 5 above. If you checked box i in line 5 above, answer both lines 6b(i) and (ii). ☐

(i) (a) Enter 2% of line 8, column (e) on Part IX-A. Statement of Revenues and Expenses. _____

(b) Attach a list showing the name and amount contributed by each person, company, or organization whose gifts totaled more than the 2% amount. If the answer is "None," check this box. ☐

(ii) (a) For each year amounts are included on lines 1, 2, and 9 of Part IX-A. Statement of Revenues and Expenses, attach a list showing the name of and amount received from each **disqualified person.** If the answer is "None," check this box. ☐

(b) For each year amounts are included on line 9 of Part IX-A. Statement of Revenues and Expenses, attach a list showing the name of and amount received from each payer, other than a disqualified person, whose payments were more than the larger of (1) 1% of line 10, Part IX-A. Statement of Revenues and Expenses, or (2) $5,000. If the answer is "None," check this box. ☐

7 Did you receive any unusual grants during any of the years shown on Part IX-A. Statement of Revenues and Expenses? If "Yes," attach a list including the name of the contributor, the date and amount of the grant, a brief description of the grant, and explain why it is unusual. ☐ **Yes** ☐ **No**

Part XI   User Fee Information

You must include a user fee payment with this application. It will not be processed without your paid user fee. If your average annual gross receipts have exceeded or will exceed $10,000 annually over a 4-year period, you must submit payment of $750. If your gross receipts have not exceeded or will not exceed $10,000 annually over a 4-year period, the required user fee payment is $300. See instructions for Part XI, for a definition of **gross receipts** *over a 4-year period. Your check or money order must be made payable to the United States Treasury. User fees are subject to change. Check our website at www.irs.gov and type "User Fee" in the keyword box, or call Customer Account Services at 1-877-829-5500 for current information.*

		Yes	No
1	Have your annual gross receipts averaged or are they expected to average not more than $10,000? If "Yes," check the box on line 2 and enclose a user fee payment of $300 (Subject to change—see above). If "No," check the box on line 3 and enclose a user fee payment of $750 (Subject to change—see above).	☐	☑
2	Check the box if you have enclosed the reduced user fee payment of $300 (Subject to change).		☐
3	Check the box if you have enclosed the user fee payment of $750 (Subject to change).		☑

I declare under the penalties of perjury that I am authorized to sign this application on behalf of the above organization and that I have examined this application, including the accompanying schedules and attachments, and to the best of my knowledge it is true, correct, and complete.

Please Sign Here ▶ X *(signature)*

(Signature of Officer, Director, Trustee, or other authorized official)

Dr. Howard Fuller   2-24-12   X

(Type or print name of signer)   (Date)

Director & Treasurer

(Type or print title or authority of signer)

Reminder: Send the completed Form 1023 Checklist with your filled-in-application.   Form **1023** (Rev. 6-2006)

Schedule B. Schools, Colleges, and Universities

If you operate a school as an activity, complete Schedule B

Section I	Operational Information

1a Do you normally have a regularly scheduled curriculum, a regular faculty of qualified teachers, a regularly enrolled student body, and facilities where your educational activities are regularly carried on? If "No," do not complete the remainder of Schedule B. — ☑ Yes ☐ No

b Is the primary function of your school the presentation of formal instruction? If "Yes," describe your school in terms of whether it is an elementary, secondary, college, technical, or other type of school. If "No," do not complete the remainder of Schedule B. — ☑ Yes ☐ No

2a Are you a public school because you are operated by a state or subdivision of a state? If "Yes," explain how you are operated by a state or subdivision of a state. Do not complete the remainder of Schedule B. — ☐ Yes ☑ No

b Are you a public school because you are operated wholly or predominantly from government funds or property? If "Yes," explain how you are operated wholly or predominantly from government funds or property. Submit a copy of your funding agreement regarding government funding. Do not complete the remainder of Schedule B. — ☑ Yes ☐ No

3 In what public school district, county, and state are you located?

4 Were you formed or substantially expanded at the time of public school desegregation in the above school district or county? — ☐ Yes ☐ No

5 Has a state or federal administrative agency or judicial body ever determined that you are racially discriminatory? If "Yes," explain. — ☐ Yes ☐ No

6 Has your right to receive financial aid or assistance from a governmental agency ever been revoked or suspended? If "Yes," explain. — ☐ Yes ☐ No

7 Do you or will you contract with another organization to develop, build, market, or finance your facilities? If "Yes," explain how that entity is selected, explain how the terms of any contracts or other agreements are negotiated at arm's length, and explain how you determine that you will pay no more than fair market value for services. — ☐ Yes ☐ No

Note. Make sure your answer is consistent with the information provided in Part VIII, line 7a.

8 Do you or will you manage your activities or facilities through your own employees or volunteers? If "No," attach a statement describing the activities that will be managed by others, the names of the persons or organizations that manage or will manage your activities or facilities, and how these managers were or will be selected. Also, submit copies of any contracts, proposed contracts, or other agreements regarding the provision of management services for your activities or facilities. Explain how the terms of any contracts or other agreements were or will be negotiated, and explain how you determine you will pay no more than fair market value for services. — ☐ Yes ☐ No

Note. Answer "Yes" if you manage or intend to manage your programs through your own employees or by using volunteers. Answer "No" if you engage or intend to engage a separate organization or independent contractor. Make sure your answer is consistent with the information provided in Part VIII, line 7b.

Section II	Establishment of Racially Nondiscriminatory Policy

Information required by **Revenue Procedure 75-50.**

1 Have you adopted a racially nondiscriminatory policy as to students in your organizing document, bylaws, or by resolution of your governing body? If "Yes," state where the policy can be found or supply a copy of the policy. If "No," you must adopt a nondiscriminatory policy as to students before submitting this application. See Publication 557. — ☐ Yes ☐ No

2 Do your brochures, application forms, advertisements, and catalogues dealing with student admissions, programs, and scholarships contain a statement of your racially nondiscriminatory policy? — ☐ Yes ☐ No

a If "Yes," attach a representative sample of each document.

b If "No," by checking the box to the right you agree that all future printed materials, including website content, will contain the required nondiscriminatory policy statement. ▶ ☐

3 Have you published a notice of your nondiscriminatory policy in a newspaper of general circulation that serves all racial segments of the community? (See the instructions for specific requirements.) If "No," explain. — ☐ Yes ☐ No

4 Does or will the organization (or any department or division within it) discriminate in any way on the basis of race with respect to admissions; use of facilities or exercise of student privileges; faculty or administrative staff; or scholarship or loan programs? If "Yes," for any of the above, explain fully. — ☐ Yes ☐ No

Schedule B. Schools, Colleges, and Universities *(Continued)*

5   Complete the table below to show the racial composition for the current academic year and projected for the next academic year, of: (a) the student body, (b) the faculty, and (c) the administrative staff. Provide actual numbers rather than percentages for each racial category.

If you are not operational, submit an estimate based on the best information available (such as the racial composition of the community served).

Racial Category	(a) Student Body		(b) Faculty		(c) Administrative Staff	
	Current Year	Next Year	Current Year	Next Year	Current Year	Next Year
Total						

6   In the table below, provide the number and amount of loans and scholarships awarded to students enrolled by racial categories.

Racial Category	Number of Loans		Amount of Loans		Number of Scholarships		Amount of Scholarships	
	Current Year	Next Year	Current Year	Next Year	Current Year	Next Year	Current Year	Next Year
Total								

7a Attach a list of your incorporators, founders, board members, and donors of land or buildings, whether individuals or organizations.

b   Do any of these individuals or organizations have an objective to maintain segregated public or private school education? If "Yes," explain.   ☐ Yes   ☐ No

8   Will you maintain records according to the non-discrimination provisions contained in Revenue Procedure 75-50? If "No," explain. (See instructions.)   ☐ Yes   ☐ No

Form **1023** (Rev. 6-2006)

Quest Organizational Structure

Quest Board of Directors

Dr. Robert Davis – Chair and Community Engagement
Dr. Howard Fuller – Educational Policy
Dr. Deborah McGriff – Academic Achievement

Executive Director

School Director

6 Subject Area Teachers

Dean of Students

Curriculum Coach & School Counselor

Instructional Advisors

Finance

Human Capital

Information Technology

Development

Quest School

Quest Center of Support

2014-15

Quest Administrative Structure Phase 2

School #1 6th through 8th	School #2 6th through 12th	CMO Shared Organizational Functions and Units

Schools

School Director

School Director

Dean of Students

Dean of Students

Curriculum Coach

Curriculum Coach

Administrative Assistant

Administrative Assistant

School Leadership Team
Chair: Executive Director

Discipline and School Culture Team
Chair: Director of School Services

Data Driven Instruction and Curriculum
Team, Chair: Director of School Services

School Operations Team
Chair: Director of Management Services

Executive Director

Director of School Services

Director of Management Services

Quest

Unanimous written resolution of

the Board of Directors

We the undersigned, being all of the Directors of Quest Milwaukee, Inc. (Quest), a corporation duly formed under Wisconsin law, do hereby adopt the following resolution as a valid and effectual resolution, passed at a Board of Directors meeting of Quest, convened for the purpose of conducting the business of Quest.

Approval of Charter Application Documents

Whereas; the Milwaukee Common Council, via the Milwaukee Charter School Review Committee require written documentation of certain key school procedures, and

Whereas; Quest intends to submit an application to establish a charter school in the 2013-2014 school year,

It was resolved that effective January 18th, 2012; the Quest Board of Directors approves the following documents:

- Quest Personnel Policies and Procedures Manual,
- Quest Operations Manual,
- Quest Parent Handbook,
- Quest Financial Policies and Procedures Manual, and
- Quest IDEA Policy and Procedures.

Furthermore, the Board instructs the Quest Executive Director to include these documents as part of the anticipated Quest Charter School Application to the City of Milwaukee.

Board Chair: _____ (Robert Davis)

Board Member: _____ (Howard Fuller)

Board Member: _____ (Deborah McGriff)

Quest Personnel Policies and Procedures Handbook

Table of Contents

Introduction

Quest Milwaukee, Incorporated; ("Quest ") has adopted certain employment policies and procedures, which are contained in this personnel handbook. This personnel handbook is effective as of the 1st day of July 1st, 2013.

The policies in this handbook are a source of information for employees who have questions about Quest's personnel practices. These policies are not contractual in nature and may be unilaterally rescinded, revised, or added to by Quest from time to time. Additionally, although management generally will follow these policies, the Executive Director may, in his or her sole discretion, authorize deviations from or exceptions to these policies if, in the Executive Director's opinion, such a deviation or exception is warranted under the circumstances. The provisions of this handbook rule over any contrary statements, representations, or assurances by any supervisory personnel.

This handbook is not to be construed as, or declared to be a contract of employment by any employee of Quest. Absent a written contract, Quest is an at-will employer. As an at-will employee, any employee may voluntarily leave employment or may be terminated by Quest at any time, for any or no reason, with or without notice.

This personnel handbook is the property of Quest. All employees and interns will be provided with a copy of the handbook and will be required to read and abide by it. While Quest intends to notify employees whenever there has been a significant modification or addition to any of the policies in the handbook, the policies are subject to change at any time, with or without notice, at Quest's sole discretion. When those changes occur, the employees become responsible to abide the new rules or changes revised or written by the Executive Director and/or Quest Board of Directors.

Quest is a network of schools, unified and supported by a Center of Support. Schools are led by School Directors and the Center of Support (CoS) is led by the Executive Director. Implementation of this document is ultimately the responsibility of the Executive Director, for CoS employees, and each School Director, for school-based employees.

Recruitment, Sourcing, and Selection of Employees

The Quest CoS has the responsibility of developing and maintaining the network talent pipeline. Quest will develop and maintain a highly selective hiring process to ensure that the best available employees are brought into the organization. For each open position, a qualified pool of candidates will be created to ensure that enough qualified candidates are available for that position. This will allow Quest management to select from the very best of these candidates to fill positions.

To aid in this effort, Quest may from time to time utilize the services of a Human Resources consultant to facilitate the recruitment and sourcing of employees. At the time that the opening becomes known, the ED will establish if the recruitment activities will be facilitated internally or through the use of the aforementioned consultant.

In February or March of each year, as part of the annual evaluation process, all employees at each school should have the opportunity to declare their intention to return to the network for another year, after summer break or if they intend to take a position with another organization.

Based on the number of positive indications during this process and on-going human capital planning, Quest management will then determine the hiring forecast for the upcoming school year. The hiring forecast should be shared with the Director of Finances to ensure that it align with enrollment and revenue projections for the coming year.

Employee selection will accomplished through the following steps:
- Initial Screen – to ensure that each candidate meets the minimum requirements and they have a general understanding of the learning philosophy of Quest,
- 1st Interview – to ensure that the candidate is a fit for Quest and they have a full understanding of the learning philosophy of Quest,
- Performance – to 'see' how the candidate interacts with other staff members (if the position is a teaching position, the candidate will be asked to present a 15 minute lesson),
- 2nd Interview – to see how they mesh with other staff members,
- Employment offer, contingent upon successful background check.

These steps will be done within the context of Quest's overall employment hiring and retention requirements.

Employee Hiring & Retention Requirements

Employment Categories
- Employees working 40 hours or more in a week are considered full time employees.
- Employees working less than 40 hours per week are considered part time employees.
- Faculty (Teaching staff)
- Non-Faculty (Professional, Non-teaching staff)

Hiring and Rehiring Standards
Quest believes that the quality of the professional staff largely determines the quality of education offered in our schools. It is therefore the responsibility of the Executive Director or his/her designee to locate, recruit and rehire the best-qualified teaching staff to meet schools' educational needs.

The hiring manager or his/her designee will evaluate the candidates and make recommendations to the School Director for the first interview. After the first interview, the department head will give their recommendations to the Executive Director or his/her designee regarding the second interview.

The Quest Board of directors has the right to hire or terminate a contract without the involvement of school administration. Quest is committed to hire/rehire the individuals who are best qualified for the job without regard to race, sex, religion, nationality or handicap unrelated to the job.

Faculty evaluation and selection shall be based on:

- Strong academic preparation,
- Professional competence,
- Intellectual rigor,
- Emotional maturity,
- Enthusiastic professional attitude,
- Knowledge of instructional practices,
- Ability to contribute to the furtherance of the networks educational goals.

Technical Support Employees evaluations will be based on:

- Professional competence,
- Emotional maturity,
- Enthusiastic professional attitude,
- Knowledge of specific processes,
- Ability to contribute to the furtherance of the networks overarching goals.

Non-Faculty evaluations will be based on:

- Professional competence,
- Emotional maturity,
- Enthusiastic professional attitude,
- Ability to contribute to the overall success of the networks goals.

Management evaluations will be based on:

- Professional competence,
- Emotional maturity,
- Enthusiastic professional attitude,
- Proven ability to innovate and implement innovation,
- Successful track record of management and leadership,
- Ability to contribute to the overall success of the network's goals.

Attention shall be paid, among other factors, to the candidate's academic records, and his/her previous relevant experience. Teachers, who graduated in the upper third of their classes, will be given priority in hiring, unless they graduated from a performance-based college. In this case, feedback regarding their performance on competency assessments will be part of the hiring decision.

All staff must demonstrate an awareness of the fact that children have many different family circumstances and be willing and able to provide the educational, emotional, and compassionate, and consistent support that a diverse student population needs in school.

Evaluations

The Quest faculty members must fulfill their individual responsibilities and effectively collaborate with other members of the teaching and support teams. The School Director (at schools) and the Executive Director (at the Center of Support or his/her designee) will be responsible for the evaluation of employees.

Evaluations should be conducted in February or March. For teaching staff, observations and student data should be part of their overall evaluation. The observation rubric should be handled in such a way that teaching staff have the opportunity to reflect on their overall performance, along with the School Director. These two will then compare their perspectives and attempt to reach consensus on each teacher's areas of strengths and areas that need improvement.

Based on all evaluations performed for the academic staff, the School Director must make a recommendation to the Board for which staff members will be extended a contract in the following school year. The recommendations must be in writing with the evaluation rubric as backup. The Board may request additional information in making their decision. In May of each year, all staff should learn if a contract will be extended to them for the next school year.

Salary Compensation

The compensated amount will be prorated and paid in 24 semi-monthly installments on the 15th and the last day of each calendar month through the term of the contract. If these days fall on a Saturday, the employee will be paid on the Friday prior. If the day falls on a Sunday, the employee will be paid the following Monday. The first payment will be distributed on September 15. The last payment will be distributed on August 31st. The Quest School Board has the right to change the paycheck schedule.

The Employee's last paycheck for each quarter shall be issued by Quest only upon the receipt of all required documents from the Employee, including but not limited to, student grades, class lesson plans, student homework assignments, and/or as may be identified in the Employee's orientation packet, as directed by the Executive Director or his/her designee. The Employee retains sole responsibility for ensuring that required documents are submitted as required.

Licensure and Background Check

As applicable to Faculty positions, the Employee hereby represents and warrants to Quest that he/she is a professionally trained Employee and appropriately licensed by the Wisconsin Department of Public Instruction to perform in the position of Employment for Quest. And, that:

- The Employee agrees to provide Quest with a copy of his/her license(s) and transcripts.
- The Employee understands that he/she retains sole responsibility for maintaining the proper licensure/certifications at all times and ensuring that the proper documentation is on file with the Executive Director or his/her designee.
- The Employee has to present original copies of the proper licensure/certification to their supervisor before the contract can be signed.
- The Employee further understands that this employment contract will become immediately null and void if the Employee fails to have such proper documentation on file with Quest as required.

Emergency Licenses

If no suitable, licensed teaching candidates exist for an opening, Quest will consider requesting an emergency license for a teacher who has content knowledge in the academic area of need and who

otherwise would be a suitable candidate. The application and administration of this request will be conducted within the DPI guidelines, using form PI-1602-EL or the appropriate DPI form, at the time of the request. In this instance, preference will be given to candidates with the shortest route to licensure.

The candidate under consideration must be in a program leading toward certification or be willing to enter into such a program immediately. Within 30 days of employment an achievable plan must be submitted to the School Director that clearly will result in regular certification within 2 years. This plan will be reviewed as part of the evaluation and contracting process.

To ensure that this plan is being executed, it is the teacher's responsibility to submit to their Director any transcripts, schedules and/or proof of payment, that substantiates their continued enrollment in programs that support their certification plan. Any teacher who is in danger of not being certified according their plan will not be recommended contract renewal.

License Expirations

The CoS will maintain an electronic calendar of expiration dates for licenses. The calendar will shared with School Directors and will provide them with timely reminders. Employees will be given advance warning of license expiration, through their School Director, and through the CoS.

Teachers who allow their licenses to expire will receive a series of warnings, including a termination letter, with termination contingent upon the employee providing proof that they have applied for license renewal or the CoS ability to verify license renewal through the DPI website.

The Employee must have a background check conducted and on file as a condition of employment and reviewed by the Executive Director or his/her designee. Any employment offer is consider contingent upon the acceptable results of the licensure and background check. Background checks will be performed at least every 3 years on all employees who have contact with students.

Employment Status

In the absence of a written employment contract, employment with Quest is terminable at will, meaning that the employment relationship can be terminated by Quest at any time, with or without notice and with or without cause. The at-will nature of an individual's employment with Quest may not be modified except by a written document approved by the Executive Director. Any expressed or implied agreements or assurances concerning the terms, conditions, or duration of an individual's employment with Quest are not binding upon Quest unless they are in writing, approved by the Executive Director.

Quest will maintain a database of all employee certifications and licenses. From time to time, Quest may provide a written reminder to employees regarding an expiring license. However, it is always the employees' responsibility to ensure that needed certifications and licenses are up to date and available for review by the Executive Director or his/her designate.

Quest is committed to employing only United States citizens and aliens who are authorized to work in the United States and does not unlawfully discriminate on the basis of citizenship or national origin. In compliance with the Immigration Reform and Control Act of 1986, as amended, each new employee, as

a condition of employment, must complete the Employment Eligibility Verification Form I-9 and present documentation establishing identity and employment eligibility.

If an employee is authorized to work in this country for a limited time period, the individual will be required to submit proof of renewed employment eligibility prior to expiration of that period to remain employed by Quest. Former employees who are rehired must also complete the form if they have not completed an I-9 with Quest within the past three years, or if their previous I-9 is no longer retained or valid. Employees with questions or seeking more information are encouraged to contact the Executive Director.

Working Hours, Overtime, Check In Policy, and Late Arrivals
This section applies to school-based employees.

Working Hours: The Employee will work a minimum of 40 hours per week during the contract term; including a thirty (30) minute daily lunch break to be scheduled as determined by the School Director or his/her designee, maintaining the following schedule:

Monday:	8:00 am - 4: 00 pm	8 hrs
Tuesday:	8:00 am - 4: 00 pm	8 hrs
Wednesday:	8:00 am - 4: 00 pm	8 hrs
Thursday:	8:00 am - 4: 00 pm	8 hrs
Friday:	8:00 am - 4: 00 pm	8 hrs

Overtime: Under Wisconsin DWD Ch. 274, Quest falls under the 'exempt' category concerning overtime. This defines Quest, a registered Non-profit organization as exempt from having to pay out overtime monies.

Check In Policy: All employees should arrive at school by or before 8:00 AM and leave no earlier than 4:00 PM. If you come late to work with an excused absence from the Executive Director or his designee(s), make sure you are making up that lost time in the afternoon.

Late Arrivals: If the Employee arrives later than 8:00 am, he or she will be accepted as tardy. The employee can be late three times per academic year, not exceeding 15 minutes. Repeated, unexcused tardiness (four times or more) may result in disciplinary actions, including but not limited to: salary deduction, suspension without pay, or termination of employment. (This course of action will be determined by the School Director, and will consider the employee's attendance history, job performance, and circumstances of the tardiness).

An example of the formula for salary deduction is as follows: All employees must call in when they become aware of the fact that they will be late for work. For the first fifteen minutes of an employee's absence, 1/4 of that employee's salary will be deducted from their daily salary. After half an hour (1/2) hour of absence, an employee will lose a 1/2 day of pay, after two (2) hours of absence; an employee will lose an entire day of pay. If a substitute must be hired/used to replace an employee, the substitute's hourly wage will be deducted from the employee's salary, which is being replaced in addition to above deductions.

Equal Employment Opportunity

Since we are an equal opportunity employer, all employees and prospective employees will be recruited, selected and trained without regard to age, sex, race, color, religion, disability, national origin, marital status or veteran status. This same non-discriminatory consideration will be used in all other aspects of the employment relationship.

All applicants are carefully screened and full consideration is given to their training, education, skills, experiences, growth, potential, and previous work record. All employees of Quest are charged with fulfilling their responsibilities for the active support of our equal employment opportunity program.

Accommodations for Disabilities

If the employee has a disability which affects his/her ability to perform the essential job duties, the employee should contact their supervisor to discuss what reasonable accommodations might be made for the employee to safely and effectively perform his/her job. A statement from the employee's physician describing the extent of the disability and limitations will be necessary in order for the school or CoS to assess whether it can reasonably accommodate the employee's condition.

Harassment Policy Statement

Harassment Prohibited — General: Quest is committed to maintaining a professional and collegial work environment that is free of discrimination and harassment based on a person's sex, race, color, age, religion, disability, ancestry, or national origin, consistent with applicable federal and state laws.

All employees should respect the rights, opinions, and beliefs of others. Harassment of any person because of sex, race, color, age, religion, disability, ancestry, or national origin is strictly prohibited, whether directed at a student, coworker, visitor or Administrator. Any such harassment is prohibited by this policy, without regard to whether or not it also violates any equal employment opportunity laws. This policy applies to all employees of Quest, and applies to the workplace; to job assignments out of the office, at school-sponsored functions and activities, and anywhere else.

Sexual Harassment Prohibited: No one may threaten or imply that an employee's submission to or rejection of sexual advances will in any way influence any decision about that employee's employment, advancement, duties, compensation, or any other terms or conditions of employment. No one may take any personnel action based on an employee's submission to or rejection of sexual advances. No one may threaten or imply that a student's submission to or rejection of sexual advances will influence any decision about the student.

No one may subject another employee, student or visitor to any unwelcome conduct of a sexual nature. This includes both unwelcome physical conduct, such as touching, making sexual gestures, and making or displaying sexual drawings or photographs, and unwelcome verbal conduct, such as sexual propositions, slurs, insults, jokes and other sexual comments. An employee's conduct will be considered unwelcome and in violation of this policy when the employee knows or should know it is unwelcome to the person subjected to it or when it substantially interferes with an individual's employment, a student's schooling or well-being or creates an intimidating, hostile, or offensive work environment.

Other Harassment Prohibited: No one may harass anyone because of that person's race, color, age, religion, disability, ancestry, or national origin. Some examples of conduct prohibited by this policy include using racial and ethnic slurs or offensive stereotypes and making jokes about these characteristics.

Making Complaints and Reporting Violations: Any employee who believes he or she is a victim of unlawful harassment or has witnessed such harassment should contact their supervisor immediately. If their supervisor is the alleged source of harassment, the employee should inform the supervisor's manager. If this is not possible, a Board member should be notified.

No reprisal, retaliation, or other adverse action will be taken against any employee for making a good faith complaint or report of harassment, or for assisting in the investigation of any such complaint or report. Any suspected retaliation or intimidation should be reported immediately to their supervisor. Any individual found to have retaliated against an individual for making a complaint or report under this policy, or against anyone participating in the investigation of a complaint under this policy, may be subject to discipline up to and including termination.

Investigation of Complaints and Reports: Quest will promptly and thoroughly investigate any complaint or report of a violation of this policy. Please understand that a thorough investigation can, in some cases, take several weeks. During the pendency of the investigation, to the extent possible, measures will be taken to prevent any further contact or interaction between the person who believes he or she has been subject to harassment and the alleged violator of this policy. At any time, the employee may ask the person to whom he/she made a complaint or report under this policy about the status of the investigation. While it is the intent of Quest to attempt to keep any complaints or reports under this policy as confidential as possible, in order to ensure a fair and thorough investigation, complete confidentiality may not be possible. However, all persons with whom the allegations are discussed will be reminded of the confidential nature of the process.

Penalties for Violations: Quest will take prompt and appropriate disciplinary and remedial action if its investigation shows a violation of this policy. Depending on the circumstances, the disciplinary action may range from a warning to discharge.

A complaint or report that this policy has been violated is a serious matter. Dishonest complaints or reports are also against our policy. Quest will take appropriate disciplinary action up to and including termination if its investigation shows that deliberately dishonest and bad faith accusations have been made.

Additional Information: Quest has developed this policy to ensure that all of its employees, students and visitors can work in an environment free from unlawful harassment. This policy will be disseminated to all current employees as well as to all new employees, upon their hiring by Quest. Quest will periodically conduct mandatory informational sessions concerning the policy, so as to ensure that all employees understand the School's commitment to eliminating any unlawful harassment in the School, are familiar with the policy and its complaint procedures, and know that any complaint received will be investigated promptly and appropriately resolved.

If the employee has any questions about this policy, please contact a School Director or the Executive Director, for additional information. All employees are expected to act responsibly to establish a pleasant working environment free of discrimination and harassment.

Anti-Violence Policy

Violence or threats of violence will not be tolerated. If the employee feels such conduct has occurred, please report it immediately to the School Director or the Executive Director.

The matter will be investigated, and where investigation confirms the allegation, appropriate action will be taken. Any employee engaging in what the school deems to be violent or threatening behavior will be subject to disciplinary action, up to and including discharge.

The school premises of Quest represent school safety zones, on which the possession of a deadly weapon or dangerous ordnance is strictly prohibited. As part of this policy, Quest will not tolerate the possession of weapons or any other device designed to inflict serious bodily harm by any employee of Quest while on school property, at the CoS, on a school vehicle or at a school sponsored event.

Any employee found in possession of such a device on Quest premises, the CoS, in a School vehicle, or at a School-sponsored event, will be disciplined (up to and including possible termination) and will be reported to the appropriate law enforcement agency if appropriate.

An employee who is authorized by the School and by the law to serve as a security officer or to carry a weapon under controlled circumstances is exempt from this policy.

The following are examples of prohibited conduct under this policy:

- Injuring another person physically,
- Engaging in behavior that creates reasonable fear of injury to another person,
- Possessing, brandishing, or using a weapon on School premises or engaged in Quest business,
- Damaging property intentionally,
- Threatening to injure an individual or damage property, or
- Committing injurious acts motivated by or related to domestic violence or sexual harassment.

Every employee has an obligation to report potential workplace violence to their supervisor. This would include if the employee hears or observes anyone exhibiting one or more of the following behaviors:

- Discussing weapons or bringing weapons into the workplace,
- Displaying overt signs of hostility or anger ,
- Making threatening remarks,
- Sudden or significant deterioration of performance , or
- Displaying irrational or inappropriate behavior.

It is extremely important that the employee reports any knowledge of actual or potential acts of violence to their supervisor so that all can be assured of a working and learning and working environments free of fear and violence.

To protect property and ensure the safety of all employees, students and visitors, Quest reserves the right to conduct personal searches consistent with state law, and to inspect any packages, parcels, purses, handbags, briefcases, lunch boxes or any other possessions, articles or property carried to Quest's property. Quest reserves the right to search any employee's desk, office, locker, file or computer or any other area of the premises. Inspection may be conducted at any time at the discretion of Quest.

Persons entering the premises who refuse to cooperate with an inspection conducted pursuant to Quest's policy may not enter the premises, and employees refusing to cooperate may be subject to disciplinary measures, up to and including discharge.

Drug-Free Workplace

Quest believes that a quality education is not possible in an environment affected by drugs. It will seek, therefore, to establish and maintain settings which are not tainted by the use or evidence of use of any controlled substance.

Quest shall not permit the manufacture, possession, use (except self-use of prescription drugs), distribution, or dispensing of any controlled substance, including alcohol, prescription and non-prescription medicine by any employee at any time while on school property or at the CoS while involved in any school-related or work-related activity or event. Any employee who violates this policy shall be subject to disciplinary action in accordance with Quest policy. Quest reserves the right to implement a drug testing policy in accordance with applicable law at any time in its sole discretion.

Employee Discipline

Quest retains its right to discipline or terminate the employment of any employee at any time, with or without cause at Quest's sole discretion.

These policies apply to all employees of Quest, including certified, classified, and administrative personnel, and apply to all job-related activities of such employees.

Bases for Disciplinary Action: The following acts or omissions, among others, which evidence unfitness to perform duties, by an employee in the scope of employment, shall constitute grounds for disciplinary action up to and including termination:

1. Corporal punishment of students.
2. Misconduct related to the employee's job.
3. Conduct in violation of any Quest policy or established expectation of performance.
4. Improper conduct toward students and/or other employees.
5. Harassment.
6. Sexual Misconduct.
7. Insubordination, including the willful refusal of an employee to perform an assignment or to comply with a directive given by the employee's supervisor.
8. Falsification of records or data with intent to defraud.

9. The use or distribution of being under the influence of alcohol or other intoxicants or illegal narcotics, or other controlled substances without prescription on school property or at any school function.

10. Possession of alcohol or other intoxicants or illegal narcotics, or other controlled substances without prescription on school property or at any school function.

11. Verbal and/or physical fighting on school premises or at any school related activities.

12. Dishonesty or falsification of any information involving Quest, including grades, credits, data on forms, employee records, or any other information involving Quest.

13. Conviction of a felony related to the employee's employment, or which seriously impairs the employee's ability to perform his or her assigned duties.

14. Negligent or willful damage to Quest property.

15. Gross waste of Quest supplies or equipment.

16. Unprofessional job-related conduct.

17. Incompetence or inefficiency in the performance of duties as identified through due process procedures.

18. Use of Quest property for personal gain.

19. Abuse of the Quest's sick and personal leave policy.

20. Excessive and/or unexcused tardiness.

21. Unexcused absences from work and assigned duties.

22. Negligence or carelessness in the performance of duties.

23. Deliberate conduct, which has the apparent purpose of, exposing Quest to embarrassment, censure, ridicule, or reproach.

This list is not a complete list of acts worthy of disciplinary action. The Executive Director and School Director reserve the right to determine when disciplinary action is appropriate and the degree of disciplinary action to be administered, including termination. Persons Authorized to Initiate and Carry Out Disciplinary Actions:

*   Verbal and written warnings may be issued by the Board of Directors, the Executive Director, School Director, administrators, or other supervisory personnel relative to employees under their jurisdiction.

*   Suspension Without Pay and Notice of Intent to Dismiss. Suspension without pay and notice of intent to dismiss may be administered both by the School Director and the Executive Director and may occur in those instances in which:

    o   The misconduct is sufficiently serious as determined by the School Director or Executive Director to warrant the initiation of disciplinary action at this level, without prior disciplinary action.

    o   Previous warnings were given and found to be ineffective to cause correction of the offensive conduct.

    o   Remediation efforts have failed.

    o   The nature of the offensive conduct is such that dismissal appears to be the only solution to the problem.

Employee On-Boarding

The following topics are all be part of the employee on boarding process. Each employee will receive this information as part of their employment orientation process. If an employee has any questions about any of these topics, they should contact their supervisor for an explanation and clarification.

Code of Ethics

An effective educational program requires the services of men and women of integrity, high ideals, and human understanding. To maintain and promote these essentials, Quest expects all professional staff members to maintain high standards in their working relationships, and in the performance of their professional duties to:

  i. Recognize basic dignities of all individuals with whom they interact in the performance of duties;

  ii. Represent accurately their qualifications;

  iii. Exercise due care to protect the mental and physical safety of students, colleagues, and subordinates;

  iv. Understand and apply the knowledge and skills appropriate to assigned responsibilities;

  v. Keep in confidence legally confidential information as they may secure;

  vi. Ensure that their actions or those of another on their behalf are not made with specific intent or advancing private economic interests;

  vii. Refrain from using position or public property, or permitting another person to use an employee's position or public property for partisan political or religious purposes. (This will in no way limit constitutionally or legally protected rights as a citizen.);

  viii. Avoid accepting anything of value offered by another for the purpose of influencing judgment.

  ix. The Employee agrees to perform, at a professional level of competence, the services, duties, and obligations required by the rules, regulations, and existing policies of Quest or that may be hereinafter enacted by Quest.

  x. The Employee agrees to engage full time in the duties and responsibilities normally expected of the Employee position during the term of this handbook, and other duties as may be assigned. The Employee shall report directly to their supervisor or his/her designee, as required.

Conflicts of Interest

Employees have an obligation to avoid actual or potential conflicts of interest. An actual or potential conflict of interest occurs when an employee is in a position to influence a decision that may result in a personal gain for that employee, or for a relative, as a result of Quest's business dealings. For the purposes of this policy, a relative is any person who is related by blood or marriage, or whose relationship with the employee is similar to that of persons who are related by blood or marriage.

If an employee has any influence on transactions involving purchases, contracts, or leases, it is imperative that he or she disclose to the Quest Board, as soon as possible the existence of any actual or potential conflict of interest so that safeguards can be established to protect all parties. Personal gain may result not only in cases where an employee or relative has a significant ownership in a firm with which Quest does business but also when an employee or relative receives any gift or special consideration as a result of any transaction or business dealings involving Quest.

The materials, products, designs, plans, ideas, and data of Quest are the property of the network and should never be given to an outside firm or individual except through normal channels and with appropriate authorization. Any improper transfer of material or disclosure of information, even though it is not apparent that an employee has personally gained by such action, constitutes unacceptable conduct. Any employee who participates in such a practice will be subject to disciplinary action, up to and including immediate employment termination and/or possible legal action.

Confidential Matters

The protection of confidential school and student information is critical at Quest. Such confidential information includes, but is not limited, to the following examples:

- Student Data,
- Student and Parent Lists,
- School Financial Information,
- Conversations, letters, or memos regarding students, employees, parents, alumni, etc., or
- Any conversation regarding the above that may have been inadvertently overheard.

Any employee who discloses confidential school or student information will be subject to disciplinary action up to and including possible discharge. Maintaining the confidentiality of Quest's student and school information is an obligation, which also continues after any employee's termination.

Solicitation and Distribution

There will be no soliciting of employees by other employees or any person anywhere on Quest property unless prior approval is obtained in writing from the Executive Director. This includes selling and delivery of merchandise (e.g., Girl Scout cookies, Tupperware, or tickets to fundraising events) and/or the distribution of literature, petitions, etc.

Intellectual Property Rights

Any materials created by staff members for use by Quest, or produced using the staff or resources of Quest, are works-for-hire and all intellectual property rights are vested in Quest.

Internet Use

The Internet is a powerful communications tool and a valuable source of information. However, an employee's improper use of Internet services can waste time and resources and potentially create legal liability and embarrassment for both the School and the employee.

An Internet service includes, but is not limited to: e-mail, web browsing and newsgroups. This policy applies to any Internet service that is:

- Accessed on or from Quest 's premises; and/or
- Accessed using Quest computer equipment or via Quest-paid access methods.
- Internet services are provided by Quest for school use. Incidental use of Internet services for personal, non-work-related purposes is acceptable, however, personal use must be infrequent and must not:

- o Involve any prohibited activity, i.e., any activity that is prohibited by this handbook or by the application of state or federal law;
- o Interfere with the productivity of the employee or his/her co-workers;
- o Consume system resources or storage capacity on an ongoing basis; or
- o Involve large file transfers or otherwise deplete system resources available for business purposes.

Employees should not expect privacy with respect to any of their activities using Quest-provided Internet access or services. Quest reserves the right to search, review, or monitor any files, messages, or communications sent, received or stored on Quest's computer systems without advance notice and may also limit the use of the Internet service in part or whole.

Employees violating this policy are subject to discipline, up to and including termination of employment. Employees using the computer system for defamatory, illegal, or fraudulent purposes are also subject to civil liability and criminal prosecution. All computer resources including content are the property of the Quest and employees will be held personally responsible for their activities.

Employees should save soft copies of all classroom documents in a backup folder on their computer.

Employees are strictly prohibited from using Internet services in connection with any of the following prohibited activities:

- Engaging in illegal, fraudulent or malicious conduct;
- Working on behalf of other organizations;
- Sending or receiving offensive, obscene or defamatory material;
- Annoying or harassing other individuals;
- Sending uninvited e-mail of a non-work-related nature;
- Monitoring or intercepting the files or electronic communications of employees or third parties;
- Obtaining unauthorized access to any computer system (including but not limited to unauthorized use of codes or passwords);
- Using another individual's account or identity without explicit authorization;
- Attempting to test, circumvent, or defeat security or auditing systems of Quest or any other organization without prior authorization; or
- Distributing chain letters, jokes, solicitations, offers to buy or sell goods, or other non-business material of a trivial or frivolous nature.

General Duties

1. School-based employees are required to attend all faculty/staff/department/grade level meetings, open houses, fairs, fund raising events, parent teacher conferences, teacher orientation, student orientation, which shall be scheduled before, during, and after the period of student attendance, and any other type of meeting, as required and directed by the School Director or his/her designee.

Staff must attend the gatherings pertaining to her/him as listed above, unless given permission otherwise (not to attend), from the School Director or his/her designee.

The Employee must remain in faculty/staff/department/grade level meetings until she/he is dismissed. For meeting days employees need to stay until the end of the meeting, which should not exceed 5 p.m.; if the meeting exceeds 5p.m., the employees will be compensated $15 per hour.

2. Staff duties shall include, but not necessarily be limited to, attendance at all open houses and other school functions; communication with parents through conferences and other means; timely preparation of reports on students; and other such functions as may otherwise be directed from time to time.
3. The Employee shall always be familiar with and must comply with the general, educational, and personnel policies in existence, including the philosophies and goals of Quest, as amended from time to time.
4. Faculty is required to do lunch, morning duties and hallway supervisions. Employees given morning duty should be present at the assigned place at 7:50 AM at the latest and should serve till 8:20 am. The School Director or his designee will provide these schedules,
5. Faculty is required to facilitate their own detentions and inform the parents and administration prior to the detention.
6. The Employee is required to work a minimum of 40 hours per week including teaching, lunch duty, morning/hall duties, extracurricular activity and tutoring or any other duties assigned by the administration.
7. The Employee is required to take professional training programs focusing on any professional development program in his/her professional area. Their supervisor has the right to ask for verification if the training is scheduled during school or office hours.
8. The Employee should strictly follow due process. The Employee needs to write a referral to be able to send any student to see the Dean of Students. If the employee sends a student to the Dean without a written referral and/or without contacting the parent, the student will be put back into to the learning space by the administration and the employee may receive a referral due to skipping the due process policy procedure.
9. The Employee needs to keep records of phone calls and meeting minutes for the students who have discipline issues with the employee. The administration may ask for a copy of the records at any time.

Important Reminders for School-Based Employees
- Employees should check their mailboxes, voice mailboxes and e-mails at least three times per day: Morning, noon and afternoon is suggested.
- There will be no excuses accepted for not knowing information — unless due to verifiable IT or other technical malfunctions.
- Employees should direct immediate concerns to the supervisor or related administrative personnel.
- Employees must to be on time for all designated meetings. Any tardiness will be handled by their supervisors.

- Employees must refrain from smoking on school premises. Smoking is confined to the areas designated and identified. Employees should always be conscious of the need to be out of sight of the students when smoking.
- Employees are not allowed to leave the building other than during his/her lunch break, unless proper prior-permission is received from Administration.
- Employees should clean up after themselves in areas shared by staff.
- Employees should report all copy machine problems to the Administrative Assistant immediately. Employees should not try to fix the copy machine by himself/herself, unless they have attended the provided training. The copy room door should stay closed during school hours.
- If copy supplies are low (toner/supplies/paper) the Employee should notify the Administrative Assistant immediately.
- Employees should have all movies pre-approved by the appropriate department head and/or administration before showing them students. Sometimes, parental consent may also need to be obtained to allow students to view a particular movie. Check with administration if you have questions.
- Employees should apply intervention strategies before turning over discipline problems to administration, unless it is an emergency situation.
- Employees need to fill out an Absence Request Form at least a week before taking a personal day. If administration is not given at least one-week notice, the employee may not be allowed to take that personal day. This will be at the School Director or Executive Director's discretion. If the employee chooses to take the personal day anyway, the Executive Director or his/her designee has the right to take the necessary disciplinary actions. The disciplinary actions could include a written warning, a $250 deduction from the paycheck for each day, or a termination of the contract. All forms will be available in the main office and should be turned in to the employee's supervisor.
- Employees should fill out an Absence Form when a sick day is used. This form should be filled out the day the Employee returns and turned in to the employee's supervisor.
- Employees should not use cell phones during class time, assigned duties, or meetings. Employees should also refrain from using cellular phones in the hallways. While teaching, teacher's cell phones should be either turned off or on silent and should be put away out of sight.
- Employees should not chew gum or drink beverages in front of the students.

Lunch Duty
- Staff assigned to breakfast/lunch duty should not congregate together and talk; they should be walking/observing students during the lunch periods.
- Staff assigned to breakfast/lunch duty should not allow students to leave the cafeteria area without permission.
- During passing periods, employees should stand in the hallways or by their doors and monitor hallway activities.

- Staff assigned to breakfast/lunch duty should keep students out of the office if they do not have a pass.
- Staff assigned to breakfast/lunch duty should make sure that students do not use the elevator unless they are disabled or injured and have special permission to do so.

Specific Duties
- The Employee will perform other duties as may be required in order to fulfill the duties of the position or as directed by their supervisor.
- It is recommended that the Employee write articles pertaining to the class/subject matter he or she is teaching. Quest will pay the Employee $100 per article published in local newspapers, or journals, and two hundred and $250 per article published in national or international newspapers or journals upon evidence of such publications.

Non-assignment of Duties
Faculty may not unilaterally assign the duties and/or responsibilities of his/her position to another at any time. Authorization from their supervisor is required.

Garnishments, Attachments and
Quest is not in the business of assisting creditors with the collection of employees' personal debts. However, under certain legal procedures known as garnishments, levies, judgments, etc., the school is compelled by law to take action.

If the employee's wages are legally attached by a creditor, Quest is required by law to withhold a specified amount from the employee's earnings each payday until the debt is settled. If the employee has any creditor problems or anticipates legal action resulting from indebtedness, it is a good idea to immediately discuss it with their supervisor. Involvement by Quest in the collection of more than one of the employee's personal financial debts during a 12 month period, excluding child support, could lead to disciplinary action, up to and including discharge.

Pay Advances and Loans
Due to government regulations and the method of reporting social security, state, and federal taxes, Quest cannot give pay advances or loans to employees.

Benefits

Health Benefits
Eligibility for Health Benefits: All employees who are hired to work 40 hours or more per week, for a minimum of 190 days or its equivalent, will be eligible for insurance benefits. Details regarding insurance coverage are available in the materials distributed regarding each plan.

Health Benefits/Cash Benefits: Quest will pay 70% of the premium for first year employee, 80% of the premium for second and third year employee and 90% of the premium for the fourth year and up employee health benefits.

For new faculty and non-faculty employees, the health benefits will begin 30 days from the contract start date and will be effective the first of the month thereafter (per insurance provider), unless otherwise changed by the Quest Board. If an employee does not renew his/her contract for the coming year, his/her health benefits will be terminated as of July 31st, in that year.

Dental Benefits: The Employee may choose enrollment and participation in the Quest standard employee dental benefits insurance plan, of which Quest will pay 90% of the Employee contribution to the Plan.

Continuing Health Care Coverage (COBRA): Under federal law, employees and their dependents have the option of continuing health insurance coverage at their own expense upon the occurrence of certain qualifying events. Those events include: the death of the employee; termination of the employee (including voluntary termination and leaves of absence, but not including discharge for gross misconduct); divorce or legal separation of the covered employee from his or her spouse; the employee becoming entitled to Medicare coverage, or cessation of dependent child coverage under the terms of the insurance policy. In the case of divorce or legal separation or cessation of dependent child coverage, the employee must notify the Director of Human Capital or designated person in order for the employee's spouse or dependents to exercise their option of continued coverage. For more information on COBRA contact the Human Capital Director or designated person.

Retirement Benefits

403 B Plan: A 403(b) plan is a retirement savings plan that is funded by employee contributions. If the Employee is interested in setting up a 403(b) plan, the employee should contact the Human Capital Director or his/her designee.

Other Compensations and Reimbursements

Department Head Compensation: If the Employee is given a Department Head position, he/she will be compensated an additional $750 per year, which will be reflected in two installments: $375 for the first semester and $375 for the second semester.

Grade Chair Compensation: If the Employee is given a Grade Chair position, he/she will be compensated an additional $750 per year, which will be reflected in two installments: $375 for the first semester and $375 for the second semester.

If the Employee becomes a part of a grant or fund raising team and contributes to receiving a grant and/or collecting fund raising, he/she will be given a bonus, not less than $1,000, to be determined by the Executive Director.

Tuition Reimbursement: Quest shall compensate the Employee to $1,500 for the cost of tuition at an accredited university when the following conditions are met:

1. The Employee must obtain pre-approval from the Executive Director or his/her designee of the course credits to be compensated.

2. The Employee completes course credits for the purpose of maintaining proper licensure required for this employment position or to advance in the education profession or to maintain or advance in the specific position held.
3. The Employee must provide proof of course credit completion and the cost of the tuition paid prior to compensation of the tuition costs.
4. The Employee has entered into an employment contract for the year immediately following the year in which tuition compensation is requested and approved.

Opportunity for Salary Increase for the Second Half of the Year (Needs to be approved by the Quest School Board): The Employee may get up to 10% increase on his/her salary for the second half of the school year if he/she performs all of the following criteria:

- Visiting the parents of their advisory in the first semester.
- Contributing to one or more of the large events of the school. (All staff)
- Participate in 50% of the after school activities. (All staff)
- Attend pertinent meetings with a rate of 90% and above. (All staff)
- Contribute to the PR/Marketing goals of Quest. This includes mass mailings. (All staff)
- Participate in fund raising, donations, and/or grant events. (All staff)
- Doing extra things other than regular expected duties. Examples: organizing community activities, introducing and initiating new programs, etc. (All staff)
- Attending three or more professional development seminars. (Faculty)
- Positive class evaluations by the School Director, student evaluations, and parent evaluations. (Faculty)
- Positive evaluations regarding job performance by the School Director or immediate supervisor. (Non-Faculty)

Salary Bonus: If the Quest Board determines there are sufficient funds over and above stated salaries, an appropriate salary bonus as determined by the Board, may be paid during the month of December to all salaried employees of Quest.

Reimbursement for Travel Expenses: Quest will reimburse an employee (according to the IRS Standard Mileage Rate) for the gasoline expenses incurred while traveling to and from a school-sponsored or school related event. Quest will also reimburse an employee for the vehicle rental expenses incurred for a school-sponsored or school related event.

Staff members must receive approval from the Executive Director or a designee for renting a vehicle two weeks in advance of the school-sponsored or school related event.

To receive reimbursement for gas and travel related expenses, employees must complete a Teacher Reimbursement Form (available from the CoS) and submit it to the Administrative Assistant with a completed Check Request, and the corresponding receipts, for processing.

Employee Leave

The following pertains to teaching positions and employees who directly support students.
Whenever teachers or other school employees are going to be absent, they must notify the School Director or his/her designee as soon as possible so appropriate substitute arrangements can be made.

Sick Leave: Employees scheduled for at least 40 hours per week, for a minimum of 191 days, are allowed 4 (four) days of sick and personal leave per semester. In emergency situations, the employee may be granted additional time. The School Director may require the teacher to furnish such evidence for the necessity of being absent from school. Quest will discipline individuals who violate the intent of this policy. When an employee returns from being sick, he/she must fill out a Leave of Absence form (available in the main office) and return it to the School Director within two business days. If the form is not filled out within two business days, the employee will not get paid for the days missed.

If the sick leave is not used in the first semester, it cannot be transferred to the second semester. For any unused sick days, the institution will reimburse the employee $125 per day at the end of the each semester. Sick leave may not be accrued beyond the semester term.

Non-emergency surgery, dental and doctor appointments should be scheduled at a time to avoid the missing of regular scheduled work. The School Director or his/her designee must approve exceptions.

Faculty must call the School Director by 6:30 AM if they are not able to come to work that day. If the School Director is not available, employees should call the person designated by the Director. The final option is to leave a message at school. Non-Faculty should call their immediate supervisor (who they directly report to). Employees should not call other employees.

Responsibilities to Substitute Teachers
Employees need to have sub folders prepared and available right away for the substitute teacher. Each sub folder should include a Sub Folder Information Sheet provided in the staff lounge addition to materials for class, seating charts, etc. Substitute teachers are not responsible for making photocopies; teachers should have these ready in the sub folder or an appropriate place. This sub folder should be updated at all times. Lessons in the sub folder should correlate with what is happening in the classroom at the time of the teacher's absence. If the subfolder is not provided or not prepared properly, the School Director or his/her designee has the right to take the necessary disciplinary actions. The disciplinary actions could include a written warning, a $250 deduction from the paycheck for each day, or a termination of the contract. In any situation, sub plans should always be emailed to the appropriate department head in order to have prepared materials ready for the school day. In this situation, after contacting the School Director, the Employee also needs to contact the appropriate department head in order to notify him/her of the situation.

This section applies to all employees
Personal Leave: The Employee shall be entitled to one (1) paid personal leave day each semester. Personal leave may not be accrued beyond this semester term. Personal leave days may not be used

directly before and/or after holiday or academic breaks, unless specifically authorized and pre-approved by the Director.

Staff needs to inform the administration one week prior to the use of a personal day. A Leave of Absence Form (available in the main office) must be filled out and turned into their supervisor one week prior to the personal leave day. If the personal leave is not used in the first semester, it cannot be transferred to the second semester. The Employee cannot use more than two personal days per semester. If the Employee needs more than two personal days, he/she needs to notify the School Director at least one week in advance. After the supervisor's approval, the extra personal day will be deducted from the following paycheck. For any unused personal days, there will be $125 reimbursement per day at the end of the appropriate semester.

Medical Leave of Absence: If an employee is physically or mentally unable to perform his or her job, then the employee may request a medical Leave of Absence (LOA). Employees who have disability insurance will receive pay in accordance with the plan during the medical leave. An employee requesting medical leave must complete and return a Leave of Absence form (available in main office) to the School Director at least two weeks prior to the start of the requested leave unless otherwise impossible. Leaves of absence for any purpose that exceed 12 work weeks in any 12 month period will result in evaluation of employment (unless an extension was approved by the Executive Director in writing), to determine the employee's ability to continue working in their current position at Quest. The 12-month period is cumulative within the calendar year, and is counted from the first date the leave begins, and each day that is used for that specific LOA reason).

Maternity Leave: A full time employee who becomes a new parent as a mother is entitled to six (6) weeks of paid maternal leave. This policy doesn't apply to any employee who is not full time.

Paternity Leave: A full time faculty member who becomes a new parent as a father is entitled to three (3) days of paid paternal leave. This policy doesn't apply to any employee who is not full time. Absence beyond three days will be covered by any remaining sick/personal time if possible.

Funeral Leave: For the death and burial of an immediate relative (husband, wife, child, mother, father, grandfather, grandmother, brother, sister) of the teacher or the teacher's husband or wife, three (2) days of funeral leave shall be allowed. Absence beyond three days shall be covered by any remaining sick and personal time or at full loss of pay if no sick and personal time is available to use. Quest reserves the right for the Executive Director or each School Director to grant special permission to an employee experiencing a unique situation.

Travel: The School Director shall authorize all trips involving Quest school employees or official school groups. Any employee or group expecting reimbursement of travel expense must have approval from their supervisor prior to incurring said expenses, at least 14 days prior to traveling.

Jury Duty: Any school employee who is officially called to serve on a jury will be compensated for the difference between his/her regular salary and the stipend paid for jury duty.

Professional Leave: Whenever a school employee is excused by authorized officials to attend any educational meetings, no deduction shall be made in the employee's salary for absence from school for attending such meeting and the employee shall not be required to pay the salary of the substitute.

Non-emergency surgery, dental and doctor appointments should be scheduled at a time to avoid the missing of regular scheduled work. Exceptions must be approved by School Director.

Workshop Attendance: Employees' requests to attend workshops and conferences at Quest expense and during the regular school term should be planned in cooperation with the School Director. Approval will be given to as many teachers as possible, funds permitting, to attend workshops and conferences in areas of their interest. The School Director will endeavor to offer the opportunity to attend conferences and workshops to each teacher in Quest on a rotational basis. The teacher who has most recently attended is to be given least priority in future opportunities.

Attendance at Staff Training and Special Meetings

The Faculty at Quest is required to attend all training sessions, open houses and school functions unless excused by the School Director. The School Director will schedule each employee for training based upon his or her position and experience at Quest. In addition, attendance at special meetings arranged by the School Director is required, unless excused by the School Director. The School Director will provide advance notice of all training and special meetings. A day of training or a special meeting missed may be grounds for disciplinary measures and will be determined by the School Director.

Staff Dress

Quest believes that all staff members set an example in dress and grooming for their students to follow. A professional staff member who understands this precept and adheres to it enlarges the importance of his/her task, presents an image of dignity, and encourages respect for authority. These factors act in a positive manner toward the maintenance of discipline.

The Executive Director retains the authority to specify the following dress and grooming guidelines for staff that will prevent such matters from having an adverse impact on the educational process. When performing duties, all staff members shall:

1. Be physically clean, neat, and well groomed;
2. Dress in a manner consistent with their professional responsibilities;
3. Dress in a manner that communicates to students a pride in personal appearance;
4. Dress in a manner that does not cause damage to Quest property;
5. Be groomed in such a way that their hairstyle or dress does not disrupt the educational process nor cause a health or safety hazard.
6. Staff members are not allowed to wear the following items during school hours unless permission is given by the Executive Director: jeans, facial piercings, shorts, skirts shorter than four inches above the knee, slits in skirts should not go higher than four inches above the knee, low cut blouses (no cleavage), open midriffs, t-shirts, flip flops, sleeveless shirts, tennis shoes or casual sandals.

Student Care

Child Abuse and Neglect Policy

Educators play an important role in child protection: School teachers and school authorities are among those professionals mandated by Wisconsin law to report any suspicion of child abuse and/or neglect. Their personal commitment to the well-being of children adds weight to their role in child protection.

School teachers and school authorities are required to "immediately report or cause reports to be made" when abuse and/or neglect is suspected. Although this is the individual educator's responsibility, the words "or cause reports to be made" allow one specific individual in the school to be delegated this responsibility. When practical, this will be the School Counselor.

The following guidelines should be followed for Child Abuse and Neglect Reporting

Two basic forms of child maltreatment are recognized: The abuse of a child and the neglect of a child. "Abuse" is an act of commission, and is generally characterized in three categories:

> **Physical Abuse** - Non-accidental injury of a child.
> **Sexual Abuse** - Any act of a sexual nature upon or with a child. The act may be for the sexual gratification of the perpetrator or a third party.
> **Emotional Abu**se - Chronic acts which interfere with the psychological and/or social development of a child.
> **Physical categories**- "Neglect" is a failure to act on behalf of a child. It is an act of omission and is characterized in two categories:
> **Physical Neglect** - Failure to meet the requirements basic to a child's physical development, such as supervision, housing, clothing, medical attention, nutrition, and support.
> **Emotional Neglect** - Failure to provide the support and/or affection necessary to the child's psychological and social development.

Any school employee who has reason to believe that a child is being, or has been, abused and/or neglected shall immediately make an oral report of that suspicion to the School Director and to the Department of Children and Families.

The oral report should include:

1. Name and address of the child.
2. Name of person(s) with whom the child resides.
3. Name and address (es) of parent(s), if different from above.
4. Names and ages of other children in the home.
5. The reason for suspecting abuse and/or neglect, including the nature and extent of the child's condition, injuries, and other previous injuries of which he or she is aware.
6. Any information, which may be considered relevant, including the names of other professionals who may be able to contribute additional information.
7. If the situation is believed to be an emergency requiring immediate intervention.

Although it is preferred that the employee provide as much of this information as possible, it is recognized that the person may not always have access to all of this knowledge. The person should not hesitate to report for this reason. Any uncertainty regarding whether to report should be resolved in favor of the child's protection.

Immediately after making the report, the person should notify the School Director that a report has been made. The letter will verify that proper procedures have been followed, and if not, immediately make a report of the incident to the Wisconsin Department of Children and Families at (414) 220-SAFE.

The report shall be prepared by the School Director or the person designated by School Director and includes all information given at the time of the oral report.

Since it is the responsibility of the Wisconsin Department of Children and Families to investigate suspected abuse and/or neglect, the faculty or staff shall not pressure the child to divulge information regarding specific circumstances or the identity of the perpetrator.

The Wisconsin Department of Children and Families shall submit a written response to the school verifying the receipt of each report made by the school.

Student Records

Quest will collect, retain and use information about individual students related to their educational pursuits. The Board recognizes the rights of privacy of the students' and therefore, will maintain careful custodianship and will limit access to student records.

Student records shall be available only to students, their parents or legal guardians and designated school officials and personnel who have a legitimate educational interest in the information or as otherwise permitted by law. Both parents shall have equal access to student records unless stipulated otherwise by court order or law.

The Board authorizes School Directors or administrative appointee to: forward education records on request to a school in which a student of Quest seeks or intends to enroll; provide information related to student identity to appropriate parties in connection with an emergency if such information is necessary to protect the health and safety of the student or other individuals; and request each person or party requesting access to a student's record to abide by Federal and State regulations concerning the disclosure of information

Quest will comply with legitimate requests for access to a student's records within a reasonable time frame. A record may be reproduced unless the record is copyrighted, or otherwise restricted, and the requester may be charged a fee for handling and reproduction. The School Director or his/her designee shall maintain a log of those people to whom information about a student has been disclosed.

Student Supervision and Welfare

School employees are frequently confronted with situations that, if handled incorrectly, could result in liability to the school and personal liability to the employee. The following guidelines should be followed by employees of Quest:

1. Employees shall supervise, control and protect students in a manner commensurate with their assigned duties and responsibilities.
2. Employees shall not volunteer to assume responsibilities for duties they cannot reasonably perform.
3. Teachers shall provide proper safety instructions to students.
4. Employees shall not send students on any personal errands.
5. Employees shall not associate with students, particularly those of the opposite gender, at any time in a manner which gives the appearance of impropriety, including, but not limited to, the creation or participation in any situation or activity which could be considered abusive or sexually suggestive or involve illegal substances for minors such as tobacco, alcohol, or drugs. Any sexual conduct with a student by an employee of Quest or any person of authority in the school is strictly prohibited and subjects the offender to criminal liability and discipline up to and including termination of employment. This provision does not preclude an employee of Quest from meeting with students in private for legitimate or proper reasons.
6. If a student comes to a staff member to seek advice or to ask questions regarding a personal problem related to sexual behavior, substance abuse, mental or physical health, and/or family relationships, the staff member may help the student make contact with certified or licensed individuals in the community who specialize in the assessment, diagnosis, and treatment of the student's problem. Under no circumstances should a staff member attempt, unless properly licensed and authorized to do so, to counsel, assess, diagnose, or treat the student's problem or behavior.
7. An employee of Quest shall not transport students in a private vehicle without the approval of the School Director or his/her designee and the parent/guardian.
8. A student shall not be required to perform work or services that may be detrimental to his or her health.

Any employee of Quest shall report to the cognizant School Director immediately, any sign of suspected child abuse or neglect.

Most information concerning a child in school, other than directory information, is confidential under Federal and State laws. Any staff member who shares confidential information with another person not authorized to receive the information may be subject to discipline or civil liability. This includes, but is not limited to, information concerning assessment, grades, behavior, family background and alleged child abuse.

Transportation by Private Vehicle

The Board authorizes the transportation of students by private vehicle when such transportation is approved in advance by the School Director or his/her designee and the parent/guardian. The request

for transporting students in a private vehicle must be in writing to the School Director or his/her designee and should also be approved in writing by the parent/guardian.

- The parent(s) of the student(s) will be given, upon request, the name of the driver and the description of the vehicle.
- Any person who does not hold adequate automobile liability and personal injury insurance shall not be permitted to transport students.
- Any private vehicle used for the transportation of students must be owned by the approved driver or the spouse of the approved driver and must conform to the registration requirements of the State.

Personnel Records

The Quest personnel office maintains an official permanent record file for each employee.

Upon a written request, the employee will be allowed to inspect his or her own file. Under state law the employee has the right to copy his/her file, except for pre-employment recommendations and records and such other information as may be privileged under law and not subject to employee inspection.

Employees who wish to review their own personnel file shall: request access in writing; review the record in the presence of the administrator designated to maintain said records or designee; make no alterations or additions to the record nor remove any material there from.

Contents. Only that information which pertains to the professional role of the employee and submitted by duly authorized school administrative personnel and the Board may be entered in the official record file. This file should contain the following items and other employment documents and records:

- Application;
- Employment contract;
- Applications for health insurance;
- Resume;
- Reference letters;
- Background Check (school-based employees);
- Certificate and license (faculty);
- Copies of verbal or written warnings;
- Suspensions;
- I-9 Immigration Form (completed after employment);
- W-4 forms;
- Accomplishments;
- Attendance of professional seminars;
- Copy of Disclaimer/Receipt of Personnel Policy and Procedures Handbook;
- *Media release form

Public Records

The Board of Directors recognizes its responsibility to maintain the public records of Quest and to make such records available to residents of Wisconsin for inspection and reproduction.

Public records are records that are kept by the Board, except for medical records, trial preparation records, confidential law enforcement investigatory records, and any records of release of which is prohibited by State and Federal law.

Any resident of the State may inspect and copy by hand the public records of the school during regular business hours of the office in which such records are kept, provided that advance notice of such intended inspection has been given the custodian of the records not less than ten working days before the inspection. The School Director is authorized to grant or refuse access to the records of Quest in accordance with the intent of this policy.

A resident may purchase copies of the school's public records upon payment of a fee. No public record may be removed from the office in which it is maintained except by a Board member or employee of Quest who is authorized to do so.

Parent and Guardian Relations

Quest places great importance on positive and productive relationships with parents and guardians. All staff members are expected to support these relationships through positive and frequent interactions. Opportunities for this to occur include:

- Student goal setting,
- Project Showcases,
- Student led parent teacher conferences,
- Parent asset cataloging and strengthening,
- Connecting parents with services opportunities in the school, &
- Parent governance.

Parents who volunteer their time to the school will be required to undergo the same time of background check that is used when hiring teachers. This is for student safety and there are no exceptions. Results of these background reports will remain confidential and be shared with only the potential parent volunteer.

Resignation, Termination of Employment and Complaints

Resignation

Employees who resign from Quest should give at least a ten day (two weeks) notice. The letter of resignation should state fully the reason(s) for leaving and should be turned in to the employee's supervisor.

The resigning employee should relinquish all property of Quest at the time of departure. Any applicable mandatory and optional, authorized deductions will be made from the employee's last paycheck. Quest reserves the right to withhold the remaining paycheck(s) of the resigning employee until all property of Quest is returned or until all outstanding payments in excess of the amount of the paycheck(s) have been made to Quest.

Quest reserves the right to pay the resigning employee for the notice period and accept the resignation immediately.

Involuntary Termination of Employment: Non-contract employment with Quest is at-will and may be terminated by Quest at any time with or without cause and with or without notice. Employees will be paid for all work performed through the effective date of the termination of their employment. Quest reserves the right to withhold the remaining paycheck(s) of the resigning employee until all property of Quest is returned or until all outstanding payments in excess of the amount of the paycheck(s) have been made to Quest. All applicable mandatory and optional, authorized deductions will be made from the employee's last paycheck.

Quest may provide a letter of reference to former employees. Upon request, Quest will also confirm a former employee's dates of employment and job title. Quest will not provide any additional information, including the reason for ending the employment relationship.

Miscellaneous

Supply Lists
All supply lists will go to the secretary or any person designated by the School Director. These lists can be placed into the 'Supplies' mailbox, monitored by the Administrative Assistants.

These lists will be subject to Administrative approval.

Supplies
We will try our best to keep a stock of everyday needed supplies. Employees should submit their supply request to the Administrative Assistant as soon as possible. This will enable the office staff to fill the order in a timely manner without much delay, unless an item must be ordered. For items other than office supplies, the Employee should fill out a Purchase Order Request (available in main office) and turn in to the Administrative Assistant. Generally the Administrative Assistants are the only employees allowed to enter the supply room. The Administrative Assistants or other office staff are authorized to fill approved orders accordingly.

Mail
The Administrative Assistant will deliver mail to mailboxes when it arrives. There is an outgoing mailbox in the office. If Employees are mailing something personal, they should use their own stamps.

Visitors

All visitors must check in at the office when they arrive at school and they will be given a visitors badge. If Employees see a "stranger" walking around without a visitors badge they should ask the "stranger" about their business in the school. If the employee does not receive a satisfactory reply, they should call the office right away.

Sick Students

If a student complains that they are sick Employees may send him/her to the Dean of Students with a referral letter. Employees should not call the student's parents/guardians. The Dean of Students will handle this. If the student is sent back to class with a pass after the Dean of Students has talked with the student's parent/guardian, Employees must accept the student back into class. If the Dean of Students is absent for a day then the Dean of Academics will be the person in charge of this.

Telephone

Students should not use the telephone in the classroom, no matter what the reason. The pay phone outside the office is for students to use only in event of an emergency. Students are not allowed to use the pay phone during class time.

Staff Mailboxes and E-mails

Employees should check their mailbox and e-mails daily, before school, at lunch, during your break, after school. This is how the office and staff members communicate with each other. There may be memos that pertain to the same day. Do not let students clean/empty your mailbox and use your desk due to the amount of confidential material that is in your mailbox.

Copy Room

Employees should not leave copies in the copy room. If you are not sure how to use the copy machine, please ask the Administrative Assistants to show you.

Employee Acknowledgement

I have received a copy of and have read the foregoing Quest Personnel Policies and Procedures Handbook and am familiar with its terms. I understand that it is not a binding contract, but a source of information and a set of guidelines for implementation of personnel policies. I understand that Quest can unilaterally rescind, modify, or make exceptions to any of these policies, or adopt new policies, at any time. I also understand that the provisions of this Handbook will override any contrary statements, representations or assurances made by any supervisory personnel except the Executive Director.

EMPLOYEE'S SIGNATURE: _____

PRINTED NAME: _____

DATE: _____

Please sign this page and return it to the Administrative Assistant immediately. A copy of this acknowledgement will be retained in the employees personnel file.

Operations Manual
2013/14

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Introduction

Manual Purpose

The purpose of this manual is to provide all members of the Quest team with a set of standard operating procedures and processes. This manual will be revised from time to time according to the change processes described herein. It is your responsibility, as a Quest team member, to familiarize yourself with the contents of this manual and to be aware of any changes.

Where processes exist for the work of Quest, we will attempt to capture those and append them to this document. However, each of you has been hired because of your gifts, talents and abilities and Quest leadership expects you to use sound judgment, regardless of the existence of written procedures.

Wisconsin Statute 118.40 Charter Schools is the guiding document that this operations manual falls under. Whenever a specific issue is not addressed in this document, refer to the state statute. If there are any conflicts between these documents, the state statute is the superior document.

Manual Organization

For the areas of Human Capital, Finance, Parent and Student engagement, and IDEA, additional documents exist. In each of these cases, the latest version of that document is listed below. These documents as well as this document should be posted on the Quest Intranet. The Intranet versions of the document shall have precedence over any hardcopy version of these documents.

Document Name	Version	Release Date	Person Responsible for the Content
Human Resources Handbook	1.0	07/01/2013	Executive Director
Finance Policies and Procedures	1.0	07/01/2013	Executive Director
Parent/Student Handbook	1.0	07/01/2013	Executive Director
IDEA Handbook	1.0	07/01/2013	Executive Director

Table 1. Document Revision Reference.

See Change Management, in Section 12, for details on how to manage changes to Quest documented processes.

What Does the Operations Manual Support?

The Quest Vision

The vision is "To be the most effective network of schools in the United States at closing the achievement gap".

Mission

The mission is "To ensure that all of our students are college ready at graduation".

Quest Beliefs & Values

Quest believes in serving low-income and underserved communities by:

1. Preparing students for life-fulfilling options, including: attending college, joining the workforce, becoming an entrepreneur, or actively participating in the democratic processes of this country,
2. Creating an expectation of doing one's best in each endeavor,
3. Addressing the individualized needs of each student,
4. Providing a quality investment in human capital,
5. Facilitating effective parent engagement, &
6. Creating a school commitment of reinvestment in our community.

Quest Strategies and Objectives

Quest schools will operate in accordance to the Quest Vision, Mission, and Beliefs; while observing the following strategies:

1. Making data-based decisions at all levels. Classroom Examples: interim assessments, authentic assessments, school culture metrics. Administrative Examples: administrative cost per student, parent communications effectiveness, and school to school comparisons. Board Examples include: network operating effectives, network academic performance, and network benchmarking. More specific metrics include:
   a. Matriculating 8th graders will have passed 3 high school courses, prior to 9th grade.
   b. That 12th grade graduates will have passed 4 AP or college level courses, prior to their freshman year of college.

2. Maintaining a culture that embraces and strives for continuous improvement. Examples include: A team based structure that understands the nature of processes and seeks to improve them.
   a. The Center of Support costs are reduced by at least 1% every year.
   b. That Quest students, schools, staff, and the Center of Support will always seek to create and exceed their organizational and personal bests in performance.

3. Creating an environment that supports the relentless and collaborative pursuit of results
   a. That Quest graduates will achieve an average of 21.5 on their ACT tests.
   b. That Quest schools will exceed the state average on the mandated achievement test.
   c. Students will possess 21st Century Skills.

4. Finding and supporting passionate, talented and resilient teachers, leaders and board members
   a. Achieving a staff retention rate of 90% after the first 5 years of operations.
   b. Compensating staff at a rate above the area district average.

5. Establishing relevant and rigorous high standards (operational and academic)
   a. Quest 12th grade graduates will have a remediation rate that is 10% or less than that of their peers, with the ultimate goal of 0% remediation for our graduates.
   b. All Quest 12th grade graduates will have served at least 100 hours of community service or interning by their graduation.

These objectives are the standards for evaluating the actions of all stakeholders: Quest staff members, students, parents, adult volunteers and anyone whom we enlist for the purposes of fulfilling the Quest Vision.
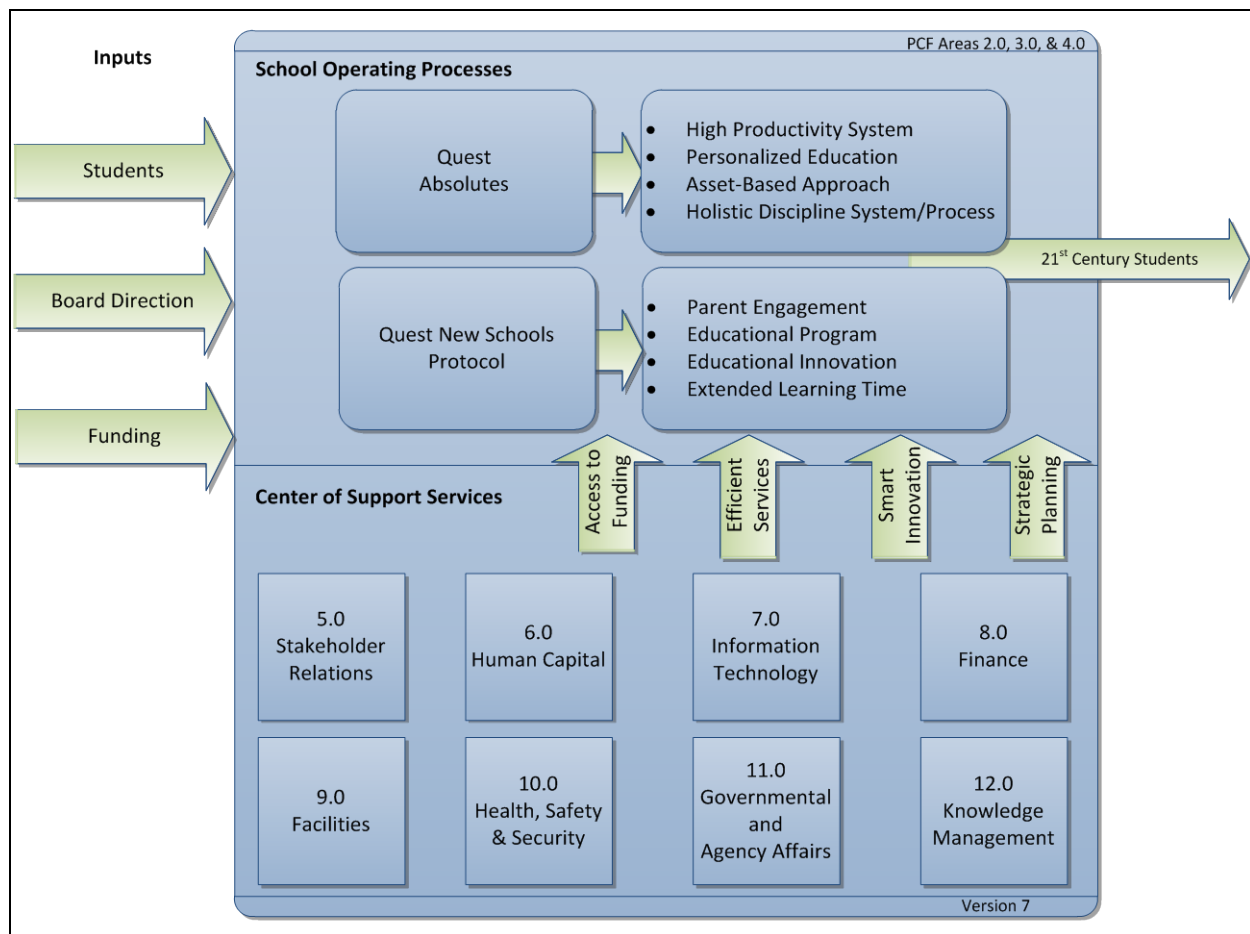
Figure 1. The Quest Model.

The Quest Network will be comprised of 3 schools and the Center of Support (CoS). The organizational umbrella will be Quest-Milwaukee. The home office will be referred to as the Center of Support. In Figure 1 processes pertaining primarily to schools are organized under School Operating Processes. Processes that are common between schools are organized under the Center of Support. These two systems are detailed later as part of this Operations Manual. Each of the model inputs and outputs and the benefits for our schools are briefly discussed below.

The Quest Operating System

This section describes the operating system that Quest will implement to fulfill the Quest Mission. The operating system has two major areas under which activities are organized:

1. School Operating processes - which are to be implemented at the school level and monitored by management.
2. Management and Support Services - which are implemented by the Quest Center of Support (CoS). The CoS is what some charter management organizations refer to as the home office.

School Operating Processes

The Quest School Operating Processes are the education processes at the core of each school's operations. By definition, processes are the purposeful steps that need to occur in order for an output, outcome or a result to happen. There are two types of Operating Processes:

Quest Absolutes are those concrete processes and systems that Quest-founded schools must use with a high degree of fidelity. The use of these processes is non-negotiable and their implementation will be consistent throughout the network. The presence of these absolutes is needed to differentiate Quest schools as part of a high performing system. The absolutes are: *High Productivity System, Personalized Education, Asset-Based Approach, and Holistic School Discipline*.

The **Quest New School Protocol** includes elements that are less prescriptive in how they are implemented by each school. However, their inclusion is a given. Exactly how these processes are implemented will require the input and shaping of each School Director selected for a Quest school. The process of supporting and guiding the School Director will be informed by each School Director's conception and coherence to the Quest Vision, Mission, Beliefs, and Values.

The implementation of the protocol is in response to the query of 'how' to bring the Beliefs and Values into more concrete existence. The Protocol elements include: *Parent Engagement, the Education Program, Educational Innovation, & Extended Learning.* In the text that follows, there is a discussion of each of these elements and some of the major process areas that comprise each functional area.

2.0   Development and Delivery of Curriculum and Instruction

The design goals for instructional program effectiveness are discussed in this section of the Operations Manual. School design is the responsibility of the Quest School Design Team, comprised of the incoming School Director, the Executive Director and his/her direct reports. This team is responsible for developing and executing school design plans.

Curriculum Development Goals

The curriculum must be capable of moving students at a pace of more than 1 year of academic progress in each school year. The curriculum must also have capability of discerning individual student needs and quickly responding to the needs of students who come to the school several years below level.

The curriculum must also include the non-academic skills that have been shown to impact student success in school and beyond. Some of these skills are part of the framework from the 21st Century Skills Partnership. Others are associated skills that Quest has identified as supporting success behaviors of students who go on to and persist in the college setting.

The instructional platform has been selected to provide the needed curricular resources that will allow students to be assigned to the appropriate levels of instruction to meet their needs. Students are assessed during the Student Boot Camp and then assigned the dose of instruction needed to bring them up to level in reading and math within a collaboratively determined time frame. This initial collaboration is between the student, the parent, and the advisory representative. This collaboratively determined

time frame becomes part of the initial Individual Learning Plan (ILP) and is modified periodically, with input from subject matter teachers.

High Productivity System

The Quest network of schools are designed to utilize a high productivity approach to learning which is intended maximize the use of finite funding and teaching resources. Blended learning is the lever that Quest schools use to maximize the utilization of resources. Productivity improvements should always attempt to provide more learning resources to students or use existing resources more effectively.

The Flex Blended Learning model means that the on-line instructional platform delivers most of the curricula. Teachers provide on-site support on a flexible and adaptive as-needed basis through in-person tutoring sessions and small group sessions".   This model is a paradigm shift away from the how most schools operate.
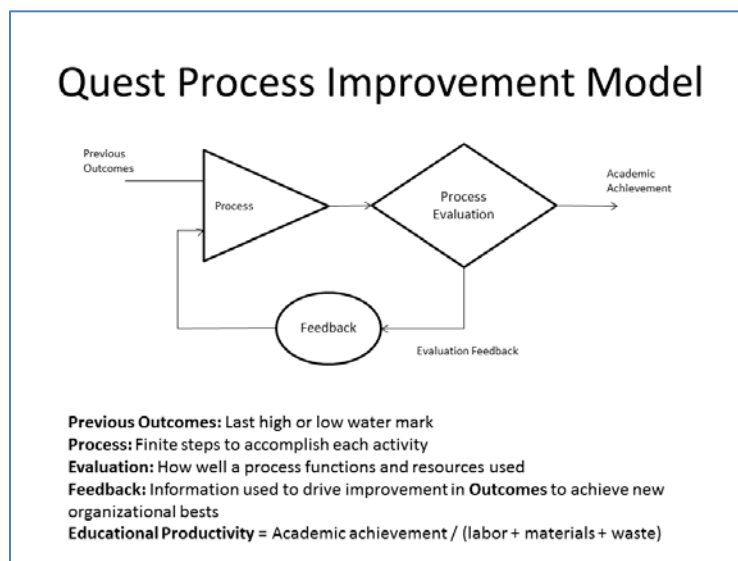
Figure 2. Quest Process Improvement.

Part of this paradigm change involves how student labor is harnessed. In the typical classroom, students far outnumber teachers. However, the teacher's labor is fully utilized, while students have untapped potential to work. This source of labor remains largely underutilized. Student's labor costs much less than teacher's labor.

In referring to Figure 2, whenever student labor can be substituted for teacher labor, Quest can increase student achievement. We must work to ensure that student labor is fully utilized, which has the added benefit of more fully engaging each student.

Harnessing student labor will involve giving students more responsibility for self-direction. Research has shown that all students welcome the opportunity to work at educational tasks that they see as relevant to real world needs. We will place students at the core of their learning, both as planners and as participants.

Quest staff members must ensure that all students are part of the planning and execution of the educational model. That means involving students in every aspect of their planning and involving them in intended changes to the school operations.

Personalized Education

There is no one curriculum that is right for every student. Each student will initiate their own ILP. All teaching staff and advisors will have access to their on-line ILP. The ILP will incorporate their future goals, an assessment of the most recent performance and any plans needed to get back on track or to move forward with their plans.

Full personalization cannot take place at scale, without technology. Technology is an enabler for the level of differentiation needed in our schools. Quest schools will harness the power of technology through:

- On-line learning,
- On-line assessments,
- Additional on-line instructional resources,
- Dedicated social media, and
- Academic data delivered to the student desktop.

These enablers will help ensure that each student receives all the support needed for them to realize their educational aspirations.

Asset Building Approach

Quest will incorporate an asset building approach for each student. Students will be assisted in recognizing their assets and then building on them. This will be enabled by the quality and the amount of data collected on each student during Student Boot Camp. Information that comprises the student portfolio will allow Quest to meet each student where they are and to have a holistic view of each student.

Quest will incorporate products from the Search Institute and the Strengths Movement in assessing and developing student and staff strengths and assets. This approach requires each staff member to view students as an asset to the school versus a deficit that needs to be 'treated'.

This approach will include a reflective planning process for each student. The level of rigor in this process will be grade appropriate, and documented electronically in Project Foundry. Students will use information from Project Foundry as part of gaining an understanding of their strengths and building on those strengths, through multiple iterations of reflection and work. A parable illustrating student life at Quest is included later in this Operations Manual.

Tools and Resources:

The Affinities Program	*http://www.strengthsmovement.com/ht/d/sp/i/188/pid/188*
The Strengths Finder	http://www.gallup.com/press/Gallup-Press.aspx
The Search Institute	http://www.search-institute.org/

It is our intent to provide the outcomes from strengths assessments to all the adults, who themselves should be assets to each student.

School Discipline

Great effort and attention must be given to creating a school culture where progressive discipline is not the norm. Part of creating this culture is to recognize that students, who direct their own learning, have very different relationships with their peers. However, we have created a discipline policy that will be uniform across the network.

This policy will be presented to students during their Student Boot Camp and will stipulate the boundaries that must be respected to ensure a safe learning environment. The current copy of the policy must be posted on the school's website and made available to families at any recruitment or enrollment activities. Please refer to the Quest Parent/Student Handbook for a complete and current understanding of the discipline procedures.

Standards Based Curriculum

All instructional delivery should be aligned to the State Common Core Standards. The CCSS should provide an overarching guide for instructional content, regardless of the delivery method used. If the standards are deemed to be insufficient in a given area, other standards may become the reference standard, for that specific standard. This can only be done with the concurrence of the School Director.

While the standards articulate what will be taught and the impact how we measure academic performance, teachers have the responsibility and a high degree of flexibility in determining how to ensure that instruction fulfills the requirements of each standard. That is, in each case teachers should determine what the best mode of instruction is for that particular standard, keeping in mind that on-line instructional platform can provide most of the instruction needed.

The content of each workshop or other intervention must be aligned to standards. Additional interventions can consist of individual help or any assignable resource available to the student. Assignments should be made through Edmodo and documented in the Student Information System (SIS). Teachers, students and parents will have access to these curricular resources, via the Quest intra/internet. These resources will be organized by Common Core Standards.

We should strive to provide as much transparency as possible regarding what constitutes each standard and which curricular resources support each standard. Whichever resources are assigned, instructional or assessment, the assigning teacher should review the efficacy of those resources as part of the on-going effort of continuous improvement. The instructional staff should encourage students to use those resources to meet their needs at the moment that they have the need.

School Culture

We will design specific programming to use during Student Boot Camps, based on The 7 Habits for Highly Effective Teens, for the middle school students and The 7 Habits of Highly Effective People, for

high school students. Professional development for staff will be presented to assist in helping to get everyone familiarized with the key concepts presented by the authors.

The staff PD and sessions during Boot Camp will assist students and staff in developing a common language and to give all members of the school community a set of standards to assess their own behavior against.

To leverage staff resources in this area, Edmodo will be used. Edmodo is a social media platform specifically for schools. It allows students, teachers and parents to be linked together in on-line communities that are only assessable to school-related parties. These communities can be used as a vehicle to enhance communications in and out of the school. Parents can also be invited into these school communities.

Project Based Learning

Project base learning will assist students in tying together discreet knowledge and using that knowledge to develop higher order thinking skills. Projects should be designed to elicit student work that touches on a number of instructional areas and each project will include details as to how that project will address the CCSS. Each project should also be used as an opportunity for students to demonstrate their mastery of a smaller percentage of the previous years' standards.

Each school will consist of 2 academies. These academies will use project focus areas to reinforce the specialty of the school. These specialties include: Sustainability, Organizational Quality, Social Responsibility, Community Development, Social Justice, Business Management, Non-Profit Management, Water Science or Music Arts.

During the school design, we will incorporate feedback from the surrounding community into the decision regarding what 2 types of academies will be developed for each of our schools. This should be done through a series of community meetings, where the overall desire of the community is considered. The goal at this point would be to pick one specialty, based on Quest perception of the community needs and to allow the communities voice to determine the other specialty area for the school.

A central tenet of our approach to projects is that each project must have a high degree of relevancy to the student and produce an outcome intended to improve the community they live in or the community immediately surrounding the school. We believe that this will provide real world relevancy to our students so that each one sees the importance of what they are learning.

Parent Engagement

Quest will implement Student-Lead Conferencing as the method of engaging parents in their students school life. In these conferences students present their work as part of conference. This type of conference has been proven to help students produce the best work. Student-led conferences have been shown to help improve the quality of student work by involving parents in the presentations. Quest will also make use of student demonstrations or presentations of projects as an opportunity to invite community into the school to see and encourage student performance.

Design and Delivery of Professional Learning

Professional development will be provided to support all school operations and to assist in obtaining the type of school culture that will support the Quest Instructional Aims. Professional development (PD) for all Quest staff members will also be planned according to determined systemic needs. The on-going professional learning needs will also be derived from analysis of student data, teacher performance data, and change initiatives that Quest sees as common amongst its schools and the CoS.

To support the instructional program, project based learning and PD for the learning platform will be presented prior to school opening and as the year progresses. PD will also be presented to support the platform selected to house student work for demonstration purposes (e-portfolio or Project Foundry). Additionally, PD to support the role of the teacher in a Quest school will be presented.

The Role of the Teacher

At Quest, the role of the teacher will differ dramatically from that of the typical teacher in a K-12 school. Quest will need to recruit, hire and support teachers who see themselves as 'connected teachers'. The difference that we see in the teacher's role is contrasted in Table 2.

Additional professional development will be determined upon the analysis of assessment data and assessing overall student needs. Improvement teams, described later in this document, will also provide data that will drive professional learning for staff that work more directly with the CoS.

Traditional Teacher	Quest Connected Teacher
Teacher seen as the Sage on the Stage	Teacher sees themselves as a guide, advisor or coach to students
Teacher feels the need to control student behavior	Teacher sees student behavior as an opportunity
Teacher 'sees' student deficits as something to be added to that will bring students up to level	Student are seen as possessing a set of assets and teachers see their job as guiding students through a discovery process that strengthens those assets
Teachers spend most of their effort (labor) imparting facts to students, working at the lower levels of learning	Teachers spend most of their time assisting students at the tasks of tying information together through activities aimed at higher order thinking skills
Teachers grade most student homework and assign grades	Teachers monitor the e-platform to ensure that all students are showing progress. Most grading and feedback occur on-line
Teachers assign students to remediation after 1st or 2nd quarter of school	Teachers assign students to remediation after no more than a week of below par performance
Teachers assign students to enrichment activities as time allows	Teachers assign students to enrichment activities after no more than a week of near maximum performance
Teachers provide information to all students, regardless of their needs	Teachers personalize information through a social media platform and through personal interactions, according to each students needs

Table 2. The Quest Connected Teacher.

School Culture

Prior to each school opening, additional professional development will be provided to ensure that each teacher is equipped to work as part of a collaborative team that supports student centered learning.

The professional development will include topics touching on: working in a team environment, socio-emotional learning, and self-directed learning strategies.

Quest will also use data from the Student Profile Survey to help determine staff PD. The pre-test of the survey should help to drive some of the initial school PD in the area of culture building. On-going PD that supports student advisories can also be planned from analyzing the results of the Student Profile Survey and collaboratively determining which modules to present first.

After each school has been in operation, a large portion of the professional development will result from analyses by the Discipline and School Culture Team. Through continually assessing culture and monitoring the effectiveness of programming and communications, this team will be positioned to provide recommendations for professional development as well as provide some direct developmental opportunities for staff members.

Effective Instructional Programs

The use of blended learning and project-based learning will require a high level of collaboration between all teachers for the benefit of each student. This shift is facilitated by allowing technology to be the primary conduit for instructional content aligned to lower order thinking skills, i.e. drill and practice and recitation of facts and figures.

The content of each workshop or other intervention must be aligned to standards. Additional interventions can consist of individual help or any assignable resource available to the student, i.e. Kahn Academy videos, Magna High Math Games, videos recorded by Quest staff, Open Source instructional resources. Assignments should be made through Edmodo and documented in the SIS. Teachers, students and parents will have access to these curricular resources, via the Quest intra/internet. These resources will be organized by Common Core Standards.

Additionally, extended learning time and extended learning will both be implemented by Quest. Extended learning time is the additional instructional time that low performing students will need to close the achievement gap. Extended learning is creating the expectation that students will be responsible for instructional objectives previously taught.
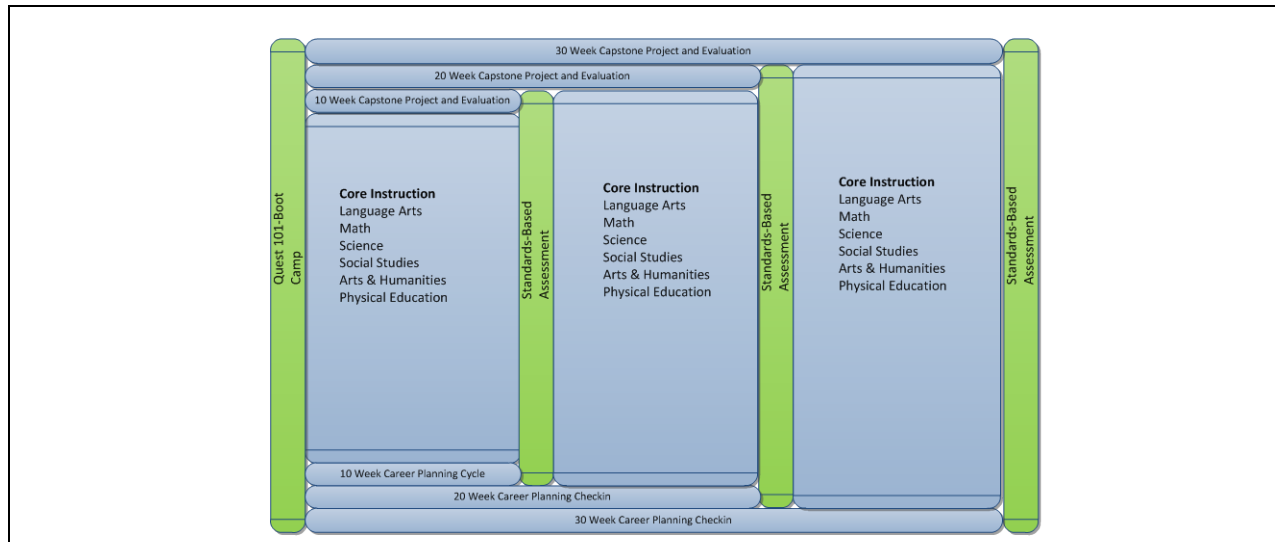
Figure 3. Quest Educational Map.

Quest Educational Map

In Figure 3 we show graphically how we intend to organize our instructional efforts. The primary instruction will be handled by an e-platform with workshops for instructional extensions and remediation. Project Based learning will be used as the method of bringing relevancy to content strands and to integrate learning between strands. Periodic Career Planning meetings will allow consistent coaching to help ensure that students are making progress and staying on track.

These activities are sandwiched between a boot camp and a standards-based assessment. The boot camp will ensure that students understand the culture and that Quest staff knows each student. The standards based assessment block will be the WKCE and whatever assessment is required by our chartering organization.

Quest Instructional Elements

The state of Wisconsin requires that all high school students receive 1137 hours of instruction per year. Quest will achieve this with a mixture of core instruction, presented either 4 days per week or 5 days per week. During the middle of the school year, alternating Fridays will be reserved for students needing extracurricular supports and those students whose projects need additional attention and refinement.

On-Line Instruction – The on-line platform has a direct cross-walk from the CCSS to the instructional activities that correspond to those standards. When teachers notice that students struggle with certain standard, it is their responsibility to refer students to remediation to help those students to master the appropriate standards. In other words, whenever a significant number of students' interaction with the platform results in the unsuccessful mastery of a standard, the subject area teacher for that standard, must develop an intervention for those student that will assist them with mastery of the standard.

The minimum number of students needed to schedule a workshop is 5 and the maximum number of students that should be scheduled into a workshop is 15. Once that standard is mastered, the intervention and the mastery become part of their student profile, via the Student Information System

(SIS). Workshops should be used to remediate students in standards that they did not master and to provide curricular extension to students who need to be challenged academically. Workshops may last more than a standard period by spreading the content over more than one day.

To determine the workshop schedule, student data will be reviewed during the week to determine the following week's schedule for workshops and which students should be scheduled into those workshops. Students will be notified via a scheduled meeting invitation. The e-mailed invitation should include links to any curricular resources that might assist the students who are scheduled for the workshops.

Quest will use brain-based learning, tied to data informed instruction to achieve the promise of achieving greater than 1 grade per year of growth. Quest schools will use research about brain-based learning to ensure that educational activities are enriched with the latest findings in this area. All workshops should follow the Quest standard format to ensure that students presented with the best learning opportunity possible.

Teachers will record, store and catalog workshops, by standard, for use across the Quest network. When specific workshops are scheduled, we will institute a standard practice of recording these workshops for all students to access; as needed. Once recorded, the workshops will then be assessable, via the Quest intranet, when students are seeking instructional resources to assist with their mastery of specific Common Core standards.

Seminars – Students will also have the opportunity to request specific seminars, which might not be part of the Common Core Standards, via Edmodo. These seminars can fill out needed knowledge about a specific project or process or just an area of interest to enough students. This will give 'voice' to students and provide them with further direction of their own learning. Seminars are option experiences, whereas workshops are mandatory and are to be considered part of the curriculum.

Student Boot Camp

The boot camp is an intensive orientation at the start of each school year and will be required of all new students. The camp is designed to:

- Provide students with explicit information about how we intend to operate Quest schools,
- Set cultural & academic expectations, and
- Help students understand how learning will occur.

We will ensure that each student knows that Quest is different than most schools and that they will be challenged to work harder than they may have in the past. We will also let students know we believe that all students have the capacity to learn, when the work is aligned to their interests.

Quest will orient students to current brain research (neuroscience, learning styles, and learning preferences). We believe there is room in this model for students to understand as much as possible about how their own brain works when learning occurs.

We will then help students explore how to manage and maximize their learning while considering their own learning styles and preferences so that students can begin visualizing their own mental learning model when functioning as part of groups and individually.

Students will be oriented to the processes we will use for project-based learning and have the opportunity to produce their first project as a team. The entire project life-cycle will be used as a teaching opportunity for students to understand how projects will become part of their learning at Quest.

As part of the Boot Camp, we will also ensure that students know how to use the technology employed at Quest, including the e-platform, the social media platform and the project documentation platform. This will be an opportunity to reinforce the importance of becoming a self-directed learner.

Assessments will be administered to help Quest build a base-line profile for each incoming student. The information will help Quest determine the type and the intensity of any interventions needed for new students. These interventions can then be designed and scheduled, prior to the first day of school.

Students will be assigned to student advisories, which will be an important part of the Quest culture. As part of advisories, it is important for students to understand how to give and receive feedback with each other. We will use a model for peer discussions and rubrics for assessment. Students will have an opportunity to practice peer assessment and feedback processes in a low-risk environment, prior to the start of school.

Students will be responsible for authoring their own learning plan, based on work by Littky and Washor. Quest will develop a standard format for these student developed plans. The learning plan will include a discussion about their current achievement and their desired achievement trajectory. Under close adult support, students will then produce their first learning plan to be reviewed and completed with their parents or guardians. This activity will prepare them for their first Career Planning Check-in.

Project-Based Learning

Student projects are meant to tie together and to reinforce instructional standards and to produce outcomes that can help to assess the non-academic growth of students. The projects will be used as a way to integrate seemingly isolated silos of facts into usable knowledge. These projects will be developed to encourage students to apply knowledge, which falls under separate standards, to real world problems. These projects should be challenging for students and allow them to demonstrate mastery of higher order thinking skills.

Quest project based learning will use approaches that focus less on the creation of physical projects and more on creating the opportunity for students to solve real world problems. As such, teachers might find supports in the area of problem-based learning, solutions-based learning or Apple's Challenge Based learning.

Projects should be focused on community needs, local, state or global in nature and scope. Projects will be designed by students, with staff guidance and coaching. Students will be taught how to ensure that

their project designs for the year cover the appropriate academic standards for each grade level. Projects should also be used as a vehicle to teach systems thinking. Students should be challenged to only understand systems thinking and to also demonstrate a level of mastery over systems thinking.

Project presentations should be used as an effective vehicle for students to display their mastery of the academic standard as well non-academic performance criteria. We will build on the work of EdVisions and others in using project demonstrations to display learned competencies. In many instances, the structure of the CCSS will assist with this goal. However, if the initial project proposal does not include previously learned standards, the student submitting the proposal must work to include this requirement. The goal should be 15 – 30% of the project standards should be standards, previously learned. This will enable students to gain and maintain a greater sense of relevancy to previously learned material.

One possible project that most students would be asked to participate in is the establishment and then maintenance of a community asset map of the area that surrounds the school. Students could also document the history in the community and construct a composite story about the neighborhood. This activity includes skills, academic and non-academic, that are of value to students as the learn more about their community – interviewing, writing, compiling and reporting.

Our goal would be for students to extend their own asset maps to possibly include elders, business leaders, or community leaders in the school's neighborhood. Another goal would be for members of the community to see the school as an asset to the community.

These projects are meant to tie together and to reinforce instructional standards addressed through the instructional platform. The projects will be used as a way to integrate seemingly isolated silos of facts into usable, applicable knowledge. These projects will be developed to encourage students to apply knowledge, which falls under separate standards, to real world problems. Projects should be challenging for students and allow them to demonstrate mastery of higher order thinking skills.

Projects will include the use of community assets to respond to community needs, local, state or global in nature and scope. Projects will be designed by students, with staff guidance and coaching. Students will be taught how to ensure that their project designs for the year cover the appropriate academic standards for each grade level.

Projects will also be used as a vehicle to teach systems and asset-based thinking. Students should be challenged to only understand systems thinking and to also demonstrate a level of mastery over systems thinking, via the depth of thinking and depth of knowledge demonstrated through their projects. Project presentations will be an effective vehicle for students to display their mastery of the academic and non-academic standards. Many of these standards are part of P21 (The Partnership for 21st Century Skills).

We will also use team projects to help students develop and build collaborative skills that will become an asset to them in their pursuits beyond Quest. Part of the rubric for evaluating projects will be the

innovation students demonstrate, when faced with obstacles to executing their project design, implementation, and even evaluation.

Tools and Resources:

Bonner Curriculum: Community Asset Mapping	*www.bonner.org/resources/modules/.../BonCurCommAssetMap.pdf*
Challenge Based Learning	http://www.challengebasedlearning.org/
PB Works	http://www.leadingpbl.org/w/page/15692082/FrontPage
The Buck Institute for Education	http://www.bie.org/
Think FIninty	http://www.thinkfinity.org/

We will also use team projects to help students develop and build collaborative skills that will become an asset to them in their pursuits beyond Quest. Part of the rubric for evaluating projects will be the innovation students demonstrate, when faced with obstacles to executing their project design, implementation, and even evaluation.

Career Planning Cycles

Toward the end of each planning cycle, students will have the opportunity to review their work and to compare their work products to their learning plan aims and goals. This will help them gain alignment between their student-developed aims and goals and their current progress and trajectory. If adjustments are needed, students will collaborate in development and document those changes and this will become part of their amended learning plan.

Students will use asset mapping techniques to help them identify who their supports are at home, in school, and in their community. If they determine that they don't have the assets in these places to help them execute their learning plan, they will be encouraged and assisted in locating additional assets.

Student advisories will support the Career Planning process. The Career Planning Cycle is meant to assist students in conceptualizing and then executing a mental model of success. Quest will introduce students to a number of change frameworks as they progress and develop that are appropriate for their developmental state. These frameworks will assist students in viewing success as part of their fabric, as opposed to something separate from them.

Reviewing and executing their learning plan will encourage students to view systems thinking on a more personal level. They will be able to see relevancy in how mental models help them to solve personal problems and challenges. A recognized tool, like WorkKeys should be used to assist in the career development process.

Student Advisories

Multi-aged, single-sex, student advisories will also help develop the school culture. Advisories will be initially established during Boot Camp, accompanied by an experiential learning experience for students and advisory leaders. During the first few years of Quest, the advisories will need to be more dynamic in membership as more students and staff are added. The overall goal is to ensure that at least one adult in each school has a group of students who they know very well. In other words, each student should

have someone who really knows them well and can advocate on their behalf, because they know the 'story behind the student'.

Edmodo communities will be formed to mirror the advisory communities. Each adult in the building who is connected to learning is expected to lead an advisory. The advisory leadership components will be presented during staff PD, prior to the start of the year. At this time it is envisioned that Advisory groups would meet at least once per week. The topics to be covered will include elements of the Affinities Program, through the Strengths Movement, and Search Institute's Developmental Assets curriculum.

School culture will be assessed through a number of measures. Year-end asset surveys will give perspective to the overall year and the progress made in building assets. We will also track daily attendance, student performance and discipline referrals by advisory. The best practices in advisory groups will be shared during the on-going advisory professional development, with the aim being that the best practices are shared between advisors and the overall performance of advisory improves as a component that supports school culture.

Tools and Resources:

Advisory Programs	http://www.amle.org/Research/ResearchSummaries/ AdvisoryPrograms/tabid/812/Default.aspx
Student Advisory	http://www.ashland.k12.or.us/files/StudentAdv.pdf

Quest Attributes

Through the means stated above, we need to build a culture that for our schools that have the attributes detailed in Table 3. These attributes grow out of our view of the best that these two, excellent schools offer and is presented through the lens of rigor, relevance, and relationships.

Quest Attributes in Terms of Rigor, Relevance and Relationships	
Rigor	Subject area performance is maximized and enhanced by integrating projects across subject areas
	Technology is used as the delivery platform for learning and a tool for developing projects
	The learning spaces are relatively defined, but learning can also occur any-time and any-place.
Relevance	Projects support community building while respecting the needs of independent thinking
	Learning is highly self-directed in content and in pacing
	Learning is explicitly relevant and guided by external standards
Relationships	Teachers are coaches
	Relationships are highly valued

Table 3. Quest Educational Attributes.

Assessment of Student Achievement

Data driven instruction is an important aspect of the Quest overall instructional program. It provides feedback about the instructional program; by assessing the efficacy of the instructional platform in helping students meet their learning targets. By using periodic assessments that are tied to standards and ensuring that the workshop curriculum aligns with those assessments, the instructional program for each student is continually assessed and adjusted.

Data should be extracted from the instructional platform on a weekly basis to identify students who need extra supports will be scheduled into targeted sessions to help them master the corresponding failed standards. Students, who have mastered a higher percentage of the attempted standards, will be scheduled into extension workshops or to stretch specific project goals that correspond to standards mastered on the instructional platform.

Capacity issues and priority around remediation and extension workshops will determine the cutoffs for each intervention. It is expected that Quest will likely experience student distributions similar to that of other practitioners of Response to Intervention strategies.

Evaluating the Effectiveness of Programs

Programs will all be assessed against the most important metric, student achievement. The use of data throughout Quest will enable all evaluations to be data driven. Quest will use of live data to assist with the evaluation and improvement of programs and collect additional data where needed.

Program evaluation will also be the responsibility of the Data and Curriculum Team, which is discussed later in this document. By design, on-going evaluation will part of the Quest culture. Teams will review all aspects of Quest operations, including non-academic programs to ensure that they are adding to the mission and not subtracting from operational effectiveness. Phase 1 tasks related to Development and Delivery of Curriculum and Instruction are listed below.

3.0   Delivery of Student Support Services

Student support services such as counseling and other aspects of the socio educational support of students are described below. This area includes special education, Title I services, student counseling, college coaching, sports, student groups and referral processes to community agencies. Quest will consider using methods identified by James Comer in developing its approach to supporting student needs.

Requirements for Support Services

Student support services are required to provide those extra supports for students with socio-educational needs above what can be provide by classroom teachers. Support services are also desirable for students whose needs can be met by teachers, but whose performance in the classroom can be enhanced with additional coaching and nurturing.

Interventions must be designed before they are needed. Therefore, Quest will design interventions for its students that will support student success, prior to students first day of school. These interventions

will be discussed with prospective students and their families during the orientation and enrollment process.

We must ensure that students and their parents know how and when these interventions will be used and what will be required for students to exit from these interventions. Intervention designs and aggregate results will be shared with all stakeholders for purposes of continuous improvement. Interventions, funded by external sources, i.e. Title I, Special Education, must incorporate the funder's guidelines for notifications to participants, parents and other stakeholders.

Evaluation of Support Services
Evaluating services requires that staff members be trained to be effective observers. All services must be evaluated to ensure that they are enhancing the educational experiences of Quest's students. Evaluations will include observation, the use of surveys, existing data, and other instruments to determine how each service aids with and aligns to academic achievement.

Coordination of Community Support Services Related to Student Needs
Where needed student support is beyond what the school can provide or where extraordinary providers exist, those providers will be identified to provide services to the school. These providers may eventually become partners. However, they must share a similar mission to be effective with the school. Partners with quality services and the capacity to deliver will be connected with students needing the services the most. This direct student service model will require on-going evaluation, oversight and support.

All partner organizations that provide services directly to students must provide proof that their workers have passed appropriate screening for education workers, i.e. background checks, TB screening, etc. The purchasing or payment, even reduced cost payments, for services must be approved through the Quest Contracting process, which is outlined in the Financial Policy and Procedures.

Design and Implementation of Parent Engagement Programs
Parent engagement is a vital function for schools. Typically, parent engagement is most active in the elementary schools, when parents are requested to attend plays, musicals, and other events. Parental responses to request for engagement seem to change at the middle and high school levels.

Quest will seek to understand the parental needs regarding how and when they are contacted and seek to find positive avenues to build effective relationships with parents that aid their students in reaching their full potential. All staff will receive training and coaching to support this activity. The focus will be one of building on student strengths and their gifts, talents and abilities – and then enlisting parents in that process.

All staff should use a career focused lens involve parents in our schools. Parents should be encouraged to participate in the student Individual Learning Plan (ILP) process and the Career Planning Cycle. Parents should review and then sign off on the plan. These plans help set the trajectory for the student and to estimate the parental involvement needed to support the ILP. For parents to have a substantial buy-in to the plan, they must understand the requirements of the plan.

Quest will involve students by ensuring that conferences are student led events that allow students to own their performance, present their performance, and to grow in their presentation skills. Current student performance should be contrasted to the ILP and reflected upon by the student, with the parent and the advisor as active coaches. The role of the parent in this activity will be presented in the Parent Orientations, prior to the start of school.

In the 9th, 10th and 11th grades, the Explore, Plan and ACT tests are effective predictors of college and career readiness and can become a reference point for effective discussions about student progress and needs. Quest will use these predictive assessments to enlist the assistance and support of parents in helping to guide their student's future.

Design and Implementation of Counseling Services

Student counseling will revolve around the use of the Advisory. Advisory provides a forum for helping students to acquire problem solving skills and to apply those skills to remove barriers to academic success. Advisory curriculum should be informed by the Student Profile Survey conducted prior to the start of school. The survey should also provide insight into the macro counseling needs of the school's student population.

The school will adopt a set of metrics that will help to gage the effectiveness of our overall student counseling efforts and the impact of advisory on the socio-emotional needs of students. Those metrics will include attendance, behavioral referrals, and detentions. The school's counseling professional will support building the school's culture and provide professional development to the entire staff on how to address the socio-emotional needs of students. He or she will also work with students and their families on transition plans for students leaving Quest for college or even another school.

Additional counseling resources may be contracted for through 3rd party agencies in times of crisis or where and when it might be advantageous to assess and make immediate changes to the student culture at a given school. Any additional counseling contractors must also pass the same type of screenings that educational workers must pass, in order to have contact with Quest students.

Design and Implementation of Social Services

Social services provide links between the school, the family and community resources. Often this linkage is invoked during the most stressful situations, i.e. abuse, abandonment, etc. Quest will seek to provide these services proactively.

A case management process will be developed that protects students, but allows Quest to learn from student referrals and thereby increase its efficacy in the processes related to social service delivery. This approach should help Quest to support students more holistically.

If a school has the resources to provide a school counselor and a social worker, they must develop a plan or approach that integrates their work, in support of students. The plan needs to ensure that the case management processes are similar and coherent enough that staff can understand how to effectively make referrals to these services in a way that supports students.

Design and Alignment of Extra-Curricular Services

Extra-curricular activities are part of a quality school experience. Quest will assist its schools with the design and delivery of quality activities. Possible partners in this area include the Boys and Girls Club™ and Junior Achievement™. Quest will also develop agreements with district middle and high schools that allow Quest students to participate in sports activities.

For the high school level, Quest will provide service opportunities and internships for students. Some service opportunities might be available for high school students to assist middle school students with peer mentoring and study assistance. Phase 1 tasks related to the Design of Student Support Services are listed here.

Each school director must present a plan for extra-curricular activities as part of their overall budgeting and planning process. The CoS will provide help in looking at common needs and in developing any agreements required to implement these activities and services.

4.0   Operations Management

Core administrative processes for the Quest network are discussed in this section. In many schools these processes are coordinated by business managers or secretaries. In the Quest model, these duties will be shared between designated staff members at the school and the CoS. To fully enjoy the anticipated economy of scales, the planning, acquisition, and evaluation of these services will be collaboratively led by the Center of Support.

The CoS will work with school leadership to maintain a central compliance calendar in Google Calendar that will help to ensure that adequate resources are in place for state-mandated reports and other compliance needs that might be overlooked. This central calendar will provide a cycle of management to help drive the support, assistance, and oversight activities of the CoS staff. The processes are detailed below.

Resource Planning and Acquisition

Planning resource needs will require the development of base-line forecasts and developing an understanding of the resources needed. These resources might be community resources as well as instructional resources that will require a level of collaboration to set up and establish.

The network's economy of scale should assist schools in acquiring the material resources that are needed at each school. To ensure that these resources are ready when needed, a high level of logistical collaboration and planning is needed. This includes employee FTE counts, resource sharing between schools, selection or continuance of service providers, ensuring that all service providers have the needed capacity, and renegotiating agreements if additional capacity is needed from providers.

Resource planning must be initiated at the conclusion of each school's strategic planning process. The process for resource planning should answer the 'how' of all the 'whats' that are developed as outcomes form the strategy sessions. These requirements then must be used as considerations for the budgeting process, so that effective budgets can be built.

Once the budget is approved, school leadership must work with the CoS to ensure that adequate resources are in place to effectively execute on-going school operations and any initiatives that might come out of the strategic planning process.

Procurement of Materials and Services

The Quest CoS will function as the purchasing agent for Quest schools. The CoS will maintain vendor relationships and an adequate line of credit to ensure the smooth flow of educational materials and services to our schools. This support will include conducting periodic physical inventory audits.

We have already begun establishing relationships with several vendors and shared our global goals and the timelines we are working under. We have also developed frameworks for assessing the organizational fit between some of these vendors and our overall strategy.

Transportation Services

Quest does not anticipate providing transportation services for students to reach the school and return home. From time to time, field trips and excursions must be planned and executed. When classroom teachers have to be concerned about this level of planning, time is diverted from instruction. The CoS will work with school based staff to ensure that this activity is well planned and well executed, freeing classroom teachers to focus on the most important activity – student achievement.

Food Management

Managing food services is not part of the core competency of most School Directors. It is however school site based and must take into account the particulars of each location. Quest will seek to partner with food provider to ensure that all of its schools have a quality food service program. The CoS will take the lead in ensuring that students have high quality food service providers. Providers like Revolution Foods will be considered as potential partners for our schools.

Logistics and Warehouse Management

The material needs of schools vary during the year, typically reaching the peak pull sometime during the summer months. During peak demand times some warehousing may be needed. The CoS will maintain a vendor relationship with a warehouse or will acquire needed warehouse space to use for these periods of peak demand.

Some common materials may be less expensive to order in large quantities and then have vendors store these materials. Copy paper can be an example of this kind of material. It can frequently be less expensive to purchase a half year's supply of copy paper and have the vendor store and deliver on demand than to purchase every two or three weeks. The CoS will maintain a commodity list that will be reviewed for costs and frequency. This will help ensure that Quest schools are getting the best bang for their buck on these types of purchases.

Library Services

Libraries are changing from the statically located rooms of the past, to the dynamic, highly assessable data storehouses hosted on intranets and the internet. Quest will ensure that all of its schools have

access to best-in-class library services through resources hosted on its computer network and through the Internet. Phase 1 tasks related to the Design and Management of Operations are listed here.

Quest Center of Support Processes

The systems and processes detailed in this section are also frequently referred to as "back office functions". These processes are essential to the effective operation of any school and are even more essential to Quest, as a network of schools.

The overall Quest operations strategy requires effective and efficient operation in this area, allowing teaching leaders at each school to focus on the business of education. In most schools, the operations shown in the Business Model (Figure 1) under CoS processes, are business functions that few School Directors are well equipped to carry out, much less organize them into an effective part of the school enterprise.

5.0 - Managing Stakeholder Relations

All schools have stakeholders. These include: students, teachers, parents, employees, funders, vendor partners, business sponsors, or other interested parties. Developments in these process areas ensure that Quest addresses communications with an overall strategy that includes the following key processes:

Stakeholder Relationship Strategy Development

Quest will immediately retain a consultant (interim Development Manager) to assist with developing a set of strategies that will build and sustain positive relationships with all stakeholders. This strategy will include analysis of who the stakeholders are, what their needs are, the messaging that is needed to support each stakeholder and building an infrastructure that supports all Quest stakeholder communication needs.

Development of the strategies will involve interviews and focus groups with identified stakeholders and identification of the appropriate communication channels to harness as part of the strategy. The strategy will include internal stakeholder (staff) and external stakeholders and consideration of the unique, as well as the common needs that both stakeholder groups have.

Stakeholder Relationship Strategy Management

The Quest educational program will require support from the community. The educational program will use project-based learning and these projects must be externally references for them to have relevancy to students. This will require working with non-profit and for profit businesses to establish intern and service learning opportunities and to help guide the development of students.

Quest will establish relationship goals for each stakeholder segment and use this data to build solid enrollment estimates, in collaboration with the School Directors. Quest will use the processes and approach outlined by Jerry Acuff in the Relationship Edge. Best practices in this area will be shared with each school staff and their stakeholders to ensure that school personnel are equipped with the needed skills. The work in this area will become more focused, once a location is identified for the 1st school.

Execution of this strategy will be the ultimate responsibility of the Executive Director, who has extensive experience in area. The strategy will be executed with the assistance of the above-mentioned consultant. As Quest grows the CoS, this responsibility will be transitioned to a Director of Development. As in all strategies, success with managing relationships requires diligent, relentless execution and on-going evaluation.

Communications and Publications Strategies Development

Communications are a key part of gaining and maintaining organizational alignment between the stated mission and vision and activities that support the mission and vision. Through effective identification of stakeholder needs, an effective communications strategy will be developed and executed. This strategy will included the following media: print, website, social media, e-mail platforms, and other outlets that enable the effective execution of the overall strategy.

Quest will develop strategies, objectives and metrics for each stakeholder segment that will capitalize on their unique characteristics.

Communications and Public Information Strategy Management

From effective strategy development will come an agreed upon plan that includes roles and expectations regarding what needs to be communicated, how often, to whom and how it will be communicated. The effectiveness, both from a dissemination and cost effectiveness viewpoint, will be evaluated and continuously improved.

Through on-going evaluation, the most effective channels of communication will become the focus of investment and those less effective means will be avoided or eliminated. This strategic approach to communications will help Quest schools to efficiently leverage available resources.

Stakeholder Relationships and Transactions

Effective communications are part of effective customer service. Quest will use elements of best in class customer service models to ensure that all stakeholders receive the best treatment during every transaction. These transactions might be as wide-ranging as requests for enrollment applications to the school to donor requests to donate to the school.

All stakeholder requests must be tracked and responded to in a professional and timely manner. Each transaction should leave stakeholders feeling confident that Quest, as an institution, is something they are proud to be a part of. Stakeholder satisfaction will be assessed on a periodic basis as well as randomly to ensure that our processes that support stakeholder relations are consistently well executed.

Budget for Stakeholder Relations

Developing and managing a budget for all the activities listed above is crucial to the effective administration of these activities. Often, communications is an area that suffers reductions in funding when resources become scarce. Quest leadership must work to ensure that Stakeholder Relations is an actively supported function. The Phase 1 tasks related to the Development and Management of Stakeholder services are listed here.

6.0 Human Capital Management

The School Directors, teachers and other adults in Quest schools will ultimately determine the efficacy of the educational program. Recent studies have made clear again that the most important factor in a child's education is their teacher. This same study makes clear that there is greater efficacy from teachers who are in the upper third of their graduating class. It further identifies hiring practices that are successful in recruiting and retaining these top teachers.

As part of the overall Human Capital strategy, Quest will recruit and hire School Directors, well in advance of the opening date for each school. Part of their work will be to complete the details around school design, as outlined earlier in the New Schools Protocol. Other parts of their work will involve supporting specific projects that will assist in their global development and help them understand all the aspects of the CoS services.

Human Capital Planning, Policy and Strategies Development and Management

The Quest human capital strategy is linked to the overall Quest strategy. Quest Value #4 is "Providing a quality investment in human capital". This value is operationalized by ensuring that the best candidates possible are recruited and hired to carry out the work of our schools and the CoS.

Accomplishing our Human Capital goals will require extensive planning and developing manageable policies and procedures for schools and the CoS. These policies are documented in the Personnel Policies and Procedures Manual.

Planning for school staffing should be part of an annual appraisal process. The process should begin just after the start of the calendar year and position each school to identify candidates to offer positions to by March. This allows all parties to anticipate organizational and individual needs.

Recruitment, Sourcing, and Selection of Employees

The talent pipeline must be developed and monitored. Quest must maintain a highly selective hiring process to ensure that the right employees are brought into the organization. This means that we must always ensure that enough candidates are aware of positions at quest to allow us to pick from the very best of these candidates to fill positions.

To aid in this effort, use the services of the Quest selected and hired HR consultant to assist with formalizing our approach to talent acquisition and hiring. This consultant will act as the Quest internal HR function for the 1st 4 years of operations. .

This consultant has also been asked to recommend a web-based sourcing platform to leverage our future efforts. The web-based platform should allow transparent workflow management of the hiring process – allowing school-based employees and CoS staff to stay informed about the status of its open positions and how candidates of interest progress through the hiring process.

Development and Coaching Employees

The operational vision, mission, and values of every organization guide the behaviors of the organization. The stated or espoused values can often be different than the observed values. Education

and training can prepare employees for the roles they will play in an organization. When the realities of the organization are encountered, employees may need some level of coaching to reach the next level of performance. Here is where coaching can help, by reducing the variation between what is needed and what is being provided by each employee.

School leadership cannot allow differences between what should be done and what really is being done to affect the school culture negatively. In the Quest environment, there must be a high level of transparency regarding performance. Since this is an evidence-based school and we will be providing on-going guidance to students, we must model good coach and coachee relationships for our students.

This means, that on-going instructional coaching should be seen as the norm. By making the performance criteria transparent and critical to our success, we can insist on a high level of accountability from our instructional staff. In the most simple of forms we might implement a rubric s similar to the one in Table 4. At the school level, each School Director will be responsible for this activity.

Performance Level	Descriptors
1	This teacher meets the needs of no students or very few students
2	This teacher meets the needs of half of the students. It is common for some parents and students to complain about this teacher.
3	This teacher meets the needs of all or almost all of the students on a consistent basis. This includes the high-achieving students, as well as the struggling students.
4	This teacher not only meets the needs of all or almost all students, but is a mentor to other teachers on the staff. His/her strengths spread beyond the individual classroom.

Table 4. Teacher Evaluation Rubric.

Employee Recognition and Retention

Hiring new employees is expensive. There are hidden costs involved in recruitment, selection and hiring and on-boarding each employee. The costs of hiring a professional employee can exceed 50 to 200% of an employee's annual salary. It is therefore advantageous to ensure that the organization is properly supporting, rewarding and retaining employees.

Rewarding and retaining employees should reinforce the on-boarding and coaching they received upon their hiring. The compensation and career development of each employee enable them to reach the full potential and to serve the organization and ultimately the students who are enrolled by Quest. We will structure an effective on-boarding process that will help to propel each employee into their new role. The on-boarding process will include the immediate manager and all pertinent Center of Support personnel that support each employee.

Pay for performance – At this time, no specific pay for performance system is being proposed. However, as financial self-sufficiency is approached, each position's contribution to Quest's outcomes will be evaluated on a yearly basis. A pay for performance system will be developed after the 1st school is

opened. This will allow Quest to more accurately develop an adequate performance pool to support a pay for performance system.

Employees Redeployments and Retirements

Planning for the long-term health of Quest means that retirement and succession planning needs to begin shortly after the organization becomes operational. All Quest employees should understand the career pathways open to them. Charter schools have typically promoted from within as a primary method of developing their talent pipeline. Quest also sees this as the most viable talent pool for its planned growth.

When employees are promoted to new positions, this creates openings which must be filled. Quest anticipates that many future employees will have the capacity to assume leadership positions in the organization as it expands. Quest will balance hiring for current positions with hiring for growth, by hiring with the future in mind.

Employee Information Management

Managing employee information is a key to managing an organization's talent pool. This information includes current employees' data, including their skills talents and abilities; as well as their aspirations and the areas of their performance needing attention.

The CoS will develop, monitor and improve procedures to support these processes. The current Quest budget includes funding for an HR Consultant. One of the consultant's duties will be to help Quest verify the need for a Human Resource Information (HRI) system. A decentralized HRI system would allow managers to access current employee information regarding, certification status, background checks, and other data pertaining to their employment status.

Under ideal circumstances, this system would receive data from the recruitment system and allow for a labor savings and cost avoidance. Single entries in one system would not have to be duplicated in the other. There are vendors with unified systems that will become part of the research and selection process. The overall functionality of any system selected will be balanced against the initial cost and resources needed to maintain the system. The Phase 1 tasks related to the Human Capital Management are listed here.

7.0 - Information Technology Management

This section supports the technological functions of the Quest administrative team at the CoS, the administrative team at each school, the teachers and most importantly, the students. Provisions must be included for a 3 year technology plan that is revisited each year. Also, disaster and recovery plans must be developed that will allow the administrative functions to survive any number of unplanned or catastrophic events, e.g. floods, tornados, theft or vandalism.

Information Technology Management

The nature of information technology (finite operating principles, specific interface requirements and complex cost considerations) requires that IT assets be closely managed, both from cost and utilization

standpoints. Internal user agreements must be developed and maintained in collaboration with Human Capital leadership.

The complexity and resulting expense of each staff computer are best determined and maintained as organizational standards. Because of the sheer number and expense of each student computer, the exact requirements – no more, no less – need to be articulated and reviewed to ensure that the current and projected needs are met.

Use of Google Chromebooks will allow Quest to avoid many of the ongoing and costly byproducts associated with students using computers. The operating system and software are more or less hardwired and therefore remain largely unaffected by viruses and malware or unintentional changes in the configuration of the computers by the students.

A standardized approach also ensures that procurement specifications are specific which enables the total cost of ownership to be minimized. Any deviation outside of the standard computers configuration (graphic design, video editing, software design, etc.) will require a sign off from the ED or the Director of Information Technology.

Google Chromebooks are budgeted for in each school's budget models and is included in the overall Financial Model. Chromebooks can be centrally configured and changed from a web-based console so that each computer receives the update, the very next time a student logs in.

Development and Management of Internal IT Customer Relationships

An internal IT function, if provided via external consultants or internal employees, must provide a valued service to the organization. The service promise should encourage organizational members to work through the IT function for solutions, versus working around IT to accomplish individual goals. When correctly implemented, there is a balance arrived at between standardization and the constraints therein and optimization of the users' experience.

To assist with the service promise, Quest will implement help desk functionality through a 3rd party provider – Web Helpdesk. Help desk tickets will be issued for all staff initiated requests. IT services are valued most when they are responsive to user needs. Web Helpdesk provides users with updates as to the status of their issue and maintains data regarding IT responsiveness and to each type of issue being resolved.

This functionality will help Quest control costs by providing metrics on meantime between failures, meantime of repairs, repair cost, and other systemic IT issues. These metrics, when properly analyzed and assessed, become drivers for future cost reductions, budgeting, and updating computer standards.

Business Resiliency and Risk Management

Every organization should provide methods of preserving and protecting the data it produces and uses. The popularity of web-based applications is due in part to the goal of resiliency. In other words, what happens to my data if there is a catastrophe (theft, floods, and hurricanes) and my facility is damaged or compromised? So, it is important to find and implement solutions that allow for the continuance of operations, even after catastrophes.

Managing this area of IT involves understanding the cost/benefits of various solutions and maximizing the benefits, while ensuring that the user community has the best user experience for the cost. This requires assessing the risks and developing responses to those risks that have appropriate levels of costs attached to them.

The initial Quest budget provides for one general purpose, hot-swappable, file server. As Quest grows, data storage requirements will become clearer. Upon understanding the dynamics around storage, goals and procedures must be developed and reassessed that can minimize the time and effort required to return to 'business as usual'.

Enterprise Information Management

Human Capital produces intellectual capital – that is the information that is used to guide the organizational as well as the data that is used to ensure that stakeholder needs are met. One of ITs roles is to ensure that staff time and labor are used effectively in maintaining this information stored on individual computers, servers or in an IT cloud environment. IT leadership must work with the other functional areas to ensure that information, vital to the organization, can be stored and retrieved with minimal effort and while using appropriate levels of security.

Information produced by the various functions can become contained in silos, unless sharing is encouraged and facilitated. Quest must monitor the use of network resources and ensure that adequate storage is available across the network. The shared drive at the CoS should provide generally available management information to each school. Management will set guidelines as to how this will be accessed and the level of security that will be required.

Management will set storage requirements for employee computer accounts. These limits will include limits on document files, application files, and e-mail storage. The limits must for each employees role must be taken into account. Employees who directly interact with statutory requirements should have access to the level of storage needed to fulfill that requirement.

IT Solutions – Development and Management

Developing, documenting and sharing various IT solutions will assists with collaboration between stakeholders and effective use of the supplied IT tools. Quest will maintain an IT webpage on an intranet that will allow staff and students to view self-help files and videos that will help minimized the costs of IT services.

To meet the IT design goals (low cost and high reliability), Quest will seek to use a number of cloud-based IT solutions. These solutions will be maintained by 3rd party providers, but allow Quest to provide a level of customization that will leverage its Human Capital. Google for Schools is the cloud platform of choice for sharing.

Education Elements (EE) may be used as a systems integrator to allow Quest students and teachers to access a single logon account. The functionality of the EE product will produce productivity improvements for students and teachers. It will also provide a managed data warehouse to Quest and allow Quest IT management to avoid building out this functionality.

Cloud-Based Application	Selected Provider	Purpose
Document sharing	Google for Schools	Access to common documents
Calendaring	Google for Schools	Access to common calendars, by group.
Instructional Platform	Education Elements	Provide the primary instructional platform
Social Media	Edmodo and Project Foundry	Provide linkage between teachers, students and parents
Learning Management System	Moodle or Brain Honey	To store and track instructional resources

Table 5. Cloud-Based Applications.

Google Apps is currently free, but allows the use of the best in class IT tools, i.e. Microsoft Outlook, iPhones, BlackBerrys, etc. Therefore, all normal domain management and security requirements can be developed using this environment.

Quest owns the domains: www.milwaukeequest.com and www.milwaukeequest.org. These Domains are reserved to become part of our overall IT and Stakeholder Development Strategies. The domains are in the name of TLDS and expire 8/23/12.

Mission critical data will be stored locally, on the local server. This is the type of data that if lost, could render Quest inoperable or require significant use of resources to recover. It is therefore a wise investment in time and resources to ensure that IT solutions are in place to mitigate these risks. Examples of this type of data are: Financial data, human resource data, and analyses of year-over-year data.

IT Solution Deployment

As Quest is developed, IT solutions must be developed, implemented and evaluated. Moving IT solutions into stakeholders' hands so their needs are met is the process of deployment. Each stakeholder has different needs. For Board members it might mean access to organizational data that is sufficiently abstracted that it makes sense to them. For students, IT deployment involves designating how students gain access to the technological tools that have been provided for them.

Figure 4. Mock-up Student Screen.

Just as an analysis of stakeholder communication needs will reveal the best methods and systems to use for communicating to stakeholders, this type of stakeholder analysis will reveal the best interface and tools for: students, teachers, administrators, and other staff members. A mock-up of a student screen appears in Figure 5.

Quest will develop policy and procedure to ensure that all vital data is covered by a policy on how and where it is to be backed up. The policy will cover remote data as well as local and server data.

IT Services Delivery and Support

IT Support services will be administered through Web Helpdesk. Metrics for uptime and data traffic will allow for ongoing optimization of IT services. When these metrics receive attention, proactive measures can be instituted to mitigate service impacts from adverse network conditions or other technology issues.

Quest will develop a service level promise for its schools that strikes the balance between cost and responsiveness. This strategy will require hiring an IT consult of at start up and a Director of IT in the 2nd year of operation. As the IT requirements in Quest schools increase, this position will become integral to effectively planning and implementing IT services.

Supporting IT services also will require providing asset tracking and management services to ensure that the cost of ownership remains a low, controllable cost. Most of this asset tracking will be done electronically, via bar codes, to keep costs low.

Managing IT Knowledge

Ongoing analysis of Web Helpdesk tickets and resolution patterns will point to areas where help files and videos can be developed and posted. New user training at the student and staff level will be informed by careful analysis of this information, avoiding unnecessary future expenditures and holding overall costs in check, while providing quality service to stakeholders.

Changes to the network environment will be tested and assessed, prior to implementation. Overall costs of maintaining the IT function will be assessed each year to ensure that the strategy of out sourcing remains cost effective. However, by managing the data from Web Helpdesk, Quest will be able to inform any decisions regarding the future direction of the Quest IT function.

Quest will develop and maintain a 3 year technology plan. The plan will be collaboratively developed with the assistance of school leaders. This type of plan helps inform budgeting and planning by proactively ensuring that cost and design factors receive attention, prior to budget completion. It also ensures that elements of the strategic plan are articulated properly in overall budgets and in the planning of the IT function. The Phase 1 tasks related to IT Management are listed here.

8.0   Financial Management

The financial health of a school, as with any enterprise, requires the expertise of professional and competent financial planning, management and execution. There is probably no other functional area that can adversely affect a school's operation, in so short of a time, frame than the area of Finance.

School finances are peculiar, in that categorization of revenue and expense (per pupil, ESEA, grants, etc.) is unlike many organizations.

Refer to the Financial Policies and Procedures Manual for a complete set of financial operating instructions.

9.0   Facilities Acquisition, Construction, and Maintenance

Quest has performed preliminary facility analysis and is aware of the need to gain enough quality facility space to support the organizational strategy. The processes that will be of concern in this area include:

Property Design and Construction

Quest will establish a separate limited liability corporation (Quest LLC) which will hold and manage its facilities. This organization will be under the direction of Quest board and managed by the CoS. It will provide Quest with the advantage of providing facility services to each school at a fixed cost to schools. The advantage for the schools is that each will pay the same cost, regardless of the building they are in and be freed of having to deal with facilities issues.

For Quest to achieve its overarching strategy, it may need to build new facilities. Building new facilities requires an organizational structure and staff resources to ensure that time-lines and milestones are met. The Quest LLC will have the responsibility of confronting various construction challenges and working through them to develop and implement alternatives.

Modifying existing facilities so that they meet the needs of Quest students and staff is less demanding, but, not by a huge factor. Even minor build outs can expose unknown issues that must be confronted and dealt with. The Quest LLC will have the primary responsibility of supporting this area.

Classrooms and Furnishings Maintenance

Maintaining classroom appearance and the state of the furnishings is important enough that processes need to be developed to ensure that all instructional space is well maintained. Quest will use the Web Helpdesk to provide the same type of data will be tracked for its IT function. The same benefits that IT will receive (cost, frequency of repair and responsiveness) will be available to the rest of the maintenance function and to Quest as a whole.

This centralized approach will allow needed resources to flow to areas of need, during the times of the greatest need for those resources. It will still be the responsibility of each School Director to escalate urgent issues, but the CoS will assist Quest schools in the routine and not so routine maintenance of classroom spaces. Attention must be paid to the cost of replacement and compared to the budget established for furniture replacement.

Classroom Furnishings and Disposition

All fixed assets have useable life spans. Monitoring the age of these assets (desks, chairs, white boards, projectors, phones, etc.) and their condition can help to avoid unplanned expense. However, when fixed assets do have to be replaced, the method of disposal should be documented. This includes,

donating equipment and the value at donation. Refer to the Fixed Assets section of the Quest Financial Policy and Procedures Manual for more information.

Physical Risk Management

Physical facilities have physical risks associated with them. These need to be assessed periodically and proactively planned for. Mitigating risks in this area includes setting policy regarding safety and security and role definitions around whose responsibility it is to monitor facilities during and after the school day. It is the School Director's responsibility to implement weekly walk-throughs of our facilities to uncover any unknown threats. This will heighten awareness of and to speed remediation of possible risks.

Capital Asset Management

Quest will maintain asset identification and tracking processes to know where all assets of a given value are and if they are currently in use or out of use (not functioning). This will be done through serialization and tracking and a yearly physical audit.

Asset age and usable life will also be tracked. This information will be compared to maintenance information, assessable via Web Help desk, to ensure that capital assets are adding to the mission and not costing more than their current value is bringing to the organization. The Phase 1 tasks related to the Facilities are listed here.

Additional details on accounts to use and other procedures are in the Quest Financial Policy and Procedures Manual.

10.0   Environmental Health, Safety and Security Management

Quest will need to manage site safety for all stakeholders (students, teachers, parents, staff, and any visitors). To ensure that leadership is proactive in this regard, the following process areas will be implemented:

Determination of Environmental Health, Safety, and Security Risks

Every site, old or new, must be evaluated for health and safety risks. In older buildings, asbestos abatement may need to be completed or at least mapped out, as part of understanding the overall costs of ownership. In newer buildings, outgassing from building materials might require extra ventilation to avoid students and staff from becoming ill.

Older buildings can also be adjacent to brown fields, where in-ground and underground contaminants can create issues if students were to track dirt into the school. Building issues can become exposed upon taking on a remodeling project, where walls that were covered over now are visible and not to code, and then require remediation, prior to completing the remodeling. In these cases, all exposure risks need to be evaluated and remediation put in place to eliminate or mitigate the risks to all stakeholders.

Development and Execution of Health, Safety, Security, and Environmental Programs

Quest will develop programming to ensure that continuous improvement is a focal point for all health and safety related issues.

Quest will develop and execute periodic audits to ensure that risks are mitigated and that remediation efforts have been successful. The audits will also include reviews of policy and procedures to assess their effectiveness. Audits will range from safety walks by the School Directors to CoS management visiting schools to conduct more formal systems appraisals.

Training and Education of Employees

Employees are the first line of defense for safety and security issues. All employees must aware of the possible hazards that exist. Additional training may be required to prepare employees for any actions they must take, when a hazard must be mitigated. Employees must be trained to report even minor issues, e.g. water on the stairs, broken windows, etc. so that these issues can receive immediate attention.

Staff must also report issues that affect the security of the school, like a door that won't close, or a lock that seems weakened. These issues are above the level of detail that most staff members might feel comfortable with and will need to become part of the Web Helpdesk resolution process.

Monitoring and Management of Health, Safety, Security, and Environmental Programs

Monitoring hazards to ensure that they receive remediation will be accomplished through the Web Helpdesk function. Any health and safety tickets that are open more than 48 hours will receive additional attention from the School Director.

Costs related to safety and security should be monitored. Changes in these costs can be early warning indicators of impending issues. Avoidance of undue costs can be accomplished by monitoring trend lines for these issues.

Compliance with Regulations

Quest will use its extensive relationship network to ensure that all compliance requirements are understood and met. When required, additional professional development will be obtained or consultants engaged, so that all regulations are understood and complied with.

Remediation Management

When unsafe or perilous conditions cannot be immediately remediated, the work must be contracted to external entities that can accomplish this work in a timely fashion. Managing the expectations and deliverables will be the responsibility of the ED and then delegated to the Director of Management services, once he or she is hired. The Phase 1 tasks related to Health, Safety and Security Management are listed here.

11.0 Managing Intergovernmental and Other Agency Affairs

Building and maintaining relationships with funders is important work and needs to be planned and intentional. For this reason, a short-term consultant will be hired to be involved in this work until Quest can support a staff position. Functions in this area include:

Funder Relationship Building

Quest has made every effort to control start-up and on-going costs. However, at start up, Quest will require funding above the per pupil allocation to develop an organization capable of providing the type of education experiences we envision. We will solicit this funding from interested 3rd parties.

Management of Government and Other CMO Relationships

To ensure the long-term viability of Quest, the ED and whomever it is delegated to, will work at building effective and productive relationships with the Wisconsin Department of Public instruction, the City of Milwaukee's Charter School Office and all other external stakeholders who have major vested interests in Quest

Using solid relationship management principles, Quest leadership will undergo periodic training, professional development, and coaching in the area of relationship building to ensure that Quest management has the best preparation possible to develop, grow and protect key relationships.

Relationship with Quest Board

The Executive Director will have the primary responsibility of managing the Quest leadership's relationship with the Quest Board. The relationship should be one that includes a high level of collaboration. Quest management will receive periodic opportunities to interact with the Quest Board during strategic planning and other organizational assessment and development activities.

Management of Legal and Ethical Issues

A code of ethics will be developed to help provide boundaries to employee behaviors. This will become part of new employee on-boarding.   Management staff will receive professional development in this area to assist them with recognizing situations that might prove difficult to navigate on their own. Through effective professional development and on-going management meetings, most issues will receive proper attention. More complex legal issues might require the retention of proper representation.

Public Relations Program

Along with effectively managing key stakeholder relations comes the area of effective public relations. This includes managing the public's perception of the Quest image. This often comes into play during times of crises, but must receive attention before any crises occurs.

Media relations training and preparation must be planned for and accomplished soon after Quest becomes operational. The community stakeholders should receive positive messaging regarding the value that Quest brings to the community as well as the value it will bring in the future.

A communications protocol for crises events will be established. The protocol will be part of the on-boarding process for Quest employees. There will be one designated contact for external media relation needs. In the event that a crisis does occur, this contact will be the designated voice for Quest. The Phase 1 tasks related to managing intergovernmental affairs are listed here.

12.0 Knowledge Management, Organizational Improvement, and Change

Knowledge Management is an important aspect of any organization that seeks to improve itself. Quest has designed this competency into its structure. The School Operating Processes and Center of Support Services will receive continuous improvement to ensure that the Quest Vision, Mission and Values are being fulfilled in each school and by the CoS.:

Knowledge Management Strategy

Improvement teams

Creating semi-public accountability for results can produce the benefit of teams working passionately to obtain those results. This may be the best way to ensure that improvement needs and

Team Name and Chairperson	Team Focus
School Leadership Team – Chair: Executive Director	• Overall school metrics • Center of Support process improvements • Quest culture and communications
Culture and Discipline Team – Chair: Director of School Services	• School culture metrics and observations • Consistency in coaching and discipline • Professional Development needed for staff
Data and Curriculum Team – Chair: Director of School Services	• System improvements • Interventions needed
School Operations Team: – Chair: Director of Management Services	• Center of Support process improvements • Finance, IT, and Human Capital needs • Facilities support issues

Table 6. Quest Process Improvement Teams.

accomplishments are as transparent as possible. Key initiatives and action items owned by these teams will be shared with all Quest employees via an intranet page to help build an environment that respects and expects continuous improvement. The teams listed in Table 6**.** are envisioned to drive and sustain continuous improvement efforts.

These teams will meet periodically (weekly, bi-weekly, or monthly) to assess performance and develop improvement plans for each focus area. Communications cascading will be used to share accomplishments and the remaining challenges that exists in each focus area.

Quest teams will use tools generally accepted outside the world of education to evaluate and improve all of its operational aspects. Some of those tools appear in Table 7

Tool Name	Description
Cost of Quality	A method of tracking expenses related to quality and shifting those expense so that more is spent on proactive measures versus reactive measures. In other words, attempting to drive leading indicators instead of lagging indicators.
DAMIC	The acronym stands for Define, Analyze, Measure, Improve and Control. It is the preferred problem solving methodology in what has become known as six sigma quality. Quest will use this process for academic and non-academic needs and will consider teaching it to students as part of the curriculum.
Five Whys	A method of clarifying root cause by asking "Why" five times. Generally, by the 3rd or 4th "Why" it becomes clear what are symptoms and what was the root cause.
Flow Charting	A method of visually documenting a flow of information, goods or objects that facilitates a high degree of mutual understanding.
QFD	Quality Function Deployment is a qualitative tool for ensuring that customer or organizational design goals are properly articulated in the final design of a service or good.
Statistical Control	Using statistical analysis to understand sources of process variation and control those sources to limit variation.
Value Analysis	A method of reviewing existing and new processes to ensure that all facets of the process and value to operations. Those that don't are eliminated, unless they are related to compliance requirements.

Table 7. The 7 Quest Continuous Improvement Tools.

Performance Benchmarking

Benchmarking is the continuous process of measuring products, services and practices against the toughest competitors or those organizations recognized as industry leaders. Quest will implement an on-going benchmarking process to ensure that best-in-class processes and practices are assessed and become part of the organizational learning for Quest.

The APQC developed Process Classification Framework (PCF) allows for on-going benchmarking. The Education PCF allows Quest to effectively share benchmark results with participating schools across the country and to develop and implement improvements that are very targeted in scope.

We have continued our discussions with APQC asking that Quest have access to existing benchmarking studies as part of a reduced fee membership program that APQC intends to implement for smaller organizations.

Quest-Wide Knowledge Management Capability

The purpose of Knowledge Management is to allow and organization to benefit from the collective knowledge that resides in that organization by using that knowledge to achieve the organization's mission. This area of organizational sciences is undergoing a rapid evolution, in part from the maturation of several technologies; including blogging and other social media.

The implications of this rapid evolution may have profound impacts for Quest because this may be the first time in history that there is such a strong confluence of knowledge management, social media, and substantive research on what works and what does not in schools. An organization that embraces these three practices should be able to shorten learning times and be able to adequately absorb steep learning curves, during its growth and beyond. Our intention is that Quest will be the type of organization that can learn from its challenges and adapt and improve as it faces each new challenge.

Change Management

Quest will institute an effective change management from its inception. Successful frameworks for change involve many of the steps in Table 8.

Steps	Steps in the Framework for Change
1	**Assess**: Analyze the data for an accurate diagnosis of the "as is" situation and create and understanding of the change problems
2	**Plan**: Articulate and define the tactical change process required to bridge the gap between the "as is" and the "to be".
3	**Implement**: Support and reinforce commitment.
4	**Renew**: Involve and empower people toward a shared vision and a cultural change.

Table 8. Framework for Change

Changes to documented Quest processes should be planned and instituted in a way that provides the smoothest implementation path for the organization. Major changes should have a 'break in' date that falls on the quarter, i.e. July 1, October 1, January 1, or April 1. Using the agreed upon break-in date, the team or manager responsible for the change should establish milestone dates that allow for proper communication of the change and any training or other preparation that needs to occur, prior to the change implementation.

Summary of Process Areas and Responsibilities

The functions described above in the 12 process areas will be executed at each staffing level and do not require a fully staffed CoS to implement. During phase 1, when the Executive Director is the only staff member in the CoS, the support functions will be accomplished by him with the assistance of external consultants.

The processes called for in sections 1.0 through 12.0 will be mapped or flowcharted, prior to them being implemented. As the first school is developed, the first interning director will be relied upon to assist with much of this development. As the other schools are under development, these processes will become part of the interning School Director's on-boarding process.

During Phases 2 and 3 of our growth, as additional support staff are hired, the work will be transitioned to those staff members. This redistribution of duties is shown as part of the Quest Responsibility Growth Matrix in the Business Plan. The school based processes will be reviewed, improved and implemented as each new school developed.

Relationship of Schools to the Center of Support

The relationship between the CoS and Quest schools will be a collaborative relationship. School personnel need to feel that the CoS is providing valuable services that allow schools to focus on the business of education. Staff members at the CoS must believe in and use servant leadership as the lens through which they provide services. This criteria will become part of the selection process for CoS personnel.

Green Light Procedure

Prior to opening our 2nd school, we will assess several criteria. If these criteria are met, the Quest Board will give the Executive Director the 'green light' to go Phase 2 of our growth strategy. These criteria include, but are not limited to:

- Have we secured a school director?
- Have we secured a solid building in which to place our next school?
- Have we met at least 70% of our authorizer's metrics (or are there enough metrics solidly trending upwards to demonstrate our model's long-term efficacy)?

Quest 2013-14 Student/Parent Handbook

Greetings from Quest

Dear Parents and Students,

Welcome to the 2013-2014 school year at Quest! The administrative team is excited about this coming school year, and the staff at Quest is caring, competent, dedicated and willing to assist you. We are working very hard to provide the best possible learning climate for students.

We believe that education is a shared responsibility and that the successful operation of a school depends on the cooperation of everyone concerned: students, parents, and staff. The mission of Quest is to create a partnership among the members of this triad. Each of us is responsible for doing our part to make our school a place where we can work and study together in harmony.

Quest is a reflection of all of us. All of our policies are intended to provide a safe and orderly environment that will be conducive to learning. Our faculty and staff look forward to sharing their expertise in academics, special programs, and extracurricular activities. We encourage you to get to know your school, its programs, activities, and schedule. Become an active participant in our school. Get involved through classes, clubs, and activities.

This handbook is an overview of our school's goals, services, and rules. It is an essential reference book describing what we expect and how we do things. Read it carefully, discuss it with your parents, and let it act as a guide for your effective involvement in all parts of the school. It has been written to provide you and your parents with the information that will make your year purposeful and rewarding in every aspect. Keep this handbook because you will use this information throughout the school year.

Please note that while we have made every effort to give accurate and current information, we may have missed something. Any changes to this handbook will be made in writing through our school newsletter and will also be updated on our school website.

On behalf of the entire Quest staff and community, best wishes for a great 2013-2014 school year!

Sincerely,

School Director

About Quest

Mission

The Quest mission is "To ensure that all of our students are college ready at graduation".

Quest Beliefs & Values

Quest believes in serving low-income and underserved communities by:

1. Preparing students for life-fulfilling options, including: attending college, joining the workforce, becoming an entrepreneur, or actively participating in the democratic processes of this country,
2. Creating an expectation of doing one's best in each endeavor,
3. Addressing the individualized needs of each student,
4. Providing a quality investment in human capital,
5. Facilitating effective parent engagement, &
6. Creating a school commitment of reinvestment in our community.

School Culture

To achieve our mission, every member of the Quest Community must respect the rights of all members of the community to learn. This means creating an environment that is physically, emotionally and intellectually safe, orderly, and conducive to learning. The information in this handbook provides the guidelines for all of our behaviors and attitudes that will create a positive environment in which each student, parent, and teacher can contribute and learn. Because this is a "Student/Parent" Handbook, it is written to you. Each section begins with a general description of the issue involved, and then it addresses you and your actions and attitudes very specifically.

In order for Quest to be successful in this endeavor, Quest students observer and embody certain rights and responsibilities. These are listed below:

Students' Rights
- To feel safe in the school environment
- To take full advantage of the learning
- To work in an environment free from disruptions
- To express their opinions, ideas, thoughts,
- To have a healthy environment that is smoke, alcohol and drug fee,
- To expect courtesy, fairness, and respect from all members of the community,
- To use school resources and facilities for self-betterment under appropriate supervision
- To be informed of all expectations and   school and its community, participation in school activities, and
- To have the right to due process.

Students' Responsibilities
- To respect and protect the personal and property rights of others and of the school,

- To treat all members of the community with full respect, fairness, and courtesy
- To abide by all the expectations of the responsibilities
- To follow the prescribed guidelines for
- To take part in a variety of school activities
- To do his or her best to learn and master all opportunities he or she can,
- To respect school rules, regulations, and policies
- To be caring and honest,
- To be sure that personal expressions do not and concerns interfere with the rights of others,
- To follow state law and school policies smoke alcohol, and drug free, concerning substance abuse,
- To adhere to due process procedures.

Dress Code/Personal Appearance

Quest has a dress code policy to help create a safe and orderly environment, instill discipline, and eliminate the competition and distractions caused by varied dress styles. You will be expected to arrive in dress code every day. Please cooperate, display modesty and neatness, and take pride in these clean, neat and attractive uniforms. We rely on your common sense and your parents' and/or guardians' support in helping maintain this dress code. Dress Code information was given to all admitted students in the application packet. If you need further uniform information, please call the school office.

You should know that the school uniform policy is strictly enforced in our school. Make sure your child wears the school uniform on the first day of school. Your child must come to Quest every day in their uniform.

Students will have the opportunity to buy uniform shirts and sweatshirts at orientation and throughout the school year. Logo shirts and sweatshirts may be purchased through the school office. School apparel is available at a reasonable cost in the school office before or after school only.

Shirts:
- School uniform shirts may be purchased at orientation or any time before or after school in the office for $15.
- Shirts MUST be either tucked-in or hang naturally. Shirts cannot be tied or bound at the bottom.
- Sweatshirts, sweaters, or long sleeve shirts may be worn under the school shirt, but they must be tucked in and not visible at the bottom of the shirt. Shirts underneath should be a solid color without writing, designs or pictures on them. Hoods on sweatshirts, sweaters, or shirts are not allowed. Jackets or coats are not permitted under the school shirt.

Hair:
- Hair color must be a "natural" color. Unnatural colors dyed into the hair are not permitted. Hair cuts/styles must be professional looking; no Mohawks are allowed. Hair color should not be a distraction to the classroom.
- No texturing/cutting words, letters or designs into the hair.

Shoes:
- Students must wear shoes in good repair with their toes and heels completely covered. Laces must be tied properly. Heels must be one inch or less. Boots may be worn under pants only. Sandals, slippers, or flip-flops are not permitted.

Pants / Skirts / Belts:
- Students must wear tan, blue or black pants/jeans with their uniform shirt. Girls may wear a tan, blue or black skirt. Student pants or skirts must be at waist level (at least 2" from the belly button) and must completely cover the knee.
- Pants must be worn properly at the actual waistline; no sagging pants allowed.
- **Important Notice:** Pants must be a solid color tan, blue or black with no photographic pictures or caricatures, no artwork, no elaborate designs, no cartoons, no symbols, not even if the brand name is incorporated into the picture, cartoon or design. Only the manufacturer's name or logo is permitted anywhere on the pants and the text or logo must be one inch or smaller and not replicated. No handwritten text or original artwork is permitted anywhere on the pants.
- Pants/jeans must be in good repair, no holes, or fraying. Pajama bottoms, jogging pants and sweat pants (or pants made of similar design or material) are **not** allowed.
- Belts must be solid colored black or brown and can only be worn in pants belt loops (not over the school uniform shirt). Chain belts are not permitted.
- Pants cannot be rolled up to display socks. If visible, socks must be the same solid color with no words or inappropriate designs.
- Boxers, biker, gym, running shorts, or any tight fitting shorts are not allowed. Gym shorts may only be worn during gym class.
- Leg warmers and boots cannot cover the pants. Both must be either tucked under the extended pants leg or be removed while at school. Leggings and lacey style leg warmers are not to be visible and must remain hidden under pants legs.

Head Gear:
- Hats, caps, doo-rags, and headgear may not be worn in the building, except for religious reasons and then only with a prior written note from their parent or guardian.
- All headgear must be removed upon entering the building. Girls may wear hair bands of one inch or less as long as they are not a distraction in the classroom. Scarves worn as hair bands are not permitted.
- Headgear must remain off the head until AFTER leaving the school building (this includes during after school activities).

Jewelry:
- Jewelry should not be a distraction to the classroom. Ear rings must be less than 2 inches in length.

Sweaters/Jackets:
- No jacket, coat or hoody of any kind may be worn in the building.

- The Quest sweatshirt (with school logo) may be worn over or in place of the school uniform shirt.
- Weight or strength vests are not permitted (even under uniform)

Bags / Purses:
- Only clear, see-through backpacks or purses are allowed in classrooms. All other backpacks and items must remain in lockers.
- Keep all personal hygiene items in your lockers.

Facial / Head Decorations:
- Grills and tongue piercing are not allowed. However, a single, non-disruptive facial piercing will be permitted.

Disclaimer:
These rules are intended to cover the majority of anticipated clothing and fashion issues; however, the Quest administration reserves the right to modify, add, or clarify rules as needed in order to limit classroom distraction and maintain overall school safety.

Academics

Grading Scale
All classes at Quest will follow this standard scale for assigning letter grades for quarter and semester work. Individual teachers will establish the grading policies and procedures for their classes, and their grades will correspond to this scale.

A+	96 - 100%	Mastery
A	90 - 95%	
B+	86 – 89%	Exceeds Standards
B	80 – 85%	
C+	76 – 79%	Meets Standards
C	70 – 75%	
D	65 – 69%	Approaching Standards
F	64% and below	Not at Standards

Incompletes (I) will only be given in extreme circumstances when a student has a plan for completing the missed work.

Homework Policy
Homework is an essential part of your successful educational program at Quest. Doing homework will help you develop many valuable skills such as good study habits, time management, responsibility, and perseverance. Teachers will assign homework that will foster individual learning and growth and that is appropriate for the subject area. Homework is part of all students' regular evaluations. It is your

responsibility to complete and turn in homework on time. If you are absent from school, it is suggested that you still turn in your homework electronically, if possible.

If you or your parents have Questions about homework, immediately contact the teacher who assigned it. The teacher determines homework due and final make-up dates for the quarterly projects. Teachers have individual policies on late work, so be sure to check each teacher's syllabus for information.

Matriculation and Summer Bridge

Matriculation at Quest will be based in part on the three grade-level groupings of:

- The 6th and 7th grade students,
- The 8th through 10th grade students, and
- The 11th and 12th grade students.

Students will be recommended for advancement from one grade grouping to the next, based upon the work they are doing, i.e. a student performing on a 6th grade level would not be recommended to advance, to the 8th through 10th grade grouping. Their level of competency will be determined by: their NWEA-MAP assessments, the level of the work they have mastered on the instructional platforms, and assessments of their project work.

If a student is not recommended for advancement, a parent may specifically request an advancement, based upon performance during the summer bridge program or work accomplished during the summer months. Quest reserves the right to re-enroll that student into a grade level that is more appropriate to the student's performance level.

The Summer Bridge program will be conducted for 3 weeks, beginning the 2nd week of August. Students will be required to attend, based on assessments performed during Boot Camp or an agreement to allow the student to advance, contingent upon attending the Summer Bridge program. Continued enrollment at Quest may be based on attendance in the summer bridge program.

The Summer Bridge program will consist of intensive iterations of assessment and instruction, aimed at strengthening student skills in reading and math. A variety of activities, in and out of school, will be used to engage students into the curriculum and give them a head start on the upcoming school year.

Illness, Injury, And Medication Policies

If you are ill, you must go to the office. There you will have the option to call home and get permission to leave or arrange to be picked up.

Medication Policy:

Medication should not be brought to school unless it is essential to the health of the student. If your child needs to take a prescribed medication that is taken once daily, if possible; please have your child take this before coming to school, or in the evenings. If a student must take medicine at school, these procedures must be followed:

- The school must receive a Medication Administration Directions Form signed by the student's parent/guardian.
- The students name must be printed clearly on the medication bottle.
- All medication will be kept in a secure location in the office.

Students are not allowed to carry any medication with them to school. Aspirin, Tylenol, and other patent drugs are not available from school. Students may carry their inhalers.

Pupil Services

The guidance counselor and the school social worker are available to help students with any personal, social, educational, or vocational problems. Confidentiality is always kept with the exception of situations that will endanger the lives of the student or others.

Lockers

Each student will be assigned a locker for his/her individual use at Quest. This locker is for storing books, coats, and personal items necessary for school. The lockers should not be used to store valuable items you bring from home. Quest will not be liable for personal items you leave in your locker or bring to school with you. To keep your school items safe, we strongly advise you to keep your locker private. Do not trade lockers with another student. Do not let another student share your locker since it is a violation of the school policy. It is your responsibility to see that your locker is kept locked and in order at all times. You should report any damage, vandalism or non/working condition of your locker to the office. If you do not report vandalism, damage or non-working condition of your locker, you will be held responsible for it.

Only a school supplied lock may be used at quest. Any other lock will be removed and discarded at the owner's expense. School locks may be purchased for $10.00 at the start of the school year. Upon return at the end of the school year, locks may be sold back to the school at the administration's discretion for $5.00 each.

- Locks issued by Quest in prior years must be approved and signed-in prior to placement on a school locker. Non-approved locks will be considered a violation of school property and will be cut-off and discarded at the owner's expense.
- Please remember that your lock and locker are school property and remains at all times under the control of the school; however, you have full responsibility for the security of your lock and locker and what is stored in your locker. Periodic locker checks with or without student permission will be made by Quest administration to ensure that lockers are kept clean and orderly.
- Students requesting a locker change or lock exchange will be assessed a $15.00 processing fee paid at the time of the exchange. Students may not put their own locks on the lockers. Illegal locks will be removed and not returned to the student.

Lost And Found

There is a lost and found box in the school office. If you find books, clothing or personal items on the school grounds, please bring these items to the office. If you lose something, check the lost and found.

Lunch Periods

Quest has a closed campus. All students must remain at school during the lunch period. There are microwaves available if you need to heat your lunch. If you have a special situation, you will need to meet with the administration. During the lunch period, you will be expected to display good manners and courtesy. You must eat your lunch ONLY in the lunch area. You will be expected to clear your place and dispose of all trash appropriately. No food or beverages are allowed out of the cafeteria area. Teachers who are on duty during the lunch period will hold you responsible for your behavior. There are two lunch periods. The first period is for middle school. The second one is for high school. The following are the LUNCH ROOM RULES AND REGULATIONS, which must be followed or there will be disciplinary action:

The cafeteria area is where food is to be eaten. Do not sit on tabletops. Clean up after yourself. Throwing food or garbage is not allowed—even into garbage cans. If you throw something on the floor, you may be asked to clean the area and you will be disciplined.

Dress code will also be enforced during lunch.

Do not take food or drink into other areas.

- State Law requires students to follow any instructions given by an adult as soon as possible and without hesitation or argument. If any lunchroom supervisor gives a direct instruction, students must do as told or face the consequences.
- No CD players or MP3 players are allowed in the school. These items will be confiscated if found. If found, they will be confiscated for a minimum of 9 weeks (equivalent to one quarter).
- There will be no play-fighting or running allowed anywhere on school property. If you are caught play fighting in the cafeteria or gym, you will be disciplined.
- Students are not allowed to carry any opened drinks or food of any kind outside of the cafeteria. The only exception is a planned class party. Students are only allowed to buy products from a vending machine during lunch periods. Gum is not allowed in school at all.
- Students are not allowed to leave school grounds, at any time of day; unless they are given permission by the administration.
- Students are not allowed to leave the cafeteria without permission from the person in charge.
- Students may not leave the cafeteria to go to their locker or to a teacher's room without a pass from a teacher. NO EXCEPTIONS.

Public Areas: Hallways, Stairwells and Bathrooms

Hallways, stairwells, and bathrooms are areas used by all members of Quest. Because everyone uses these areas, there are rules of conduct that all students must follow:

- Do not loiter in the halls, lunchroom, bathrooms, or on staircases.
- Do not eat in halls, bathrooms, on staircases, or classrooms.
- Do not run in the halls, lunchroom, bathrooms, or on the staircases.
- Do not use any profane or vulgar language.
- Do not yell, scream, hit lockers or otherwise make excessive noise.
- Do not roughhouse, push, wrestle, or play fight.
- There will be no birthday spankings/beatings given.
- Report any leaks, spills, or other problems in the bathroom to a teacher or the office.
- Students should stay on their assigned floor of school unless they are going to scheduled classes or have written permission from a faculty member.

During class time, students should not be in the halls, stairwells, or bathrooms without a pass from their teacher or the main office. Students who disregard these rules will be sent to administration for disciplinary action.

School Activities

Quest will offer a range of activities that will enrich student learning during the school day and after school. Because the safety of students is very important to us, specific rules will apply to these activities.

Field Trips

Field trips offer exciting ways to learn. Quest students will have the opportunity to go on field trips at various times throughout the school year. For all field trips, you will be expected to follow these rules:

- You must bring the Field Trip Permission Slip to school signed by your parent(s) or guardian(s) by the specified date. No phone calls will be accepted as permission.
- You must wear your school uniform unless otherwise specified.
- You must abide by Quest codes of student conduct while on the field trip.
- Teachers and administrators have a right to exclude students from field trips based on unacceptable behavior or lack of academic progress.

After-School Activities

There is no better way for students to enrich their education than by taking part in clubs and after-school activities or working with a teacher. These opportunities will allow you to explore things more deeply that you already enjoy and to try other areas that sound interesting. If you stay for an after-school activity, you will be expected to follow these rules:

- You **must** be with a teacher or other staff member at all times.
- You **must** arrange for your own transportation to arrive promptly at the end of the activity.
- You **must** abide by the Quest Code of Student Conduct while participating in the activity.
- **Students are not allowed to stay after school to wait for another student.**

A full list and description of after school clubs and activities will be posted after school starts and students will have an opportunity to explore each one that looks interesting.

Bus Passes

Quest does not offer the free bus service and does not provide free city bus passes. Transportation is the sole responsibility of the Parent(s)/Guardian(s) of the student.

Student Materials

Quest is a blended learning school. As such, most student material will be on-line. However, when that is not the case; Quest will provide students with materials for their classes. At the end of the school year, students must return any books in the same condition that they were given out in. If damage was done to the materials throughout the school year, the student must pay for the damages or replace the materials if it was lost. If the materials are not paid for or the lost books are not replaced, the student's report card/transcripts will not be available until those costs are paid.

Telephone

There is a pay phone for student use outside the main office. This phone should be used in an emergency situation only. Students will not be allowed to use the phone in the main office unless it is an emergency. Teachers will not allow students to make phone calls during class time. If a student comes down to the main office to use the phone for any other reason beyond sickness or emergency, they will be told to return to class. Phone calls can be made after school. Parents should call the school during normal hours to speak with their child only in the case of an emergency. Messages taken for any student will be delivered at the end of the school day. Emergency messages will be delivered during the passing time.

Visitors

Visitors for educational reasons are welcome at Quest. Visitors must register with the office when they arrive. Parents must also check in at the office to pick up a badge for security purposes. Students wishing to bring visitors to Quest must complete the Student Visitor Form and receive approval from the office at least one week in advance. Do not bring guests to school without prior arrangements.

Attendance

If your child is going to be absent or late to school you must call the school office and report this by 8:00 am. If you report by phone you are also required to send us a written explanation.

The Wisconsin Board of Education requires all students enrolled at Quest to attend school regularly in accordance with the laws of the State of Wisconsin. The success of Quest's educational program is based on the daily presence of the students and requires continuity of instruction and classroom participation. In addition, the regular contact of students with one another in the classroom and their participation in well-planned instructional activities under the guidance of a competent teacher are vital to the success of the educational program. For these reasons, the administration, faculty, and staff of Quest will frequently talk about the importance of students being at their workstations and on time.

Promoting and fostering consistent student attendance requires a commitment from the administrators, teachers, parents, and students. No single individual or group can successfully accomplish this task. Members of Quest's professional staff will do all they can to encourage and support student attendance.

This ranges from creating a pleasant and safe physical environment to providing meaningful learning experiences and opportunities in every class. In addition, professional staff will:

- Keep accurate attendance records of excused and unexcused absences,
- Incorporate defined, daily participation as part of the teaching/learning process for each grading period, and
- Require accountability for students to complete work they missed while absent including homework, projects, quizzes, tests, and other assignments.

We ask that you, as a student, do all you can do to attend school every day. If you have any problems with attendance, please talk with a teacher or administrator about them.

Absence and Tardiness

Educational studies show that regular school attendance is a key factor in successful academic achievement, positive social interaction, and high self-esteem of school-age children. Children who attend school regularly are less likely to become involved in drugs, alcohol, and youth violence.

State law requires all children between the ages of six and 18 to attend school full time. A child who has turned 18 must attend until the end of the term, quarter, or semester following his/her 18th birthday.

Excused Absences Defined

It is your responsibility as a parent/guardian to notify the school as soon as possible when your child will be absent. The following are valid reasons for your child to miss school and are considered excusable absences. All other absences are regarded as truancies.

- Personal illness
- Medical/dental appointments
- Family emergencies where the student is needed to ensure family well-being
- Funerals
- Driver's examinations
- Required legal appearances
- Designated religious holidays
- Educational or Quest-sponsored activities approved by the school principal
- School suspensions during the expulsion process, up to 15 days

As a parent/guardian, you also have the right to excuse your child from school for any reason for up to 10 days per year. You must submit a written excuse before the child is absent. Students may complete class work and take examinations missed during excused and unexcused absences without being penalized for their absence. Under attendance policies, you have the right to request a program or curriculum change for your child. Contact the principal. A conference will be held within two days, and a decision made within three days. The decision may be appealed to the Executive Director.

Truancy

Your child is considered truant when:

- He/she is absent for all or part of the school day and you, as the parent/guardian, have not contacted the school with a legal excuse as noted under Excused Absences.
- He/she attends school irregularly but often enough that he/she is not in violation of the state laws that require children to attend school.

A child is considered habitually truant if he/she misses a total of five full or partial days without a valid excuse during a school semester. The school has the authority to reject excuses that do not appear to be substantiated.

Parent Notification of Absence

It is your responsibility to call the school if your child is going to be absent. If your middle school child is not in school and you have not phoned, the school will contact you within four hours of the beginning of the school day. Parents of high school students who do not come to school will be notified within 24 hours.

You will also be notified if your child has had five unexcused absences in a semester. The notification will be in writing and sent by certified mail. The notice will ask you to meet with a school official within five days. (A five-day extension for the meeting date is allowed.) If you fail to meet with school officials within 10 days of notification, the school may take steps to impose penalties on you for failing to correct the truancy problem. These penalties include enforcement of state statutes and municipal codes.

If your child has a truancy problem, contact the school for assistance. Under the Truancy Abatement and Burglary Suppression Program (TABS), students who are truant from school may be taken by the police to a truancy center. School-based student assistance and support services can help you keep your child in school. Truants may also receive municipal citations. Persons who engage in or cause habitual truancy may be referred to the Milwaukee County District Attorney's office for prosecution.

Make-up Work for Excused Absences

- An absence from school, even for several days, does not excuse you from responsibilities in the classroom on the day you return. You will be given the same number of days that you were absent to make up missed work.
- To be eligible for make-up work, you must show each teacher the "excused absence slip." On the day you return to school, it is your responsibility to find out what work is required and when the work needs to be completed.
- If you are absent for school-related reasons or for an anticipated or planned absence, make arrangements with your teacher(s) for assignments prior to your absence.

For students with excused absences, make-up tests will be scheduled at a time designated by the teacher. It is the students' responsibility to take the test at that time. If you fail to do this, the teacher is not obligated to set another time for the make-up. If you fail to make up a test without making other arrangements, the teacher may decide not to give you the test.

Tardiness

Tardy Policy—Please Read Carefully!

Attention Parents: Please be aware of the following changes to our school's tardy policy. Please read the following very closely. All students will be held accountable for being in each class on time every day. THIS INCLUDES FIRST HOUR. Students need to come to school on time. We understand that sometimes there are circumstances where a student is late in the morning and that cannot be helped. That is why students are allowed up to FIVE excused tardies to school per quarter. That means the parent/guardian must call, send a note with the student, or come into the office in person to sign the student in. All other tardies will be considered UNEXCUSED. Also, if a student has already reached their five excused morning tardies for the trimester, all subsequent tardies will be considered unexcused unless the student brings a verifiable notice such as a doctor's note which will excuse a student for further incidents. If you have Questions, please contact the school at (414) XXX-XXXX

Tardiness is defined as a failure to be in the place of instruction at the assigned time without a valid excuse. Tardiness to school and to class—whether the result of oversleeping, missing the bus, car problems, baby-sitting, athletic workouts, socializing, or lingering in the halls—is unacceptable.

School Tardy Policy

Failing to arrive at school on time is a tardy. You must have your parent/guardian call the office and write an explanatory note if you arrive late to school. The school will accept up to five tardy excuses from parents/guardians per quarter. Report to the office and sign in when you arrive. The office staff person will give you a morning tardy pass. You may then proceed to your locker and straight to class. Tardies will also be reset to zero each quarter. The following are the consequences for repeated school tardiness:

- **1st – 6th time:** Warning. Student will sign an acknowledgement form.
- **7th – 10th time:** In addition to the student signing the acknowledgement form, parents will receive a phone call home.
- **11th – 14th time:** In addition to signing the acknowledgement form, student will have an after school 45 minute detention. Student will also receive a written detention notice to take home to their parents/guardians. Detentions will be held Monday through Thursday starting at 2:40pm. If the student arrives late or fails to show up to detention, he or she will receive an automatic day in the Alternative Learning Center (ALC).
- **15th – or time and beyond:** In addition to signing the acknowledgement form, student will be referred to Dean of Students for further disciplinary action.

Class Tardy Policy

Failing to attend class on time is also a tardy. When the bell rings, students should be inside their classrooms and the teachers will close the classroom doors. If a student is left in the hallway, they must report to Room #210 to get a tardy pass. Tardies will be counted and accumulated for all class periods combined each quarter. Tardies will also be reset to zero each quarter. The following are the consequences for repeated tardiness:

- **1st – 6th time:** Warning. Student will sign an acknowledgement form.
- **7th – 10th time:** In addition to the student signing the acknowledgement form, parents will receive a phone call home.
- **11th – 14th time:** In addition to signing the acknowledgement form, student will have an after school 45 minute detention. Student will also receive a written detention notice to take home to their parents/guardians. Detentions will be held Monday through Thursday starting at 2:40pm in room 205.
- **15th – or time and beyond:** In addition to signing the acknowledgement form, student will be referred to Dean of Students for further disciplinary action.

Excused Tardiness

You must have your parent or guardian call the office and write an explanatory note if you arrive late to the school. Report to the school office immediately when you arrive. If you fail to do this, you will receive an unexcused tardy.

Unexcused Tardiness

If you arrive at school late but without a dated and signed note, report to the office to check in. You will get a "late slip" for admittance to your class. You will have two days to bring in a note to change this to an excused tardy. If you are tardy for the first period class, you must sign-in before going to your first hour class.

Class Tardiness

If you are late between classes, you will be marked tardy for that class.

Early Dismissal of Students from School

Because Quest is very concerned about your safety and well-being, early dismissal from school is an important issue. In all instances of early dismissal, the following precautions will be taken to insure students' safety.

- Administration may release you before the end of a school day only upon presentation of a written or face-to-face (no telephone call) request from your parent or guardian or for emergency reasons.
- Students may be released only to a parent or guardian whose signature is on file in the school office or to a properly identified person, authorized in writing by the parent or guardian to act on his/her behalf.
- Students may be released "on his/her own" only with verified parental permission.
- No staff member shall permit or cause you to leave school prior to the regular hour of dismissal except with the knowledge and approval of administration and with the knowledge and approval of your parents or guardian.

Student Conduct and Discipline

Quest prefers to conduct its own student discipline and consequence program; however, Quest will contact the Milwaukee Police Department:

- Whenever a student becomes uncontrollable,
- Will not leave the premises when directed to do so by administration,
- Breaks a municipal, state or federal law,
- Refuses to follow our school consequences,
- When a student threatens the safety of another person, or
- Whenever the Quest administration deems necessary.

Important Notice:

State law requires that teachers receive the same respect as a police officer while at school. Any hitting or pushing of a teacher or threats made about a teacher can lead to a felony charge with a maximum of 10 years in prison and/or a $10,000 fine. This applies to all students at Quest.

Quest has the goal to help every student fulfill his or her intellectual, social, physical and emotional potential. Everything in and about the school has been designed to create an orderly and distraction-free environment in which all students can learn effectively and pleasantly. To foster this kind of learning environment, the Quest administrators and teachers shall not allow any of the following behaviors during school, on school property, or at or during any school-sponsored activities:

Students at Quest will not...

1. **Fight and/or Arrange Fights:**

   Fighting is any instance of physical contact in anger, regardless of whether fists or weapons are used. In all but the rare of occasions in which one student simply assaults an innocent bystander, any fight will involve disciplining all students involved in the fight. All students caught arranging fights, participating in fights, or leaving an assigned area to view a fight will be disciplined which may even include expulsion.

2. **Bring Beepers, Pagers, and/or Other Electronic Devices (that cannot be used for learning):**
   a) Possessing beepers, pagers, , DVD or CD players, (mp3 music or video players, Game Boys or similar game players, and/or similar devices are not allowed on school property. They disrupt classes and distract others from learning.
   b) If a student is caught with any of these items in his/her possession the item will be confiscated. If the student refuses to turn over the item, the student will be suspended or the police will be called for "disorderly conduct."
   c) These electronic devices must be stored in your locker and cannot be removed for any reason until you leave the building at the end of the day.
   d) If your parents need to get a hold of you during the day, they are to call the school number (414) xxx-xxxx and a message will be forwarded to you immediately by classroom telephone, intercom or note.
   e) If an electronic device other than a phone is confiscated, it will not be returned until the end of the school year or equivalent to one quarter (nine weeks) whichever is sooner. Cell phones may be returned the first time, but only if a parent or guardian comes to the school to claim the item and signs a cell phone contract.

The cell / electronic devices policy is as follows:

- **1St time:** Device is confiscated and given to the Dean of Students, detention after school in Dean's office, parent must pick-up device and sign a cell phone and communication device contract.
- **2nd time:** Device is confiscated and given to the Dean of Students, 2-3 days ALC or 1 day suspension, device will be held for minimum of one quarter (9 weeks) or until the end of the year, whichever is sooner.
- Electronic devices (non-phone/beeper/pager related): Device is confiscated and given to the Dean of Students, 2-3 days or 1 day suspension, device will be held for minimum of one quarter (9 weeks) or until the end of the year, whichever is sooner.

3. **Cheat and/or Plagiarize:**

    Cheating on tests, plagiarism, and/or any other types of deception to get credit without effort are unacceptable conduct. Each teacher sets his/her own standards of behavior for his/her classroom, and students are expected to know the standards and procedures for each of their classes. The administration has reviewed and accepted and will support individual teacher standards and procedures for cheating and plagiarism. Cheating and/or plagiarizing will result in the following minimum discipline and the teacher will issue a failing grade for the assignment:

    - 1st time: Teacher call home; referral to Dean
    - 2nd time or more: Dean Call home, 1-2 days suspension

4. **Abuse and/or Misuse Computers & Electronic Devices:**

    Computer hardware and software are for the benefit of all students. No student may purposefully tamper with either the hardware or the software so that it is inaccessible to other students. Computers are in the school for educational purposes. Abuse and or misuse of computers also include loading private software, checking personal e-mail, or accessing inappropriate web sites or web pages using school equipment. Abusing school equipment will result in suspension.

5. **Disrupt Learning:**

    Disrupting learning includes any behavior that prevents other students from learning. It may include, but is not limited to, inappropriate language, eating or drinking during class, chewing gum, and insubordination and/or selling or trading personal possessions to other students, which need to be disciplined.

6. **Abuse the Dress Code:**

    Students shall come to school in appropriate dress and in line with specific dress code and appearance limitations described in the handbook.

7. **Use Drugs and/or Alcohol and Sale or Intention to Sell Drugs and/or Alcohol:**

    Use of drugs or alcohol means to knowingly possess, consume, use, handle, give, store, conceal, offer to sell, sell, transmit, acquire, buy, represent, make, apply, or be under the influence of any narcotic drug, hallucinogenic drug, amphetamine, barbiturate, marijuana, tranquilizer, non-prescription or prescription drug (except when under the direction of a physician/parent and within school procedure), alcoholic beverage, intoxicant, solvent, gas, or any mood-altering chemical, drug of abuse or any counterfeit-controlled substance of any kind including butane lighters. This prohibition also applies to any type of drug related paraphernalia. If caught, the student will be suspended or recommended for expulsion and law enforcement officials may be contacted. The sale, distribution, possession, or use of drugs, alcohol, fake drugs, steroids, inhalants, and look alike drugs is prohibited anywhere on school grounds, at any school activity, and on any school transportation. Many drug abuse offenses are also felonies.

8. **Give A False Fire Alarm:**

    Issuing a false fire alarm is a violation of Wisconsin Revised Code Sec. 2197.32. Any student who issues a false fire alarm is subject to the legal authorities. The penalties for this, especially if any injuries result, are immense, ranging from fine of $1,000 to $10,000 and jail terms. Student will automatically be suspended.

9. **Forge:**

    Any attempt by a student to sign a teacher's, administrator's, parent's/guardian's, and or student's name to any school document will be considered forgery and is grounds for suspension or expulsion.

10. **Gamble and/or play cards:**

    Gambling includes but is not limited to on-line gaming, card playing, dice shooting, nickel-knuckle games and sports pools and involves the transfer of money or personal belongings or assistance from one person to another. Bringing, trading, and playing any cards such as Pokemon cards will result in discipline action.

11. **Bring pornographic materials:**

    Any material of this nature is not permitted at school or school functions. Students found with such materials will be suspended.

12. **Harass another Student and/or a Teacher, Administrator, or Staff Member:**

    Harassment means making unwelcome advances or any form of improper physical contact or sexual remark and any speech or action that creates a hostile, intimidating or offensive learning environment. Harassment is a violation of Federal law and is contrary to the Quest Board of Directors to provide a physically and psychologically safe environment in which to learn.

Students who harass or bully others will be reported to the police department will face suspension from school, and possibly other consequences.

13. **Disrespect and/or insubordination towards teachers or staff.**

    Disrespect (arguing, talking back, etc.), insubordination (failure to comply with directives) towards any member of the faculty or staff) and profanity (either spoken or written) will be considered a form of disrespect and the student will be disciplined by the Dean of Students.

14. **Haze Students:**

    Hazing means to plan, encourage or engage in any hazing activity. Hazing is defined as doing any act or coercing another, including the victim, to do any act of initiation into any student or other organization that causes or creates a substantial risk or causes mental or physical harm to any person. Permission, consent or assumption of the risk by an individual subjected to hazing does not lessen the prohibition contained in this policy. Hazing may carry heavy legal consequences as well as dismissal from school.

15. **Smoke or Use Other Tobacco Products and/or Bring Such Products to School:**

    This includes cigarettes, cigars, herbs, and smokeless tobacco. Possession of tobacco products in purses or lockers is prohibited under this policy and students found with these products in their possession will be suspended.

16. **Steal and/or Vandalize Private Property:**

    This means to cause or attempt to cause damage to private property or steal or attempt to steal private property either on school grounds or during a school activity, function, or event on school grounds. Students and their parents or guardians will be held responsible for any theft/vandalism that their student commits on school property. Please Note: The school will file a police report in cases of theft and vandalism. Either offense can carry heavy legal penalties.

17. **Be Habitually Tardy:**

    This means to be late for the beginning of the school day and/or late for classes.

18. **Display Threatening Behavior:**

    Threatening behavior can include verbal threats, both face to face and over electronic media (phone and/or computers) and non-verbal threats, including "hard" stares, gestures, and so on, that cause or attempt to cause any student, teacher, administrator, or staff member to feel frightened or intimidated.

19. **Being Truant:**

    Truancy means being inexcusably absent from school or a class without the knowledge of a parent. Habitual truancy by law means a student has accumulated 10 consecutive days or 15

total days of absence in one semester. There are school and legal penalties that accompany truancy.

20. **Bring Any Kind of Weapon to School:**

   A weapon includes, but is not limited to, conventional objects like guns, pellet guns, knives, smoke bombs, fireworks, or club type implements as well as mace, tear gas, or other chemicals. It may also include any toy that is presented as a real weapon. It also includes objects converted from their original use to an object used to threaten or injure another. The Administration reserves the right to all final decisions regarding the definition of what is a weapon. School personnel may search lockers, book bags, gym bags, coats, and/or any other containers at any time.

21. **Student Protest:**

   Students have the rights to share their concerns with faculty or administration through written or verbal communication, either through student council or the Parent Advisory Council (PAC). Student protests are not allowed and are illegal. If a protest is planned, authorities will be called and all students involved will be disciplined and a written letter will be placed in their permanent file. Students involved will be considered tardy and skipping class, and disrupting the regularly scheduled school day.

22. **PDA (Public Display of Affection); Sexual Assault; Sexual Harassment: Engaging in excessive displays of mutual affection (PDA) is not allowed at Quest.**
   - 1st time (depending upon severity, could go to 2nd time immediately): Warning, Teacher call home
   - 2nd time: Teacher call home; referral to Dean
   - 3rd time+: suspension and depending upon severity could lead to expulsion (see next section)

   Sexual harassment to another student, touching inappropriately in a sexual nature, or forcing or threatening someone else to do something of a sexual nature is not allowed at Quest and may also be against the law. Issues of this nature will be dealt with to the fullest extent of MPS rules and local law.

   Police will be called for these issues and students will be suspended for up-to-5 days and may be recommended for expulsion.

23. **Languages**

   While our cultural diversity at Quest is one of our most impressive and respected characteristics, it is difficult to offer quality education when multiple languages are being used in a classroom. Therefore, languages other than English should not be spoken in the classroom. Additionally, English must be spoken elsewhere in the school building when directed by a staff member including before, during and after school.

Exceptions are given to our foreign language classrooms, ESL approved situations, or whenever directed to by the instructor. Additionally, avoid colloquial language and use only standardized English at school and in the classroom. Swearing and inappropriate language is never allowed at Quest — not even in a different language. Repeated intentional offenses could result in a consequence.

Unacceptable Student Behaviors

Students are considered to be subject to the authority of the school when they are en route to or from school and at school related or school sponsored events even though those activities may not take place on school grounds. Some examples include athletic meets and games, field trips, contests, and concerts. Misbehaviors, which occur at such events as outlined below, will be subject to the same penalties as misbehaviors that occur on school grounds.

Please Note: The following three behavioral levels and the listed consequence are not absolutes. All discipline is handled in a consistent, fair, and equal manner; however, every discipline situation is unique and many are complicated by violations between several levels, past consequence history, IEP requirements and other factors. The following are only offered as a relative comparative for parents and students.

Level I -Misbehaviors

A. Possessing or using tobacco or tobacco substitutes at school
B. Failing to attend school on time or to attend classes on time
C. Failing to attend all assigned classes
D. Taking and using the writings and ideas of another and deceptively submitting them as one's own work in satisfying a school assignment
E. Signing the name of another person for purpose of defrauding school personnel
F. Cheating on examinations
G. Engaging in excessive displays of mutual affection
H. Possessing beepers, pagers, cellular telephones and similar electronic devices in school
I. Wearing non-dress code clothing
J. Posting or distributing materials on school property that causes a disruption to the educational process
K. No graffiti or writing on school property.
L. Being habitually tardy.
M. Students are not to dress down on their birthdays and notes will not be accepted on this day
N. No card playing at any time, this includes before and after school and during lunch periods 0. No Soliciting

Corrective Action: Level One

Disciplinary responses including suspensions may be used by any Quest administrator to correct Level I misbehaviors. Level I misbehaviors will result in detentions with class teacher, in-house suspensions, and optional classroom assignments. Disciplinary responses may include:

- Teacher conference (with student alone or with parent(s)/guardian(s)
- Dean of Students (with student alone or with parent(s)/guardian(s)
- Parent/guardian contact by telephone
- Detention
- Suspension up to 3 days

Related or chronic occurrence of Level I misbehaviors may result in consequence as a Level II-A misbehavior.

Level Ii -Misbehaviors

A. As defined by any Quest Administrator, chronic violation of Level I misbehaviors
B. Leaving school without permission, in the absence of an emergency declared by Quest Administration
C. Engaging in or causing a disruption on a school bus
D. Verbally or physically threatening to injure or harm another person or intimidating another person by creating fear for personal safety
E. Bringing alcoholic beverages to school or having alcoholic beverages in his/her possession, or coming to school under the influence of alcohol or drugs
F. Intentionally causing an interruption of education in the classroom
G. Using abusive or profane language (including name calling/racial slurs)
H. Failing to adhere to school culture and directives of school personnel when subject to the authority of the school
I. Intentionally participating in or initiating actions that result in the disruption of the entire school
J. Fighting, hitting, or pushing another student
K. Gambling on school premises
L. Trespassing, including entering a school to which the student is not assigned without signing in at the office, entering a school from which the student is suspended without permission from Quest administration or bringing an unauthorized visitor to the school
M. Intentionally participating in hazing activities
N. Sexual conduct or sexual contact with or without mutual consent, which includes all forms of sexual harassment
O. Engaging in an activity that may create a condition that is unsafe or unhealthy to others
P. No students are permitted on the elevator for any reasons. This will be strictly enforced with three-day suspension to ensure accordance.
Q. All students who drive to school must be registered in the main office. Any unregistered driver will be towed at owner's expense and banned from parking in the lot for the remainder of the school year. All registered drivers must strictly adhere to parking policy to ensure the safety of all Quest students.
R. Quest is not an open campus facility. No student will be permitted to leave building for any reason after arrival unless properly signed out in office for the day by a parent or guardian. Only a Quest administrator can give permission for a student to leave the building.
S. Student use of copy machine is strictly prohibited.

T. Students are not permitted in unsupervised areas within the school.
U. Bringing inappropriate or unacceptable materials to the school such as pornographic items, CDs, video games, movies, religious distributions, etc.

Corrective Action: Level Two

The Dean of Students or any other Quest Administrator may suspend a student for any period not to exceed five (5) school days. Three Level ll misbehaviors with suspension will result in a behavior contract. Violation of a Level II misbehavior while on a contract may result in expulsion. Students on a behavior contract may be expelled on their next offense (excludes tardies and dress code violations). It will be at the discretion of the Quest Administration to issue behavioral contract at any time as seems necessary.

Level III - Misbehaviors

A. Using or bringing weapons, dangerous instruments, explosives, firearms, or knives to school
  • A weapon is anything that is commonly used or designed to hurt someone or to someone in fear (examples: guns, knives, knuckles, clubs, box-cutters etc.)
  • A dangerous instrument is anything that although not specifically designed to hurt someone, can be used to hurt someone or put someone in fear (examples: belts, combs, compasses, etc.)
  • An explosive is any substance that can potentially generate a release of mechanical or chemical energy (examples: firecrackers, cherry bombs, gun shells, etc.)
  • Any object, which closely resembles a weapon or explosive and could cause fear for their safety is included in this category (examples: starter pistols, pellet guns, toy guns, smoke bombs, etc.)
B. Verbally or physically threatening to injure or harm a school staff member
C. Showing disrespect to teachers or staff and/or using inappropriate language and behavior
D. Intentionally causing physical injury to a school staff member
E. Sexually assaulting another person
F. Intentionally causing or attempting to cause physical injury or intentionally behaving in such way as could reasonably cause physical harm to another person
G. Hate crimes
H. Being truant
I. Engaging in drug related activities, including but not limited to:
  • Making, selling, or distributing drugs/counterfeit drugs at school;
  • Bringing readily identifiable drug abuse instruments or paraphernalia to school or
  • Having such items in his/her possession;
  • Using or possessing drugs/counterfeit drugs at school.
J. Intentionally burning or attempting to burn property
K. Stealing or attempting to steal or possession of stolen property
L. Damaging or attempting to damage property: Any property damaged/broken by the student whether playfully or intentionally is to be repaired / replaced at the parents' or guardians' expense.

M. Forcibly entering a school building locker, classroom, or secured enclosure
N. Extorting or attempting to extort property
O. Falsely sounding a fire alarm, or causing a fire alarm to be sounded
P. R. Falsely communicating or causing to be communicated that a bomb is located in or on property
Q. S. More than one person acting together to intentionally cause harm or injury to another Individual U. Excessive referrals of Level II misbehaviors may/will result in expulsion.

CORRECTIVE ACTION: Level Three

For all Level III misbehaviors, Quest administration may recommend the student to the Board of Directors for expulsion. The recommendation to expel any student will be made in writing and will include the reasons for the expulsion by the school administration. Parents will be informed of any Level III misbehavior offense committed by their child immediately by the administration of the school.

Explanation Of Consequences

Written Consequence

A written consequence usually includes the complete hand written copying of an essay on respect, classroom discipline, or another topic reflecting the inappropriate behavior. Written consequences can also include writing a report on an assigned topic, a detailed explanation of the situation, a behavioral modification plan/contract, and/or an apology letter. The written consequences are usually due within one day and must be signed by the student and their parent.

Detention

Classroom Detention:

Classroom detention is assigned by the teachers and is conducted in the teacher's classroom. Detentions start within 3 minutes of the assigned time and last usually the minimum of one class period. If a student does not show up for a classroom detention, the teacher may add an additional consequence. Two detentions with a classroom teacher may be cause for referral to the Dean of Students and potentially a parent conference, loss of student privileges, or suspension.

School Detention:

A school detention is assigned by the Dean of Students and is conducted in or near the Dean's office. Detentions start within 3 minutes of the assigned time and last usually the minimum of one class period. If a student does not show up for a school detention, the Dean may add an additional consequence. Two school detentions may be cause for a parent conference, loss of student privileges, or suspension. A written notification of school detention is sent home with the student and must be returned to the Dean of Students signed by student's legal guardian within two days or additional consequences may be assigned.

School Detention Rules

    f)   All the rules in the Quest Student Handbook apply during a school detention.

g) The supervising teacher can and will remove a student from detention at any time for any reason. Removal from detention will result in a suspension the following day.

h) Students that arrive late to detention will not be admitted to detention and will receive a suspension the following day.

i) During detention, there is to be no talking, passing notes, writing on furnishings, use or display of any electronic devices (including cell phones), gum chewing, eating food, or drinking of any beverage.

j) Students must remain seated in the designated desk chair; there is no sitting, standing, or lying on the desks or floor.

k) Computers are not available during detention.

l) Detention time must be used to complete all make-up, missing, or current homework.

Suspension

The Dean of Students will give notice of suspension and the reasons for the consequence to the student in writing after hearing the issues involved in a situation. This letter is addressed to the parents and must be returned to the Dean of Students signed by the authorized parent or guardian within 7 days of the offense. If you are suspended, you will have the opportunity to make up work that you missed during the suspension.

You and your parent/guardian may appeal a suspension within one (1) school day of the suspension being issued. This appeal will be made to the principal and heard by a disciplinary board made up of three (3) administrators. You may not attend classes until the appeal is heard, but you will be able to turn in work for the classes you miss while waiting for the appeal and receive credit for that work. All disciplinary board hearings will be held within two (2) school days of the appeal being made.

A written notification of suspension is sent home with the student and must be returned to the Dean of Students signed by student's legal guardian upon return or additional consequences may be assigned. Most often, a parent conference with the principal is required before the student can return to school.

Due Process

All students at Quest are entitled to the rights guaranteed by the United States Constitution and Bill of Rights, and their rights will not knowingly be denied by the required code of conduct or by any disciplinary actions taken by the school. Any student who exhibits any of the Unacceptable Student Behaviors listed in this handbook or added to this list at a later date will suffer immediate consequences. These consequences range from notification of parents, detention, and emergency removal from a school activity to suspension, expulsion, and criminal prosecution.

All students at Quest have the right to feel that they are physically, emotionally, and intellectually safe.

• Therefore, if at any time you feel you are the subject of harassment, hazing, threats, or other intimidating behavior, you should immediately speak to an administrator about the problem. The situation will be investigated as soon as possible. All reports like this will be kept completely confidential.

- Similarly, if you are concerned about the safety of another student who seems to be the subject of harassment, hazing, or threats, you should immediately speak to an administrator about the problem. The situation will be investigated as soon as possible. All reports like this will be kept completely confidential.

Print student's LAST name: _____   FIRST Name: _____ Grade: _____

Quest Student Conduct Contract

Because all of you have elected to enroll Quest, we expect you not only respect their rights as members of our school community, but also your responsibilities to other members of that community. We ask each of you to carefully read over and sign the student contract on this page. As the school year unfolds, do your best to behave in ways that will enhance your own and others' ability to learn.

As a student of Quest, I will do my best to do the following:

- I will show consideration for the rights and feelings of others, being careful not to hurt them physically or make them feel bad.
- I will speak to others respectfully, not using profanity or uncomplimentary names.
- I will show respect for all people working or helping in the school.
- I will show careful regard for both my property and the property of others.
- I will always ask permission before I borrow other people's things, and I will return them promptly and in good condition when I am finished.
- I will attend school regularly; I will be in class on time with all necessary materials; I will not be tardy.
- I will make good use of class time and complete and turn in assignments on time.
- I understand that I must make up assignments I missed because of an absence.
- I will not share a locker and will use only a Quest-approved lock on my locker.
- I will remain on campus during school time, including the lunch period. I will not leave the school grounds without the permission of the administration.
- I will do my best on my schoolwork, and I will let others do their best.
- I will ask for help if I do not understand.
- I will follow the dress code and arrive at school in my uniform.
- I will not bring any contraband items to school.
- I will help keep the school building and grounds clean and tidy.
- I will walk in the halls.
- I will not participate in any behavior banned by the school.
- I will respect the businesses around the school, treat their establishments and their employees with respect, and not violate their policies or rules.

Student Signature: _____   Date: _____

Parent/Guardian as Witness: _____   Date: _____

Print student's LAST name: _____   FIRST Name: _____ Grade: _____

Quest Photo Permission Form

I understand that throughout the year, Quest students participate in activities, events or projects in which students may be photographed or videotaped. This includes but is not limited to school portraits, graduation power point presentations, student projects, field trips, or special events.

I give my permission for my child's photo and/or artwork to be used in materials published by Quest's Web site or submitted for distribution by media outlets. I understand that only my child's name and school of attendance may be used, and no other personally identifiable information about my child will be given. I also understand that I may revoke this permission, in writing, at any time.

Parent/Guardian Signature: _____   Date:_____

Please print Parent/Guardian name: _____Home telephone: _____

Student's Signature: _____ Date: _____

Print student's LAST name: _____   FIRST Name: _____ Grade: _____

Quest Acceptable Use Policy For Computer

And Internet Usage

The computer network and Internet are tools afforded to all students of Quest connecting thousands of computer networks all over the world with millions of individual subscribers. The use of the Internet puts current information at the user's fingertips. The Internet provides access to electronic mail, college and university libraries, museums, and a chance to exchange information with people throughout the world.

The intent of this policy is to insure that the computers and Internet are used properly for educational purposes, to facilitate diversity and personal growth in technology, to learn information-gathering skills. There are generally accepted rules of etiquette when using the Internet. The computers and their services at Quest are provided for the responsible use of the students. Student user privileges may be curtailed or revoked at any time at the discretion of the administration and teachers. Guidelines for acceptable use include but are not limited to the following and should not contradict to the student handbook:

- Each student will be assigned a username and password, which are confidential and should not be shared. Accepting Quest Internet and Computer Acceptable Use Policy will activate student permissions.
- Your user ID and password are keys to accessing computers and the Internet. In the wrong hands, your password and User ID can be used to impersonate you on line and take unauthorized action in your name. Accordingly, except for authorized school system employees, it is against Quest policy for anyone to disclose and User ID or password, including their own, or to have, use, or attempt to use any other person's User ID or password under any circumstances. If you believe that anyone has learned your User ID or Password, you should inform your teacher.
- Students are responsible for the assigned computer. User will notify the teacher or lab supervisor for any problem that the assigned computer has.
- Quest and teachers cannot be held accountable for any damages suffered including loss of data resulting from delays, non-deliveries, service interruptions, or inaccurate information. It is students' responsibility to keep their files and work safe.
- Users will not intentionally seek information on, obtain copies of, or modify files, other data, or passwords belonging to other users. A student will not represent him or herself as another user.
- The student will adhere to the laws, policies, and rules governing computers including, but not limited to, copyright laws, rights of software publishers, license agreements, and a student's right of privacy created by federal and state law.
- The student has the responsibility to respect the integrity of computing systems. For example, users will not develop or use programs that harass other users or infiltrate a computer or

computing system. A student will not damage or alter any software, any computer or any computing system on or through the Internet.

- It is the student's responsibility to keep computer viruses off any school equipment. The student will be held accountable for any attempt to install and/or run a computer virus.

- The student exercising his/her right to use the Internet, as an educational resource will also accept the responsibility for monitoring all materials received under his/her user name

- All communication and/or information made or obtained using school computer network has no privacy. Students have no right of privacy with their folders or documents. Quest reserves the right to view all student work, examine their e-mails, monitor and log any computer activity and take appropriate action if necessary.

- The student will accept the responsibility for not accessing, processing or storing pornographic material, inappropriate text files, or files dangerous to the integrity of the network.

- It is the student's responsibility to maintain the integrity of the electronic mail system. The student is responsible for all mail received under his/her user name. The student has the responsibility to make only those contacts leading to educational growth through the Internet. The student is responsible for monitoring all e-mail received for pornographic material, inappropriate information, or files that are potentially dangerous to the integrity of the school's computer network system. The student who receives objectionable material will report it immediately to the lab supervisor.

- Students will use computer and Internet by the permission of the teacher/lab supervisor related with the lesson. Game playing either on the local computer or on-line, viewing or participating in any 'Chat Room' activity, conducting any kind of personal business transactions, cannot interfere with student learning.

- It is the student's responsibility to report immediately any misuse of the network to the lab supervisor. Misuse can come in many forms. It is commonly viewed as any message sent or received that indicates or suggests pornography, unethical or illegal solicitation, racism, sexism, or inappropriate language.

- All illegal activity is prohibited, and Quest will cooperate fully with any law enforcement officials and/or agencies investigating and/or prosecuting such activities.

Quest reserves the right to establish additional rules and take appropriate actions to implement this policy.

I have read the "Acceptable Use Policy" and understand that computer and/or Internet privileges may be suspended or revoked. I agree to abide by all of the rules and regulations of the "Acceptable Use Policy" and understand that I may be asked to prove that I have been granted computer and/or Internet privileges. A signature on the Agreement Form located in the parent/Student Handbook is considered as agreement to this document.

INAPPROPRIATE COMPUTER / INTERNET USE:

- The following actions are forbidden and will result in sanctions if they occur:
    a) Sending, receiving or printing offensive messages or images.

b) Using obscene, insulting or threatening language when corresponding with another user.
c) Consciously damaging computers, computer systems or computer networks, either through physical abuse or the use of software.
d) Violating copyright laws.
e) Using the password or identity of another.
f) Unauthorized reading or reviewing the files of another user.

Student

I have read the above policy and agree to abide by the provisions. I understand that violation of the policy may result in suspension or revocation of system access.

Student's Signature: _____   Date: _____

Parent: _____   Date: _____

I have read the above policy regarding my child's computer usage at Quest. I agree and accept responsibility for my child's adherence to the aforesaid rules and for my child's access to networks on the Internet and usage of the computer equipment.

I hereby release Quest, its Administration, operators, and any institutions with which they are affiliated from any and all claims and damages of nature arising from my child's use of, or inability to use, the system, including without limitation, the type of damage identified in the School's policy and administrative regulations.

Parent/Guardian's Name (Print):   Date: Parent/Guardian's Signature:

Print student's LAST name

FIRST Name: _____   Grade: _____

Print student's LAST name: _____   FIRST Name: _____   Grade: _____

Student Responsibility

I have been informed by the administrative/teaching staff at Quest about the School Board Discipline Policy for Middle School and High School students and the Quest Code of Conduct. I understand that:

1. A student possessing a gun or other dangerous weapon will be suspended. The police will be called, and the student will be responsible for expulsion from Quest-Milwaukee Schools.
2. Pagers, cellular telephones, and laser pointers are prohibited in schools.
3. A student possessing, using or attempting to sell/distribute any drugs or alcohol will also be suspended, the police may be called, and the student may be recommended for removal from school. Expulsion may also be recommended.
4. A student possessing, using, or attempting to sell/distribute any chemical irritants (pepper spray) in school or while going to and from school, will be suspended. The police may be called, and the student may be recommended for removal from school. Expulsion may also be recommended.
5. A student involved in other criminal offenses such as possession of knives and other weapons, serious gang activity, battery, assault, extortion, or robbery, will lose his/her school assignment. Expulsion may also be recommended.

Student Signature: _____   Date: _____

Room # Grade: _____

Quest Financial Policies and Procedures Manual

Introduction

Internal Control System

Internal controls are a mandatory part in any organization's operating system. They must be designed to protect the employees and the organization. The concept of internal control affects all of the assets of an organization, its liabilities, its revenue and expenses, and every aspect of operations. The purpose of internal controls is to ensure that the entire organization operates in accordance with management's plans and policies. A sound system of internal controls provides assurance to management that business decisions being made are based on dependable financial information.

The system of internal controls includes all measures taken by an organization for the purpose of:
- Protecting its resources against waste, fraud, and inefficiency,
- Ensuring accuracy and reliability in accounting and operating data,
- Securing compliance with established policies, and
- Evaluating the level of performance in all divisions of the organization

Internal controls fall into two basic categories: administrative controls and accounting controls. Administrative controls are measures that increase operational efficiency and compliance with policies in all parts of an organization. Accounting controls are measures which increase the reliability of the financial statements and the supporting accounting records. The guidelines in this manual deal primarily with the accounting controls of **Quest Milwaukee.**

Accounting Controls

Ideally, accounting controls maintain a plan under which employees' duties are arranged, and records and procedures are designed to make it possible to apply valid accounting control over assets, liabilities, revenues, and expenditures. Maintaining strong internal control also provides additional assurance to the independent auditors of the reliability of the accounting records. In order to form their opinion, they must evaluate any weaknesses in the accounting system and the effect this may have on the dependability of the financial statements and supporting records.

The optimum internal accounting control process consists of:
- division of responsibility among different employees for a sequence of related functions;
- clear establishment of each employees' responsibilities and duties;
- separation of the responsibility for operation, acquisition, and custody of assets; and
- Use of proofs, checks, and other security measures.

The subdivision of duties within an organization should be designed so that no person handles a transaction completely from beginning to end. When duties are divided in this manner, the work of one employee serves to verify that of another and any errors which occur tend to be detected promptly. If one employee is permitted to handle all aspects of a transaction, the danger of error or fraud is increased. To the extent practicable, rotation of employees from one job assignment to another may strengthen internal control. Although it may be proper to assume that all employees are honest, it is nevertheless essential to avoid any weakness or gap in accounting controls. These guidelines will establish internal controls that will help prevent illegal or unauthorized transactions or acts; provide proper accounting data and information with a minimum of human error; and

protect the staff of Quest from unwarranted allegations, by fixing responsibility and by removing sources for potential employee abuse.

Adequate internal control includes the involvement of management in the accounting process and through measures such as:

- Management level staff review and approval of bank reconciliations and monthly financial reports;
- Management level staff verification of invoices prior to payment;
- The use of serial numbers on checks to ensure that no document is misplaced and forgotten;
- The creation of documentary evidence to verify an expense before it is paid;

Purpose of Accounting Policies and Procedures Manual

Written accounting procedures provide guidelines that clearly define the process and assign responsibility for each accounting function in the organization. There are four basic values that are expected from an accounting manual.

- Documenting procedures which will standardize the methods used so that the correct and most efficient procedures are consistently used.
- Documenting procedures which will be helpful in training accounting and other personnel, including current and new staff.
- Documenting procedures which will be useful to non-accounting personnel as a reference guide.
- Documenting procedures which will be a tool for management control of operations in that the procedures used can be specifically prescribed, changes approved and unauthorized deviations detected.

Accounting Department Overview

Organization

Staff, consultants and Board members involved in process

The organization's individuals who play or may play a role in the accounting process are as follows:

Administrative Assistant (AA) (assigned staff) – A staff member or consultant will be assigned this function, either as a position or as part of his/her overall responsibilities within his/her position. This person receives funds and bills at the office and reports directly to the School Director (if located at a school) or the Executive Director (if located at the Center of Support). The AA does not have access to the accounting software.

Executive Director (ED). The Executive Director is responsible for ensuring adequate preparation and reporting of the all school and program budgets. He or she is also responsible for adhering to sound fiscal operations in regards to monthly budget and cash flow monitoring. The ED or his/her delegate also provides the required approvals and data for transaction classification to the Administrative Assistant and the Director of Finance for day-to-day transactions. The ED reports directly to the Chair of the Board of Directors.

The ED is also responsible for ensuring that the chartering organization receives all

required fiscal and monitoring information, stipulated in each charter contract, by the required date. This information may include, but is not limited to:

- Proof of line of credit,
- Certified Student List,
- List of certified teachers,
- Proof of an executed lease,
- Proof of liability insurance,
- End of Month Cash Balance Report, &
- Quarterly Report of Income and Expenses, with Budget Comparison.

School Directors. School Directors are responsible for preparing their school and program budgets and monthly monitoring budget adherence. They also play an important role in authorizing transactions to be charged to their schools/programs. School Directors report directly to the Ed. School Directors also provides the required approvals and data for transaction classification to the Administrative Assistant and the Director of Finance for day-to-day transactions for their schools and programs.

Director of Finance (Chief Financial Officer). This staff member performs the tasks or assigns staff to provide general oversight and delegation of duties in the accounting processes. He or she is responsible for the preparation of all school and program budgets and is also responsible for reporting all budgets and cash flows to the Board. The Director of Finance works closely with the ED and reports directly to the Board of Directors.

Director of Human Capital (DHC) (assigned staff). A staff member or consultant will be assigned this function, either as a position or as part of his/her overall responsibilities within his/her position. This person will gather personnel information necessary for the personnel records and initiate any changes (including new hires or separations) that will affect the payroll process. The DHC will also interface with the benefit providers. The DHC reports directly to the Executive Director.

Chair of the Board of Directors. The Chair of the organization also provides authorization per Table 1.

Treasurer. The Treasurer provides authorizations, as indicated in this manual and guidance as appropriate. The Treasurer chairs the audit committee.

Finance Committee (FC). This committee reviews and recommends Board action on the annual budget. This committee also reviews and recommends Board action on the Accounting Policies and Procedures manual. This is an ad-hoc committee created by the Board. This committee meets monthly to review the financial statements of the organization and if necessary will make a special report to the Board. This Board also appoints the Audit Committee.

Audit Committee (AC). This committee selects and hires auditors, reviews the audit, implements whistleblower policies and implements conflict of interest policies.
The major accounting activities require the management of the following documents and processes:

- General Ledger
- Budget
- Cash and Investment Management
- Asset Management
- Purchasing & Contract Management
- Accounts Receivable
- Cash Receipts/Collections
- Accounts Payable
- Payroll and Benefits
- Financial Statement Processing
- External Reporting of Financial Information
- Internal/Management Financial Information
- Bank Reconciliation
- Audit
- Insurance

Real-Time Accounting –

An accounting system can be best utilized at real-time; all transactions are entered in the system as they occur allowing for balances to be available at any time needed although prior to the end-of-the-month adjustments. To achieve real-time accounting the organization has to adopt a mind-set that any financial transaction will be recorded in the QuickBooks accounting system immediately. Given the inherent limitations of operating an organization in a virtual setting, Quest will not achieve real-time accounting in its true sense but rather experience a 30-day delay with most of its transactions. The 30-day delay is attributed to the maximum amount of time each employee has to submit their request for reimbursement.

To help achieve a situation close to real-time accounting, the organization can use the following tools and processes:

- Use of pre-printed QuickBooks checks – as soon as the check is written it is automatically recorded in the system.
- Reconciliation of bank accounts as soon as the bank statement arrives, or sooner since the organization has online access to their bank accounts. This tool allows management to have an up-to-date balance of their bank accounts and avoid overdrafts.
- Entering bills as they are authorized and coded – the expense and debt is recorded within 30 days of being incurred and the budget line item is updated to allow the user to have an up-to-date budget balance.
- Entering payroll as soon as the payroll is processed – allowing for bank balances to be updated immediately. In addition to payroll checks, the organization must enter other fees, withholding liabilities and payroll tax expenses.
- Recording credit card income processed within two weeks. This tool helps maintain an accurate bank balance at all times.
- Use of QuickBooks memorized transactions to record recurrent bills, payroll entry, and payments due. This tool facilitates data entry when the format and/or amounts remain the same each month.
- Update each year to the most current version of QuickBooks

3. Document Organization

Financial documents must be safeguarded and well-organized at all times. They may contain sensitive personal information (such as personnel records) or sensitive information about the organization (budget).

The easiest way to organize the records of Quest is alphabetically:

- Use one folder per vendor per year.
- Use one folder per month for each main bank account and one folder per year for each secondary (less used) bank account. All bank statements and bank reconciliations must be filed in these folders.
- Each folder should have metal clasps to secure the documents generated. All documents must be secured inside the folder.
- Use bright colored folders (of a color to be used exclusively for financial information) to help identify financial information that must be kept in a secure location.
- Use an expandable folder for all cancelled checks.
- These documents should be maintained in a locked file cabinet at the Center of Support when not in use and overnight.

Responsibilities

Computer Access

Financial information is processed in **QuickBooks Fund Accounting** software. The software is installed in the Director of Finance's computer. Access into this computer is password-protected and the QuickBooks software is also password-protected. The QuickBooks data is backed up each night.

The Director of Finance is responsible for the maintenance of the software. The Director of Finance is responsible for the security of the software and for authorizations to access the organization's data. Authorization for the use of QuickBooks is given as follows:

Administrator level– the Director of Finance is the only user who will be have this level of access, which allows any change or posting of any transaction deemed necessary. The Administrator can close an accounting period, allow changes to periods previously closed and manage users and restrict their access depending on their function within the accounting process. The Administrator uses a unique user name and password. This unique password is also given to the Chair.

Daily processing – the Director of Finance or staff designated by the Director of Finance will have access to all areas in QuickBooks except setting up passwords, changing transactions prior to the period closed and other sensitive areas as determined by the Director of Finance.

Specific Processing – Other staff may be granted access, including the Executive Director to specific areas of QuickBooks while limiting or denying access to areas in which they do not need to work or to view information. This will be done on a case-by-case basis. The user name and password used by this user will be maintained in QuickBooks by the Director of Finance.

System Closing Date – QuickBooks allows for periods that have been reconciled and otherwise examined for accuracy to be closed. This control ensures that information previously used for

reporting purposes cannot be changed with future transactions. The QuickBooks Administrator (Director of Finance) is the only user authorized to change the closing date or to edit transactions posted during a period that has been closed. Quest's policy is to close each accounting month following the bank reconciliation and monthly closing adjustments.

A list of all passwords should be maintained in the safe and with the Chair.

Physical Security of Accounting Records and Files

The accounting process generates paper and electronic records that must be maintained in a secure location with limited access. The following paper records must be locked in a file cabinet at the Quest**'s** Center of Support with access limited to the Director of Finance, the Executive Director or his/her designee:

- Payroll records
- Personnel records
- Bank statements
- Blank checks
- Cancelled checks
- Undeposited funds (cash or checks).

Electronic data is maintained in as secured computer. Electronic data in any way related to the financial processes of Quest maintained by any staff or Board member involved in the financial cycle should be secured by a password.

All electronic data should be backed up at least once per day. The Director of Finance is responsible for making a backup copy of the data in the Director of Finance's computer(s). (QuickBooks data and other files generated by the Director of Finance) to be **stored off-site** at least once per week. The backup can be performed on a backup tape, writable disk, or on a flash (UBS) drive. This allows for recovery of the most important financial data if an event destroys or damages the office's physical location.

Delegation of Authority

The Board of Directors governs through the application of the By-laws of the organization. These By-laws allow the Board to authorize management (Center of Support personnel and school leadership) to engage in certain activities. For internal control purposes, it is important to separate the duties of the accounting functions as much as possible. The attached matrix summarizes the assigned responsibilities.

Responsibility Assignment Chart

Authority delegated in this document is understood to be within the limits of the Board approved budget and organization structure.

Activities	Staff	Director of Finance	School Directors	Executive Director	Board Chair	Board
Annual Budget (By School)		Rv	P	Rv, Rc, P		A
Insurance Coverage	P, Rc		Rv, Rc			A

Selection of Auditor		Rc				A
Review of Annual Audit		Rv, Rc		Rv		Accept
Checks Up to $14,999		P		Rv, A		
Checks, written to the Executive Director for any amount		P		Rv, Rc	A	
Grants, Sub-Grant , Contracts and consulting agreements up to $4,999 and within the approved budget			Rv, A	Rv, A		
Grants, Sub-Grants, Contracts, and Consulting Agreements up to $14,999 and within the approved budget.		Rv	P, Rc	P, A		
Grants, Sub-Grants Contracts, and Consulting Agreements $15,000 and over		Rv	P, Rc	P, Rv, Rc		A
Open Bank Accounts		Rv		Rc	A	
Leases up to $4,999 [Executive Director reviews and approves if not program-related]		Rv	Rc	A	A	
Leases $5,000 & over		Rv	Rc	Rc		A
Process Revenue & deposits	P	Rv	P	Rv		
Deposits to bank				Rv		
Payroll Changes (not involving the Executive Director's position)	P	Rv		A		
Payroll changes to the Executive Director's position					Rc	A
Internal Reporting of Financial Information		P	Rv	Rv		Accept
Bank Reconciliations		P		Rv, A		

Table 1. Division of Duties.

P = PREPARE   Rc = RECOMMEND   Rv= REVIEW   A = APPROVE/SIGN

* Any check $15,000 and over can be signed by the Executive Director with written approval from the Treasurer or Chair prior to signing. Such written approval must be maintained with the backup documentation attached to the check stub.

Professional Development

The overall organizational needs for professional development (PD) are addressed in the Business Plan and in the Human Resources Policy and Procedure. As it pertains to the financial aspects of Quest, the Executive Director will ensure that all personnel who interact and perform duties under this policy will receive on-going professional development to ensure that each employee is capable of carrying out their duties.

The baseline Finance PD will include: The Division of Duties, the Chart of Accounts, Initiating and Closing-out Purchase Orders, Credit Card Purchases, Check Requests, Record Retention and the Whistle Blower Policy.

General Ledger and Chart of Accounts

The general ledger is defined as a group of accounts that supports the information shown in the major financial statements. The general ledger is supported by various subsidiary ledgers that provide details for balances in the accounts. The general ledger is the foundation for the accumulation of data and reports.

Chart of Accounts Overview [6 digit numerical]

The chart of accounts contains a systematic numbering system for the accounting system. Accounts are means by which differing effects or transactions can be categorized or collected.

The chart of accounts is the basis for the general ledger, and therefore the basis for Quest's accounting system. General ledger accounts are used to keep track of transactions and how these transactions affect each asset, liability, revenue, expense and net asset account.

There are two types of accounts: real accounts and nominal accounts. Real accounts are asset, liability, and net asset accounts and they appear on the statement of financial position (balance sheet). Nominal or temporary accounts are revenue and expense accounts, and they appear on the statement of activities (profit and loss). Quest's nominal accounts are periodically closed or zeroed out, but real accounts are more permanent.

Control of Chart of Accounts

Quest's chart of accounts is ultimately controlled by the Director of Finance. The Director of Finance's responsibility includes handling the account maintenance such as additions and deletions. The Director of Finance makes sure the chart of accounts meets the organizational structure and the needs of each granting source.

Accounts should be maintained to a minimum to facilitate generating concise financial reports easy to read and understand.

Schools, Center of Support and Programs [2 digit numerical]

Where Quest has more than one function, each function shares the same chart of accounts but is separated in QuickBooks by a different "program" code. QuickBooks can generate a full set of financial statements, including balance sheet and statement of activities for each program. Schools are the primary programs established as part of this finance system. The classification of programs is used to track the "profitability" of different functions within Quest and to track the program's position with respect to its assets (including cash in bank) liabilities and net assets (or equity).

Programs also facilitate the preparation of the Statement of Functional Expenses, as required by the annual financial statement audit. New programs are added as new functions are developed within **Quest** or when a current program splits into two or more separate operations. The Director of Finance, in consultation with the Executive Director, is responsible

for adding, deleting and otherwise maintaining an appropriate number of programs. Programs should also be kept at a minimum. It is the responsibility of the Director of Finance to inactivate unused accounts and programs.

Funders [4 digit numerical]

Quest's accounting system should also accumulate information on funding resources, use of those resources and balance of funders cash maintained. We separate this information in QuickBooks by a different "funder" code. As with programs, QuickBooks can generate a full set of financial statements, including balance sheet and statement of activities for each funder.

One group of account numbers will be assigned to on-line funders who donate to Quest through PayPal. All donations that are less than $1,000 will be aggregated into a common account. These donations will be tracked via spreadsheet for acknowledgment purposes. Donations greater than $1,000 will be assigned to a unique Funder number and also tracked for acknowledgment purposes.

Department [3 digit numerical]

Each revenue and expense transaction can be classified further to a department within each program. Departments are used to keep track of revenues and expenses only and can be considered a sub-program category. QuickBooks cannot track assets, liabilities and equity under departments.
The following list of accounts and classes form the basis of the accounting system for Quest:

CHART OF ACCOUNTS		
Account Range	**Category**	**Definition**
100000 to 119999	Cash	Cash includes bank accounts, petty cash and investments
120000 to 149999	Current Assets	Current assets are those assets (other than cash) which are available or can be made readily available to meet the cost of operations or to pay current liabilities. The most common current asset other than cash is receivables, prepaid expenses and advances.
150000 to 199999	Fixed Assets	Fixed assets are tangible assets with a useful life of more than one year that are acquired for use in the operation of the entity and are not held for resale This category includes accumulated depreciation as a contra-account to fixed assets.
200000 to 219999	Accounts Payable	Accounts Payable include vendor bills accrued but unpaid and credit card bills.
220000 to 259999	Current Liabilities	Current Liabilities include liabilities that are due or expected to be paid within one year.

260000 to 299999	Long Term Liabilities	Long Term Liabilities are liabilities that are due or expected to be paid in more than one year
300000 to 399999	Net Assets	restricted funds.
400000 to 499999	Program Revenues	Cash inflows, other asset enhancements or the settlement of liabilities (or a combination) during a period from delivering or performing services that constitute an entity's operations.
500000 to 599999	Grants & Contributions	All donated funds, restricted or unrestricted
600000 to 999999	Expenses	Cash outflows or obligations incurred that are spent on overhead or a particular function
Expenses are grouped according to their natural order as follows:		
	600000	Salary expenses
	610000	Payroll Expenses
	620000	Professional fees
	630000	Travel Expenses
	640000	Occupancy expenses
	650000	Office expenses
	660000	Equipment & Software
	680000	Program expenses
	690000	Administrative Expenses
	700000	Other & miscellaneous expenses
	800000	Facilities Expenses

Programs and Departments (as of the date of this manual):

10 – Center of Support
20 – Resource Development (Fundraising)
30 – Communications
40 - Schools (Quest School #1 = 041)
60 - Local Funders
70 - National Funders

Vendor and Customer Ledgers

Transactions will be assigned by vendor name (for accounts payables and checks) and customer name (for invoices and funds received). The vendor and customer names will be maintained alphabetically by name (using last name first if individuals).

Vendor Examples: Teachers for reimbursements, providers for services, etc.
Customer Examples: Parents for fees, uniforms, etc.

Details on Transactions

All transactions will contain, in the memo section, sufficient detail to enable a third party to understand the source of the transaction before looking at the invoice.

Annual Budgeting

Overview

Budgeting is an integral part of any organization because it essentially translates the organizational goals and objectives into financial and human resource terms. A budget should be designed and prepared to direct the most efficient and prudent use of the organization's financial and human resources. A budget is a management commitment of a plan for present and future organizational activities that will ensure the organization's survival. It provides an opportunity to examine the composition and viability of the organization's programs and activities simultaneously in light of the available resources and as they relate to its longer term strategic plan. The main budget of the organization presents revenues and expenses for the operation of the fiscal year.

The organization can also create a capital budget which is a plan for setting targets for financial stability such as the establishment of a cash reserve, a line of credit and the purchase of major assets and other major expenditures.

Policy

Budgets for Quest are set annually. Each School Director is responsible for preparing the annual budget for his/her school and each program within their school and for presenting/explaining the budget to the Executive Director/and the Director of Finance. The Director of Finances will have the responsibility of preparing the Center of Support budget for presentation to the Executive Director. The Finance Committee will review and recommend to the Board approval of the budget. Budget variances will be explained along with any recommendations for corrective action as required. Changes and revisions to the budget during the year are made and approved by the Board.

Procedure

Timing of the Budget Process

The budget of **Quest** should be discussed and approved, at least in draft format, two months before the beginning of the fiscal year. **Quest's** fiscal year begins January 1st. The following timeline should be observed for the budget process:

January – Executive Director and School Directors prepares his/her budget for the next fiscal year.
February – First draft submitted to Director of Finances and Executive Director (for school budgets)
March – First draft of consolidated budget to Finance Committee
April – Board meeting to approve budget

Steps of the Budget Process

The budget must integrate the organizations past activities with the future year's goals and objectives that have been discussed and approved during the meetings of the Board throughout the year. For that reason it must be prepared in close relation to historical information. It is also essential that the budget be prepared, discussed and approved using the same chart of accounts programs and departments as currently in use in the QuickBooks accounting system. This facilitates the comparison of year-to-date versus budgeted amounts throughout the year.

Each School Director will begin with a set of financial statements (in Excel format) taken from QuickBooks with actual expenses for the period July through March. The current year budget will also be displayed in the spreadsheet. Suggested month – [March]

Using the information above, add a column in the Excel spreadsheet to project the expenses for the remainder of the fiscal year (July through March). The sum of the expenses January through September and the April through June projection will provide the Executive Director with a projection of how the program will end the current fiscal year. Suggested month – [March]

Each School Director and/or the Executive Director will project funding sources for next year's activities. Funding sources should be included in the budget if there are:

- Funds received,
- A written commitment such as a grant or a letter of approval,
- A verbal commitment from the funder indicating that the funds are committed and that a written commitment is forthcoming, or
- Program income is estimated based on past performance.

Based on the plans and goals that the Executive Director and the Board have set for the network, and using the projected expenses for the current year, each School Director will create a budget that will meets the goals (in whole or in part) and stay within the projected funding sources.

Each school budget must include a Facilities line item based on the rate provided by the Director of Finance to each School Director and the Executive Director. The Facilities cost is the schools share of the overall costs for all school facility related expenses (energy, rent, building insurance, and custodial expense).

The organization's overhead (or administrative) expenses are included in the network tax and this amount is taken off the top. It is calculated as a percentage of all shared direct expenses. The Director of Finance will provide the preliminary tax rate to each school. The Executive Director or his/her delegate will be responsible for creating the budget for the Center of Support and any program that does not have a School Director.

Each budget spreadsheet should be accompanied by supporting documentation that will clarify the budget line items. The budget is presented by the Director of Finance and Executive Director and discussed and changed by the Director of Finances as directed by the Board. Suggested month [April/May].

The budget is presented and discussed in the Finance Committee. A recommendation is forwarded to the Board. The Board approves the budget and the School Directors can begin working with the budget, subject to revisions as the year progresses. Suggested month [May]. The Director of Finance will integrate approved budget amounts into the QuickBooks system. Suggested month [June, before the fiscal year begins].

Internal Control

Once the budget is approved, it is up to each Executive Director and the Director of Finances to implement the budget plan. Each School Director will receive a monthly budget-to-actual financial report and will be required to notify the Director of Finance of any questions or discrepancies within the time specified each month by the Director of Finance. The Executive Director will be copied in each of these communications.

If the Director of Finance identifies a program or department that is exceeding its budget then the Executive Director may request an explanation from the School Director and a written plan that once approved and followed will ensure that the school/program will conclude the fiscal year within budget.

If the School Director needs to request a budget modification, he/she will also need to use a "Budget Change Authorization Form." Budget modifications may be needed if the changes involve:

- Moving funds and expenses from one program to another program.
- Moving funds from one line item to another.
- Having obtained funds not previously budgeted; the School Director needs to increase expenditures accordingly.
- Variances within main account category (salaries, professional services, occupancy) that exceed 15**%** of the total approved budget.

A copy of the Budget Change Authorization Form must be submitted to the Director of Finance and the Executive Director and upon their review they will recommend to the Board Chair for approval.

Only after the Budget Authorization Form is approved by the Board Chair or will the budget be changed in the QuickBooks Fund Accounting system.

Cash/Investment Management

Overview

Cash and investment management focuses on control of the funds and on the methods used for investing current operating cash and reserve funds.

Policy

The Executive Director, empowered and authorized by the Board, supervise and oversee the investment of the organization's funds. The investment policy should be reviewed by the Board at

least once a year to ascertain that the immediate and long term goals of the organization are enhanced rather than hindered, as well as reviewing the current and forecasted market conditions. It is suggested that the Board review the investment policy at the same Board meeting as the budget is approved [April].

Cash Management

Quest will maintain several bank accounts, as necessary, to accommodate the operational needs and savings goals. The Treasurer or Chair authorizes the Executive Director to open and close bank accounts. The Board also authorizes the signatories of each bank account. These are the suggested accounts:

Operating Account

The primary operating account provides for routine business check disbursements, payroll disbursements and all regular deposits from external sources. This should be an interest-bearing account, if possible.

Operating funds, by nature, will have the greatest volume of activity. Checks written in excess of $14,999 will require authorization from the Chair of the Board. Bills will be paid within 30 days or the legal limits granted by the vendor, but not aged to the point where Quest will develop a reputation for slow paying.

Deposits into this account should be made within two days from the time the funds are received, to the extent possible.

Savings Account or Other Interest-bearing Account

This is an interest-bearing account for balances in the operational account that will not be needed for expenditures within the next six months, or balances in the operating account exceeding $250,000 (the FDIC insured limit), as decided by the Board.

Funder-Specific Accounts

From time to time Quest may receive grants from a funder that requires that the funds be maintained in a separate bank account. In those cases, Quest must open a separate bank account, if possible interest-bearing and transfer funds to the appropriate checking account as the funds are used.

Capital Reserves

Each year a contribution to the network capital reserves will be assessed to schools. The amount set in the long range budget will be reviewed as part of the yearly budgeting process to ensure that the needs of the school and the network are considered. The assessment will be charged at a time of the year when cash flow at the school will allow the impact of the assessment to be minimized.

Internal Controls

At least on a monthly basis, Quest will receive reports from banks or investment brokers detailing bank and investment activities for that month. These reports will include all transactions, purchase date, amount invested, term, maturity date, interest rate and interest earned.

As with any bank statement these bank reports must be treated as follows:

- Bank statements must be received **unopened** by the Executive Director. The Executive Director reviews the statement, cancelled checks and other documentation included. The Executive Director inquires about unusual or unexpected transactions. If there are none and the Executive Director does not have questions or concerns, he/she signs the statement and forwards it to the Director of Finance.
- The Director of Finance prepares bank reconciliations following the process detailed below. The Executive Director reviews and signs the reconciliations. These signed reconciliations and statements are filed in the bank folders maintained in the Director of Finance's office.
- The Executive Director may also have access to these bank statements through the internet. Access can be granted to the Director of Finance without rights of initiating online transactions.

Bank Reconciliation

Overview

Bank accounts represent an organization's most liquid and sensitive asset. Transactions in the bank account must be reviewed for accuracy and completeness.

Policy

Quest requires that each cash account (operating and other interest-bearing accounts) which has a balance be reconciled to the books monthly (or with the same frequency as the statements are received). The reconciliation will be performed by the Director of Finance.

The same reconciliation policy and procedure will be applied to investment accounts, credit cards, lines of credit or other such account that generates a statement from the financial institution holding the account.

Procedure

Reconciling a bank account is a simple and effective internal control procedure that Quest must implement, but despite its simplicity, it cannot be treated as strictly a clerical process. The process must be initiated with bank statements that have been reviewed and signed by the Executive Director.

The objectives of the bank reconciliation are:
1. To ensure that all transactions in the bank statement are also reflected in the QuickBooks ledger in the same dollar amount.
2. To investigate any differences in amounts or any transactions that are not included in the QuickBooks ledger before changing or adding transactions.
3. To reconcile with a zero (or very close to zero) the bank to QuickBooks ledger balances.
4. To review the detail in the bank reconciliation report under "Uncleared Transactions". Checks that have not cleared for three months after their issue date must be investigated and may require a call to the vendor to whom it was issued. Deposits that have not cleared in more than one month must be investigated very carefully. They could be duplicated in the QuickBooks system or could have been mishandled by the bank. Any electronic transaction (such as direct deposit of payroll) listed under uncleared

transactions must be investigated for possible bank error.

After the reconciliation is performed the following additional steps must be taken:

- A copy of the bank reconciliation with the signed bank statement is forwarded to the Executive Director for review and approval.
- All signed documents are filed at the Quest**'s** Center of Support in a safe locked file cabinet.
- This procedure is repeated monthly for all bank accounts and for all other accounts with the same frequency statements are received.

Dishonored checks

Quest's policy on dishonored or "bounced" checks is as follows:

- The person who wrote the check must be contacted by telephone and by mail or email.
- The Director of Finance or otherwise designee notifies the person in writing that the full amount dishonored plus the bank fee charged to Quest is due and payable immediately The amount is recorded in QuickBooks as a receivable.
- If the amounts remain unpaid after three attempts, the Executive Director must consider whether it should be charged to bad debt.

PayPal Reversals

In the advent that a donor, who utilized PayPal, might seek reimbursement, and the amount was recoded as a receivable to Quest, the adjustment should result in restating the account receivable in the accounting system and be noted as a donation reversal.

Asset Management

Overview

Fixed assets are physical or tangible assets that are used in the normal operations of the business, that are not held for resale, and that have a useful life of more than one year. These assets are accounted for at historical cost and all assets, except land, are subject to depreciation. Controls over physical assets are essential to avoid the unauthorized removal or theft from the organization's location or control.

Policy

It is the policy of Quest to maintain a list of all assets purchased or received as donation. This list must be reconciled at least once per year during a walk-through and physical inventory of the assets maintained (on and off-site). The Director of Finance can perform the walkthrough and reconciliation as part of the audit preparation procedures in December.

It is also the policy of Quest to capitalize all physical assets with a cost in excess of $4,999 and a useful life of more than one year. Items with acquisition (or donated) cost of less than $5,000 or useful lives of less than one year are expended in the year purchased.

Procedure

Establishment of a Fixed Asset Listing

All purchased equipment and furniture having a useful life of more than one year and an acquisition cost of $5,000 or more come under the definition of non-expendable property. A record of all non-expendable property is to be maintained in a property log showing date of purchase, purchase value, a description of the item. The backup documentation will include amount of value of the asset, date purchased, and useful life. The Director of Finance is responsible for maintaining the fixed assets listing in QuickBooks and in Excel.

Assets donated to Quest

Quest accepts donations of fixed assets from other organization and individuals. The value of the asset is indicated by the donor and recorded in QuickBooks as an asset if the value exceeds $4,999. The offsetting entry is a revenue account.
Any Quest staff that gets an offer of donated assets must get approval from the Executive Director and notify the Director of Finance of the donated assets and estimated value.

Dispositions

In the event a non-expendable asset is sold, scrapped, donated or stolen adjustments need to be made to the fixed asset listing and property log. The Executive Director and Director of Finance must be notified in writing within 5 business days. If money is received for the asset then the difference between the money received and the "book value" (purchase price less depreciation) of the asset needs to be entered in the financial statement as a loss if the money received is less than the book value, or gain if it is more.

Donated Assets

Assets of Quest can be donated under the authority of the Executive Director to other non-profit organizations or to government agencies. To donate an asset, Quest should require a letter from the receiving organization requesting the donation with a copy of their IRS determination letter. Quest should then respond with a letter offering the assets and offering a pick up or delivery time and instructions.

Any information technology equipment needs to be cleaned of Quest's files or information before donating.

Write Offs

The Executive Director will approve the disposal of all capitalized items that may be worn-out or obsolete. There are several options for furniture and equipment that have outlived their usefulness, including trade-in or sale.

Property that is discovered to be missing or stolen must be reported immediately to the Executive Director and the Director of Finance. If not located, this property will be written off the books with the proper notation specifying the reason or submitted to insurance.

Depreciation

For financial purposes, all tangible personal property with a useful life of more than one

year and a unit acquisition cost of $4,999 or more shall be capitalized and depreciated over its useful life using the straight-line method of depreciation. All computer software with an aggregate or "whole package as purchased" cost of $4,999 or more will be capitalized and depreciated as well. All capitalized assets shall be maintained in the special fixed assets account group and are not to be included as an operating expense.

Purchasing

Overview

A purchasing system is in place to help facilitate the procurement of supplies and equipment at the lowest reasonable cost, to ensure that purchases are authorized and that the expenditure is made under the approved annual budget.

Policy

The purchasing process for Quest, at this time, is centralized with the School Directors, under the parameters set by the approved annual budget and under the supervision and approval of the Executive Director. All purchasing decisions within budget will be made by the School Directors and also approved for payment by the School Director to the extent that each disbursement (via check, debit card or credit card) does not exceed $4,999.

The School Director's parameters for purchasing will be:
- Purchases from vendors selected under competitive circumstances.
  Purchases made for necessary items.
- Purchases made within the approved annual budget
- Purchases that exceed the annual budget must be authorized by the Chair, unless they exceed the budget line item by 15% of the total budget expense category, in which case they must be authorized by the Board.

At the discretion of the Chair, the Executive Director can establish additional parameters, below those established in this document, to monitor the ability of staff members working for them making purchases, entering into contracts or otherwise committing the organization financially. At any time, when communicated in a clear written format, these new parameters can require authorization of any amount or amounts below the minimum $4,999 otherwise required.

Purchases

Vendor List

Vendors of Quest are selected by price, quality and service for only necessary and approved purchases. All research, cost comparisons and price information is maintained in a centralized vendor file to demonstrate that the vendors were selected under competitive circumstances.

Budgeted Expenditures

Before making expenditures, the Executive Director will verify the remaining budget and will obtain authorization from the Chair for purchases that exceed the remaining budget. A "Budget Change Authorization" form will be used for this purpose. This includes

expenditures of capital equipment. Authorized "Budget Change Authorization" forms will be used to change the budget line items in the QuickBooks system.

Purchase Orders

For normal purchases, a purchase order will be issued through QuickBooks. A Purchase Order Request must be completed by the requestor and authorized by their supervisor. The Request is then forwarded to the Director of Finances, who will then ensure that it is entered into QuickBooks so that funds are properly encumbered.

Purchase Order Request must include:
- The correct G/L code,
- Any backup material that provides item numbers and/costs, &
- Any correspondence, e-mail, faxed quotations, etc. that establish agreed upon terms and conditions.

Upon successful execution of the purchase order, the originator will receive an e-mailed copy of the purchase order for their records.

Once the material is received, the packing slip and or shipping invoice, must be forwarded to the Director of Finances or his/her delegate, so that follow up or closure can be executed.

Credit and Debit Card Purchasing

For convenience, Quest will maintain credit cards made available to personnel pre-authorized by the Executive Director. Each credit card must be used only by the person authorized. Purchases using credit cards must follow the same procedures as purchases using checks. These controls include, among others, budget authorization, and Executive Director's authorization if the transaction exceeds $4,999 and full documentation. The maximum credit line each employee can have on his/her credit card is $10,000.

All employees with credit cards are expected to comply with the following rules to maintain the privilege of having one of the organization's credit cards:

- All credit cards must be used exclusively for Quest-related expenditures.
- Each month a report must be submitted detailing each transaction, its purpose and support documentation. The report must be submitted by the date specified by the Director of Finance each month.
- Credit card transactions and their payment must be approved by the Executive Director.
- Credit card transactions incurred by the Executive Director must be approved by the Chair of the Board or the Treasurer.

Failure to comply with the above rules may result in cancellation of the credit card. If a credit card is cancelled, then the person or Executive Director will need use his/her personal funds and request reimbursement for expenditure related to their Quest tasks or employ a check request and invoicing options to complete their Quest tasks.

Invoice Approval/Delivery Tickets

Receipt of goods will be counted and initialed by the assigned staff as received. The

checked delivery ticket is forwarded to the Director of Finance. Invoices received are matched with the checked delivery tickets by the Director of Finance. Any invoice containing information (price, quality, terms, etc.) that is inconsistent with the delivery ticket will be returned to the assigned staff and investigated and resolved before payment can be made. No payment on an unmatched invoice should be made until the issue has been resolved.

Check Request

All payment or check requests must be submitted by the date specified by the Director of Finance. However, each Executive Director is authorized to assign stricter deadlines on their staff and vendors to allow them to meet the Director of Finance deadlines. At this time, check requests are to be received by close of business Fridays. The form "Quest Check Request" or "Quest Expense Report" must be used.

Check requests will be considered complete if they contain the following information:
- Name of vendor or staff to be paid
- W-9 if the vendor is an individual who has not been paid previously.
- Date of the request
- Date and explanation of the expenditure.
- Program and department (if applicable) to be charged.
- Budget account to be charged
- Signature of requestor
- Signature and approval of Executive Director of the program being charged.

Check requests will be paid during the scheduled check runs and may take up to 30 days from the day the request is submitted to the Director of Finance.

Capital Equipment

The Executive Directors or the Executive Director may negotiate contracts for lease or purchase of capital equipment provided funds are available in the budget. Final approval must be consistent with the limits indicated in the Responsibility Assignment Chart on Part II. The Director of Finance must receive a copy of all executed contracts and letter of agreements. The Executive Directors must indicate on these contracts the account and program (and department, when applicable) to be charged and date payment is required.

Contract Review

All contracts that bind Quest must contain the following basic elements:

o Term or duration of the agreement with clear beginning and ending dates.
    Services or goods to be provided as part of the agreement.
o Clear understanding of the product expected by Quest at the completion of the agreement.
o Amount to be paid for those services or goods. The contract must establish a cap that is consistent with the budget approved for the fiscal year in which the work will be performed. Directors must take into account all contracts for the year as they stay within the budgeted line items.
o Invoice submission schedule, which should not be less frequent than once per month.
o Clarification that invoices submitted will cover services already rendered. The

organization dissuades full advance payments unless there is a clear financial advantage to the organization. Each situation will be considered by its own merits and pre-approved by the Executive Director.

o If a partial deposit or partial advance is required, how will that be recovered – the contract should clearly identify that the advance will be recovered with the first invoice submitted.

o Repayment of advances or deposits for work that was not delivered will be clearly established. Repayment period will also be specified.

o Clarification that Quest's payment cycle requires 30 days from date of submission on invoice to Director of Finance. Incomplete or improperly submitted requests will be returned for corrections. Requests for reimbursements will not be considered as submitted for purposes of the 30-day payment cycle until correctly submitted.

o Reference to "Quest's Travel Policies" and its application to consultants. A copy of this policy and request for reimbursement for consultants should be attached to the contract (if applicable).

o Clarification of other expenses that will be reimbursed under the contract. The contract must specify that all expenses related to the tools, materials and services necessary to carry out the contract will be part of the contract fee and not charged separately.

- Clarification that expenses and invoices will not be paid if submitted more than 30 days after incurred.
- Quest will not agree to pay late fees or interest on unpaid bills unless such contract clause is deemed unavoidable. In such cases, the Executive Director must pre-approve the contract.
- Each contract must be submitted to accounting with all necessary signatures and authorizations and with a completed Form W-9. Invoices under these contracts will not be paid until accounting has full documentation.

All contracts will be reviewed and authorized as follows:

o Contracts must be executed before work can commence. Directors cannot authorize work to commence until full execution of the contract.

o Contracts up to $4,999 and within the approved budget are to be reviewed and approved by the Executive Director or the Executive Director if it affects a program that does not have an Executive Director.

o Contracts between $5,000 and $14,999 and within the approved budget are to be reviewed by the Director of Finance, recommended by the Executive Director and authorized by the Executive Director.

o Contracts exceeding $15,000 require the additional approval of the Board.

Accounts Receivable

Overview

The accounts receivable process is critical to the cash flow of an organization and requires continuous follow-up and attention. Responsibilities should be clearly assigned for creating

the bill, collecting and accounting for accounts receivable.

Policy

Due to the nature of the operations of Quest, accounts receivable could be generated as a result of the following transactions/situation:

> **Donor restricted and unrestricted promises** - a donor promises to donate funds or property to Quest for use in a specific program, for a specific time period or for general operating expenses. At the time the written promise is received, the amount is entered as an account or grant receivable.

It is very important for Quest to record revenue as accounts receivable following the above policy pursuant to the accrual basis of accounting. The accrual basis allows management to have a complete record of the revenues earned during a particular month and/or fiscal year.

Invoicing

Invoicing for donor restricted promises is performed and completed by the assigned staff under the supervision of the Executive Director. Registrants are not invoiced for their registration fees.

Donor Promises

The Executive Director will notify the assigned staff of any written promises received as soon as they are received. Notification will be done with one of the following documents:
- Copy of correspondence received from the donor.
- Memo to the assigned staff from the Executive Director about the written promise received, to include donor name and address, date of the promise, amount promised and date by which the check is expected.
- Email from the Executive Director to the assigned staff indicating the written promise, donor name and address, date of promise, amount of promise and date by which check is expected.

Once the invoice is generated, a copy is sent to the Director of Finance for inclusion in the QuickBooks Fund Accounting system.

Funds Received

Please refer to the Grant's Management Section.

Collection Procedures

Follow-up calls will be made by the Executive Director or his/her designee for all accounts receivable outstanding over ninety days. What is process for 30 and 60 days? What if their processes are like ours?

Reconciliation

At month-end closing, all accounts receivable reports are reviewed to make sure they balance with the general ledger. All outstanding invoices are compared to the accounts receivable aging and then compared to the general ledger. Differences will be resolved before closing of the month. The Director of Finance performs these procedures.

Bad Debt Procedures

Each quarter, the Director of Finance generates an accounts receivable aging to be forwarded to the Executive Director. This list shows all outstanding invoices by due date. If after 120 days the invoice is determined uncollectible, it is suggested that it be written off against bad debt expense with approval by the Treasurer.

Cash Receipts

Overview

Cash is the most liquid asset an organization has. Therefore, internal controls should be strongest in this area. Income is received through two distinct channels at Quest. The first channel is through the mail – donations, grants, memberships and some registrations. The second channel is via wire-transfers – mostly for large grants.

Policy

Controls for cash receipts must include separation of duties, periodic inspections, and reconciliations to the general ledger. Cash and checks received must be deposited within two days from the time the funds are received and recorded in the accounting system as the deposit slip is created. All undeposited funds must be maintained in a locked cabinet until they are prepared for deposit and taken to the bank.

Credit cards must be processed within 5 working days of receipt and must include authorized credit card signature on application, form, etc.

Cash Receipts Processing

Income Received Through the Mail

a. As the mail is opened, any mail containing checks is separated. The checks are immediately endorsed with a "For Deposit Only" stamp identifying Quest's bank and account number.

b. Each check is documented in the "Funds Received Log" by the person assisting the Administrative Assistant (or assigned staff). In any week where funds are received at a school, The School-Site Funds Received Log is forwarded to the Director of Finances at the end of that week. This log is later used by the Director of Finances to confirm that the funds have been deposited in the bank.

c. The endorsed checks received are filed in a locked file cabinet at the Quest's office. They must be immediately safeguarded until prepared for deposit. The assigned staff files the undeposited checks and the Director of Finance prepares these checks for deposit and takes them to the bank.

Income Received Through Wire Transfer

Occasionally, Quest will receive grants through wire transfers. The donor should email the Executive Director or Development Director. This email should be forwarded to the Director of Finance with an indication of the school, program and department to be used for the available funds.

Deposits

Deposits are prepared by creating a deposit slip copying the slip and copying all checks that are included in the deposit, assembling evidence of the deposit as:

- Bank deposit confirmation - Copy of deposit slip, &
- Copy of checks deposited

Reconciliation

- The "Funds Received Log" is reviewed by the Executive Director and used to trace the deposits made in the bank using online banking. It is then initialed by the Executive Director and forwarded to the Director of Finance to trace the funds to those deposited in QuickBooks.
- The "School-Site Receipts Log" is used by the Executive Director to trace the amounts deposited in the bank. The Director of Finance uses the report to reconcile the amounts recorded in QuickBooks as deposited. Such reconciliation is documented by the Executive Director and the Director of Finance initialing the Log.

Grants Management

Overview

Quest receives grants from various foundations, corporations and other not-for-profit organizations. It is important to properly manage the grant process to ensure fiscal responsibility to our funders and their continued support.

Policy

Grants are managed primarily by the Executive Director who is responsible for the grants programmatic goals with assistance from the Development Director (or delegates, as appointed by the Executive Director).

Quest's policy with respect to its grants is to make sure that the grant meets our needs, that Quest meets the requirements of the granting source and that the relationship established and developed during the process leaves open the possibility of future grants.

Process

Grant management follows the normal grant cycle:

- **Proposal And Budget Submission** - the Executive Director, with assistance from the Development Director or School Directors jointly prepare the grant proposal and budget. The Development Director will post a copy of the proposal and budget on Quest's intranet. Execution of the grant agreement or award documentation (when applicable).

- **Grant Approval** – Once the grant is approved, the Development will assist the Executive Director in ensuring the terms, as outlined in the proposal and the grant award letter are feasible for Quest.
  - This is done in consultation with the Executive Director, the Executive Director

and the Director of Finance. It may be necessary to involve the Board when the terms are not within the ordinary course of business of the organization, such as a programmatic audit.

o   If the terms are acceptable, the Executive Director signs the document and the Executive Director, Development Director returns the original to the funding source and maintains a copy for Quest's records. The executed grant agreement is posted on Quest's intranet.

o   Other written documentation - If a grant agreement or award document is not provided with the grant, the Executive Director, Development Director should request a written document specifying any reports expected, any restrictions and time frame for the use of the funds.

o   This written document must be posted on Quest's intranet by the Executive Director, the Development Director.

- **Formal Acknowledgement Of Funds Received** - once the check is received the Executive Director, the Development Director writes an acknowledgement/thank you letter to the funder.

  o   Copy of this letter is posted on Quest's intranet by the Development Director.

  o   Communication with funder if there is any exception with the use of the grant or the time frame of use - As soon as it is clear that Quest will not be able to comply with the budget, the use restrictions, time restrictions or any other term imposed by the funder, the Executive Director, Development Director must begin the negotiation process with the funder.

  o   Any written communication or a memo of verbal agreements must be posted on Quest's intranet by the Executive Director, Development Director.

- **Submission Of Requested Reports** - Financial reports must be prepared by the Director of Finance.

  o   The Development Director notifies the Executive Director and the Director of Finance at least 30 days in advance of due date.

  o   The Director of Finance prepares the financial report, and forwards it to the Executive Director.

  o   The Development Director prepares the narrative portion of the report.

  o   The Executive Director reviews and approves the financial and narrative portions of the report and returns them to the Development Director. Once reviewed for quality control and grant award compliance by the Development Director, both reports are forwarded to the Executive Director for final approval and submission.

  o   The financial report provided by the Director of Finance should not be altered in any way to ensure that the amounts reported can be traced to the financial records.

  o   A complete set of the final reports submitted to funders is posted on Quest's intranet by year, by funder the Development Director.

- **Grant Closing** - Depending on the grant requirements, there may be additional steps necessary to close the grant.

  o   The Executive Director, the Development Director will be responsible for ensuring that these steps are taken, with the assistance of the Executive Director's staff and the Director of Finance.

  o   Any additional documents generated in this step should be forwarded to the Executive Director for approval and submission.

o   All documents are posted on Quest's intranet. In addition, the Executive Director
and the Development Director should get a sense from the funder as to their
willingness to fund future or on-going programs.

Accounts Payable/Disbursements

Overview

Quest strives to maintain efficient business practices and good cost control. A well-managed
accounts payable function can assist in accomplishing this goal from the purchasing decision
through payment and check reconciliation and finally budget adherence.

Policy

The primary objective for accounts payable and cash disbursements is to ensure that:
1.   Disbursements are properly authorized
2.   Vendor bills are processed in a timely manner
3.   Vendor credit terms and operating cash are managed for maximum benefits
4.   All transactions have relevant and sufficient documentation.
5.   All transactions are recorded under the correct account and program/ department.
6.   All transactions are adequately documented as to purpose and other relevant details.

Accounts payable are processed once per week or anytime a payment is needed right away.
Information is entered into the accounting system from approved bills or "Quest Check
Request" that have all necessary documentation attached.

Supporting documentation must be original receipts, bills or invoices.

Disbursement checks are approved and reviewed for accuracy by the Executive Director or the
Director of Finance prior to signing.

Processing Vendor Bills

Quest will process pending bills and pay bills once a week. This is an activity that occurs at
and is directed by the Center of Support (CoS).

Regular Bills
a)   All original incoming bills will be received by the Administrative Assistant (or assigned
staff). The Administrative Assistant will either attach a "Quest Check Request" form or
on the face of the bill initial as authorization for payment and indicate the expense
account and program/department to be charged.   Supporting documentation will be
attached, for all transactions.
b)   The approved bill or check request is forwarded to the Director of Finance.
c)   Bills submitted pursuant to a contract in file will be reviewed against the executed
contract. The Director of Finance (or assigned staff) will enter the bill as an account
payable and, when payment is due, prepare a check for payment.
d)   The check, copies of the bill and attachments (such as supporting documentation) are
forwarded to the Executive Director for check signing. The Executive Director signs
each check as approval of payment.   If the Executive Director or is not available, then
the Treasurer or the Chair can sign.
e)   One of the check stubs is attached to the paid bill and filed in the monthly folder
corresponding to the vendor.

Travel Expenses
Travel expenses will be reimbursed in accordance with the Quest Personnel Policy and
Procedure on Reimbursements.

Other Reimbursed Expenses

a) All expenses need to be approved in advance by the Board in the annual budget.
b) All expense reimbursement requests must be submitted within 30 days after incurring expense and in the "Quest Expense Report".
c) The completed expense reimbursement form includes the employee's signature and receipts for all costs.   All expense requests for the Executive Director are submitted to the Chair for review and approval.
d) The approval process for expense reimbursement is the same as for regular bills.
e) All expenses submitted in the "Quest Expense Report" must include the account, program and department (when appropriate) to be charged.

Cellular Phone

All Quest employees may be eligible to receive a monthly cellular phone stipend.   The maximum amount will be set during the budget preparation process.   The appropriate supervisor will decide which employee receives the stipend and the amount to be paid, not to exceed the maximum amount established.   Payment of this stipend will not require submission or receipts or request for reimbursement.   It will be paid automatically with payroll and will be subject to payroll taxes and withholdings.   This will be pro-rated when an employee is not employed by Quest for the full month.   The reimbursement amount for employees that are not considered full time will be assigned on a case-by-case basis.

Payments Without Bills

a) When payments are requested in advance (without bills and as pre-payment of future expenses) a "Request for Cash Advance" should be completed by the requestor. This advance cannot exceed $500.
b) The approval process for advance request forms is the same as used for regular bills.
     c.   Advances must be justified at the latest on the 10th of each month for expenses incurred the prior month.
c) Advances that have not been justified with bills and a "Quest Expense Report" within
d) 30 days of its disbursement will be charged to the individual. If the individual is an employee, their next payroll will be reduced by the amount advanced and not justified.

Printing Checks

All blank checks are to be kept in a locked file cabinet. Checks should be used in order and all checks, including those voided must be accounted for.

The majority of the checks to be processed by the Director of Finance will be printed directly from QuickBooks and recorded simultaneously (real-time accounting).   If checks are hand-written by the Executive Director or the Director of Finance they will be copied and immediately given to the Director of Finance to be recorded in the accounting system and allow the organization to maintain real-time accounting.

Void/Stop Payment

Voided Checks

Checks may be voided for processing errors by making proper notations in the cash disbursement journal, check register and destroying the signature part of the voided check. A reversing entry is required.

Stop Payments

Stop payment orders may be made for checks lost in the mail or other valid reasons. Stop payments are processed by telephone instruction written authorization to the bank by the Executive Director or the Chair. An entry is made to record the stop payment and any related bank fees. Only the individuals that have check signing authority are also authorized to stop payments.

1099s

Consultants (independent contractors), subcontractors and sub grantees receive payment through the accounts payable system. <u>Before</u> these individuals are paid, the Director of Finance must obtain from them a Form W-9 containing the following information:

- Full name
- Address
- Social security number

Vendors who need to receive a 1099 are noted as such in QuickBooks and their information (as listed above) is entered into QuickBooks. All payments for services require proper authorization and supporting documentation.

Form 1099, as prepared from QuickBooks should be mailed to vendors no later than January 31st for timely preparation and submission of their income tax forms. It is the responsibility of the Director of Finance to prepare and mail 1099 Forms.

Monthly Reconciliation

At the close of each month accounts payable reports are produced and reviewed. These must reconcile to the general ledger control account. Discrepancies will be resolved before the month is closed. Aging payables are reviewed and unusual balances or balances exceeding 90 days are investigated. This is done by the Director of Finance.

Internal Control

Internal control over disbursements is best maintained when the authorization, processing, check signing, and bank reconciliation functions are clearly segregated as follows:

- Pre-Authorization – by the Board through the approval of the annual budget.
- Disbursement Preparation – by the Director of Finance
- Authorization for payment – by the Executive Director
- Check Signing – by the Executive Director
- Bank reconciliation – by the Director of Finance.

Bills will be supported by receipts and/or approval indicating receipt of goods or services. The use of pre-numbered checks ensures numerical control.   Persons authorized to approve expenditures will be identified, and threshold limits established or double signature requirements defined. Authorized check signers should never sign blank checks.

Authorizations

- All Expense Reports and Check Requests must be signed by the requestor.
- All Expense Reports and Check Requests below $5,000 must be authorized by the School Director. School Directors must also sign expense reports exceeding
- $4,999 although authorization for payment is made by the Executive Director.
- Any Expense Report or Check Request must adhere to the policies outlined in the Division of Duties Chart (Table 1).

Payroll

Overview

Payroll is the compensation given to individuals in an organization for time and services provided to the organization. The basis of compensation is generally based on an individual's contribution in the achievement of organizational goals and objectives.

An essential aspect of the payroll function is the accurate classification of individuals who perform work for the organization as either independent contractors or employees.

The processing of payroll generally involves a series of tasks necessary to ensure that employees are properly compensated and that the applicable federal, state and local withholdings are deducted from gross wages. Detailed records must be maintained to support tax deposits required for the aforementioned withholding plus FICA (Social Security), FUTA (Federal Unemployment) and SUI (State Unemployment Insurance). The Director of Finance is responsible for making sure that the policies and internal control procedures are followed. Finally, the payroll function also includes processes for obtaining information from the employees regarding their use of their time, hours worked and leave authorized and used.

Policy

It is Quest's policy to carefully consider the facts and circumstances in the working relationship with an individual to determine whether the individual can be accurately paid as an independent contractor or whether he/she is in essence an employee of the organization.

All new employees are hired by either the Executive Director or a School Director. School Directors are hired by the Executive Director and the Executive Director is hired by the Board. At the time the employee is hired, the staff performing HR functions will collect from the new employee the following information for the files:

- Form W-4 (Federal exemption)
- State withholding exemption
- Form I-9
- Contract or employment offer indicating the employment terms and salary rate.

These documents will be necessary to set up each employee in Quest's payroll system. They are also necessary documents to have in an employee's file. They must be collected no later than the first day of employment. The assigned staff will forward to the Director of Finance a completed and authorized "Personnel Action Form."

Personnel Action Forms will also be generated for the following actions:

- Changes in salary rate
- Changes in hours (from full time to part time and vice versa)
- Employee dismissal or otherwise leaving.
- Changes in withholdings
- Changes in benefits

All personnel action forms must be approved by the Human Resources Director before a copy is submitted to the Executive Director and the Director of Finance. If the personnel action directly affects the Executive Director, then the Chair of the Board must approve the action. All personnel action forms must be filed in the employee's personnel file.

Under the Quest Human Resources Policies and Procedures, payroll advances are not allowed.

Employee Files

All financial documents associated with an employee will be maintained in the employee's personnel file. This file must be set up on the employee's first day of employment and will remain in a locked file cabinet even after the employee ceases to be employed.

Employee versus Independent Contractor

Quest has to evaluate the nature of the relationship with the person performing services in order to correctly classify the person as an employee or an independent contractor. Incorrect classification as an independent contractor could result in costly back taxes and penalties by the Internal Revenue Service, who is now routinely checking for employee salaries disguised as contract labor during their examinations.

Services are many times performed by an individual who is not using a business entity, such as a corporation, a partnership or an LLC as party to the contract for services. In these cases, classifying the individual as an independent contractor can be a difficult decision. To the extent possible Quest should opt to contract a corporation or business entity to avoid the potential liability of incorrectly classifying an employee as an independent contractor.

The most recent factors the IRS is using in their examinations are the following:

Behavioral Controls

1. An employee is usually subject to instructions about when, where and how to work and the employer usually controls how the work results are achieved. Examples are approval before proceeding, rendering services personally and hiring, supervising and paying assistants.
2. Employees are usually trained to perform the services in a particular manner.

Financial Controls

3. Employees usually make a profit from the payments received while independent contractors could realize a profit or a loss if they are unable to recover all the expenses associated with performing the services.
4. An employee does not invest in their own equipment, facilities or tools necessary to perform the work. Independent contractors generally furnish their own tools, materials and supplies.
5. An employee does not make services available to the general public. Independent contractors advertise their services, work for more than one client. This is a very important factor also known as the exclusive use test.
6. Employees generally get paid by the hour, week or month. An independent contractor is generally paid a flat fee or by the job although it is recognized that in professions such as law an accounting services are paid by the hour.

Relationship between the parties

7. A written contract between Quest and the independent contractor should contain the method of compensation, expenses to be reimbursed, and how the work will be performed. However, it is the substance of the contract, not the label that governs the worker status.
8. Employees receive benefits. Independent contractors should not receive any of the benefits given to employees of Quest.
9. Employees usually enjoy a permanent and indefinite relationship.
10. Employees perform a key aspect of the regular business of the company. If the success of the program is dependent, to an appreciable degree upon the worker then there is an employer-employee relationship.

The approval to classify an individual providing service to Quest as independent contractor will follow this process:

- The School Director will forward a completed *Independent Contractor Questionnaire,* contract and IRS Form W-9 to the Director of Finance.
- The Director of Finance will review the documents and recommend to the Executive Director that the individual be considered an independent contractor.

- The Executive Director will make the final decision based on the documents and the recommendation from the Director of Finance.

Preparation of the Payroll

Compensation will be determined by the Payroll Schedule maintained by the Director of Human Capital or their designate. The compensated amount will be prorated and paid in 24 semi-monthly installments on the 15th and the last day of each calendar month through the term of the contract. If these days fall on a Saturday, the employee will be paid on the Friday prior. If the day falls on a Sunday, the employee will be paid the following Monday. The first payment will be distributed on September 15. The last payment will be distributed on August 31st. The Quest School Board has the right to change the paycheck schedule. (will need to be reflected in Finance P&P)

Unless a Personnel Action Form is received within 10 days prior to pay day, the payroll will be processed using the same information as used in the prior pay period.

Once the payroll reports are produced, the Director of Finance will record the payroll expense and associated liabilities in QuickBooks. The Executive Director will approve a copy of the monthly payroll report.

Payroll Taxes

The Director of Finance will be responsible for processing all payroll tax reports monthly, quarterly and yearly, as they come due.

Quest has to implement the following additional procedures to ensure that payroll taxes are handled properly:

- Send to the IRS a Form W-4 for any employee claiming more than 10 exemptions.
- Once per year, request transcript from the IRS and the state of filings done in the previous year ensure that the organization remains in compliance. [around June or July]
- File Forms 1099 and 1096 for payments made to independent contractors who earn $600 or more during the calendar year. This form is sent to the independent contractors by January 31st and to the IRS and state taxing agencies by February 28th.

Internal Control

The Executive Director should have access to the payroll reports to review and confirm the funds spent for payroll against the expense recorded and reported from QuickBooks. Reviewing these reports also allows the Executive Director to confirm the individuals who are getting paid and the amounts they are paid.

Statement Processing

Overview

Preparing financial statements and communicating key financial information is an essential accounting function. Statements are management tools used in making decisions, in monitoring the success of financial objectives and as a standard method for providing information to interested parties external to the organization. These statements may be audited or unaudited depending on the requirements or usage by outside creditors, the governing body or internal management. For best analysis, the financial statements should reflect historical comparisons and current year budget to actual comparisons.

The statement of activities (similar to a Profit and Loss) presented for each program and department reflects the financial activities during a specified period.   A statement of financial position (similar to a Balance Sheet) presents its assets, liabilities and net assets (or equity) and provides a financial "picture" of an organization as of a particular date.

In designing and distributing statements and reports the organization must be aware of the following essential issues:

- Confidentiality
- Purpose to serve - internal or external
- Amount of detail and technical data to include
- Frequency of distribution
- Usage of variances, footnotes and graphics
- Status of Projects or Contracts

Policy

The objective of *Quest* is to prepare accurate financial statements according to Generally Accepted Accounting Principles (GAAP) and distribute them on a timely basis in the most cost effective manner.   Monthly compiled financial statements will be distributed to the Finance Review Committee.   Financial statements will be provided to the Board prior to the Board meetings.   Yearly audited financial statements will be prepared after the fiscal year end (June 30th) and distributed as a draft for Board approval.

Month-End Close

Accounts Payable and Accounts Receivable closing should take place on or about the 15th of the following month and general ledger by the 18th of the following month.

Monthly Closing Entries
The Director of Finance is responsible for completion of the monthly closing checklist, the reconciliation of the schedules to the general ledger and the recording of appropriate adjusting journal entries.

Monthly Closing Checklist:
- Bank accounts reconciliation
- Credit Card reconciliation
- Adjustments to chart of accounts
- Reconcile, adjust and close accounts receivable
- Reconcile, adjust and close accounts payable
- Adjust for prepaid expenses
- Adjust for accrued expenses
- Adjust for depreciation and amortization
- Adjust for donated services, property and rent
- Reconcile subsidiary ledgers to the balances in the system.
- Record and allocate payroll expenses
- Review reports from payroll processing and payroll tax payments made.
- Review allocation of expenses to the funding sources (if applicable)
- Assist in the preparation of the reimbursement requests to funding sources (if applicable).
- Close the period in the system
- Prepare trial balance and financial statements for the board
- Prepare "snapshot" reports with summarized information from each of the financial statements.
- Distribute financial statements
- Discuss financial statements with the Board
- Discuss budget to actual reports with the School Directors and the Executive

o Assess potential problems or issues evident in the financial statements and discuss with the Executive Director and the Board.

Annual Close

Quest closes its fiscal year on June 30th. Procedures, in addition to those performed on a monthly basis, are required to close the fiscal year and prepare the organization for the audit. The following is an example of the procedures most commonly performed:

- Trace beginning balances to prior year audited balances.
- Reconciled total expenses charged under a grant to the funds requested (when reimbursed) and the budget.
- Reconcile payroll transactions to the quarterly reports issued to the IRS.
- Prepare a schedule of net assets – to include temporarily restricted and permanently restricted. The schedule will also include balances forward, additions, releases and ending balances.
- Prepare a schedule of functional expenses by general and administrative, fundraising and program expenses.
- Prepare schedule of assets added, disposed of and depreciation taken.
- Perform walkthrough of assets in the financial statements.
- Write off or reserve bad balances.

After the annual audit, the Director of Finance will prepare audit adjusting entries and perform a final audited close.

Preparation of Statements

After the monthly financial statements are prepared and reviewed, the Director of Finance will forward a copy to the Finance Committee as well as the Executive Director. The statements will include:

- Statement of Financial Position
- Statement of Activities

Each month the Director of Finance will also forward to each Program Director and copy the Executive Director the Budget to Actual YTD comparison reports.

Annual Audit

Overview

An audit is an assessment of the organization's financial condition by an independent organization to render an opinion on the integrity of the organization's finances. Generally, an audit is required by the organization's by-laws and/or by the organization's funding sources and is conducted on an annual basis.

Policy

The **Quest** Board of will determine the level of assurance services necessary; ranging from a full audit, a review; a significantly lesser level of assurance (most of the required procedures for an audit are not performed however; inquiries are made of the organization's finances.) or a compilation; a restatement of the organization's statement of financial position in good financial form with no audit work performed.

Selecting an Auditor

Quest should assign these tasks to the audit committee within the Board. The Audit

Committee should do the following in selecting an auditor:
1. Talk to peers.
2. Seek an auditor that understands and has experience with not-for-profit organizations.
3. Seek an auditor that can provide the services you require.
4. Seek an auditor with whom you can communicate.
5. Have the audit committee or full Board review three (if possible) proposals before selecting one.

The Director of Finance can be asked to assist in the selection process.

Preparation for the Annual Audit

The Director of Finance will do the following in preparing for the annual audit:

1. Planning - Who does what when.
2. Involvement - Director of Finance will do as much work as possible on a monthly basis in order to reduce the cost of the audit.
3. Year-End Procedures:
   a. A list will be received from the auditors of schedules *Quest* can prepare and other items they will need in order to conduct the audit. Examples include:
      o Working trial balance
      o Lead schedules
      o Organization's financial reports
      o Statement of financial position schedules including cash, accounts receivable, investments, notes receivable, inventory, prepaid expense, accounts payable and deferred revenue
      o Reconciliation of net assets
      o Copies of Board of Directors' minutes
      o Preparation of confirmation letters

   b. The Executive Director and Director of Finance will perform the procedures necessary (some of which have been listed in Section XIII) to get ready for the audit during the month of July and August. The audit can then be scheduled to begin in September or October and last no more than 2 months.

Approval and Management Letter

The auditors will issue a draft of the audit and the management letter. These drafted documents will first be reviewed by the Director of Finance and the Executive Director. Any questions or concerns are to be discussed and resolved with the auditors prior to distributing the drafts to the Audit Committee. If the Audit Committee agrees with the draft of the audit, it will be recommended for approved/acceptance by the Board. The draft of the management letter will also be discussed and approved. Any deficiencies discussed in the management letter must be addressed by the Board, with the assistance of the Director of Finance. A letter addressing these matters should be written to the auditors.

Insurance

Overview

It is fiscally prudent to have an active risk management program that includes a comprehensive insurance package. This will ensure the viability and continued operations of *Quest* and peace of mind for the Board.

Policy

Quest must maintain adequate insurance against general liability, as well as coverage for furniture, equipment and leasehold improvements. The organization also needs insurance for the Board members and employment practices.

Procedure

As a guideline, *Quest* will consider the following types and levels of insurance as a minimum in their risk management program:

Type of Coverage	Amount of Coverage
General Liability	$2,000,000
Automobile for Employees, Volunteers or Escorts	$1,000,000
Fire and Water Damage	Coverage for all items with acquisition cost greater than $1,000
Directors and Officers	$2,000,000 (with an adequate deductible level)
Employment Practices	$500,000 (Currently at $5,000)
Theft	Coverage for all items with acquisition cost greater than $1000
Workers' Compensation	As required by law

Record Retention

NOTE: This is Quest's guide for record retention. Computerized data should be backed up daily with one back up copy taken off site at least weekly. If records are maintained off site, care should be taken to ensure that the facility is climate controlled to make sure the longevity of the records, either paper or computer media is maximized. The Sarbanes-Oxley Act addresses the destruction of business records and documents and turns intentional document destruction into a process that must be carefully monitored.

	Retention Period
Accident reports/claims (settled Cases)	7 Years
Accounts payable ledgers and schedules	7 Years
Accounts receivable ledgers and schedules	7 Years
Audit reports	Permanently
Bank reconciliations	2 Years
Bank Statements	3 Years
Cash books	Permanently
Chart of accounts	Permanently
Checks (canceled *)	7 Years
*Canceled for important payments, i.e. taxes, purchases of property, special contracts, etc. Checks should be filed with the papers pertaining to the underlying transaction	Permanently

Contracts, mortgages, notes and leases	
Expired	7 Years
Still in effect	Permanently
Correspondence	
General	2 Years
Legal and important matters only	Permanently
Routine with customers and/or vendors	2 Years
Deeds, mortgages and bills of sale	Permanently
Depreciation schedules	Permanently
Duplicate deposit slips	2 Years
Employment applications	3 Years
Expense analyses/expenses distribution	
schedule	7 Years
Financial statements	
Yearend	Permanently
Other	Optional
Garnishments	7 Years
General ledgers/year end trial balance	Permanently
Insurance policies (expires)	3 Years
Insurance records, current accident reports,	
claims, policies, etc.	Permanently
Internal audit reports	3 Years +
Internal reports	3 Years
Inventories of products, materials	
and supplies	7 Years
Invoices (to customers, from vendors)	7 Years
Journals	Permanently
Minute books of directors, bylaws	
and charters	Permanently
Notes receivable ledgers and	
schedules	7 Years
Payroll records and summaries	7 Years
Personnel records (terminated)	7 Years
Petty cash vouchers	3 Years
Physical inventory tags	3 Years
Property records, including costs,	
depreciation reserves, yearend	
trial balances, depreciation	
schedules, blueprints and plans	Permanently
Purchase orders	
Purchasing department copy	7 Years
Other copies	1 Year
Receiving sheets	1 Year
Retirement and pension records	Permanently
Requisitions	1 Year
Sales records	7 Years
Subsidiary ledgers	7 Years
Tax returns and worksheets, revenue	
agents' reports and other	
documents relating to	
determination of income tax	Permanently
Time books/cards	7 Years
Trademark registrations and	
copyrights	Permanently
Training manuals	Permanently
Voucher register and schedules	7 Years
Withholding tax statements	7 Years

Whistleblower Policy

I. General

The Quest Code of Ethics ("Code") requires the organization's directors, officers, staff and volunteers to observe high standards of business and personal ethics in the conduct of their duties and responsibilities on behalf of Quest. As employees and representatives of the organization, such individuals shall practice honesty and integrity in fulfilling their responsibilities and shall comply with all applicable laws and regulations.

II. Reporting Responsibility

All Quest directors, officers and staff shall comply with the Code and shall report violations or suspected violations in accordance with this Whistleblower Policy.

III. No Retaliation

No director, officer, staff or volunteer who in good faith reports a violation of the Code shall suffer harassment, retaliation or adverse consequence as a result of such reporting. A staff member who retaliates against someone who has reported a violation in good faith is subject to discipline up to and including termination of employment. This Whistleblower Policy is intended to encourage and enable individuals working internally within the organization or on its behalf to raise serious concerns through an established internal process, prior to (and, in certain cases, instead of) seeking resolution outside the organization.

IV. Reporting Violations

Consistent with the Code, individuals subject to this policy should share their questions, concerns, suggestions or complaints with someone who can address them properly. In most cases, an individual's supervisor is in the best position to address an area of concern. However, an individual who is not comfortable speaking with his or her supervisor or who is not satisfied with such supervisor's response should be encouraged to speak with the Executive Director or a Board member whom that individual may feel comfortable in approaching. Directors and Coordinators shall report suspected violations of the Code to the Board Chair directly or through the Executive Director.

V. Accounting and Auditing Matters

The Finance and Audit Committee of the Board of Directors shall address all reported concerns or complaints regarding corporate accounting practices, internal controls or auditing.

VI. Acting in Good Faith

Anyone filing a complaint concerning a violation or suspected violation of the Code shall do so only in good faith and with reasonable grounds to believe that the information disclosed indicates a violation of the Code. Any allegations later shown to be unsubstantiated or false, if proven to have been made maliciously or knowingly (*i.e.*, with knowledge or reckless disregard), shall be viewed as a serious disciplinary offense.

VI. Confidentiality

Violations or suspected violations may be submitted either (i) on a confidential basis by the complainant, or (ii) anonymously. The organization shall implement and maintain a system facilitating the submission of reports in either manner. To the extent possible, reports of violations or suspected violations shall be kept confidential, consistent with the need to conduct an adequate investigation.

VII. Handling of Reported Violations

Within five (5) business days following the submission of a report regarding a violation or suspected violation, the person to whom the report is made (*i.e.*, either the supervisor, the Board Chair or Vice Chair, or another appropriate representative of the organization) shall contact the complainant to acknowledge receipt of the report. All reports shall be promptly investigated, with appropriate and timely corrective action taken if warranted based on the results of the investigation.

In most cases, the investigation shall be conducted by or be at the direction of the Finance and Audit Committee. However, if the reported violation or suspected violation involves participants in such Committee or certain other persons such that the Committee would be unable to conduct an impartial and thorough investigation, the Board Chair and Vice Chair shall confer to designate an alternate committee or individual(s) to undertake or oversee the investigation of the report.

Where reasonably possible based on the outcome of the investigation and the objective of ensuring appropriate confidentiality, complainants shall be informed of the outcome of the investigation and the corrective action taken, if any.

Quest 2013-14 Plan to Educate Children with Disabilities

Plan to Educate Children with Disabilities

Quest-Milwaukee will comply with all applicable state laws, the Individuals with Disabilities Education Act (IDEA & IDEA-97), the Family Educational Rights and Privacy Act (FERPA), and section 504 of the Rehabilitation Act of 1973.

Quest is projecting and budgeting for 15% of our students to need special education services. During our 1st year of operation, we will hire a DPI licensed special education teacher, preferably with experience in charter school operations. Thereafter, we may provide services both directly and/or under contract with outside providers.

Services will be provided with consideration to the Wisconsin Department of Public Instructions, 'Model 2r Charter School Special Education Policies and Procedures', November 2008, Amended July, 2011 (included as an addendum to this document). Quest has met with a representative from the Independent Charter School Collaborative of Wisconsin and intends to have the following in place by the 1st day of school:

- A Child Find, Notice and Brochure,
- A peer review of our Special Education Referral Process,
- A Board adopted customization of the Model 2r Policies and Procedures,
- Any needed modifications to our Discipline Policy to address suspension and expulsions and the Board's role,
- Procedural safeguards for parents,
- Provisions for transfer of records,
- Provisions for Independent Education Evaluations,
- Provisions for releasing information to any outside agencies,
- Procedures that address 504 requirements.

Quest also intends to seek psychological and speech and language services through a contractual arrangement with a local or national provider.

The 1st Level Intervention Team at Quest will be the School Director, appointed subject area teachers, the Director of School Services (during year 3 and thereafter), the School Counselor, and the student advisor assigned to the student. Quest is committed to a program of responsible inclusion for students with special needs. This means that we will offer an education program designed to meet the learning needs and styles of the broadest possible spectrum of students, within the context of an RTI framework.

The 2nd Level Intervention Team will include the 1st Level team, plus the special education teacher. Our special education teacher will work with subject area teachers and special needs students within the subject classrooms and also in separate settings when necessary, to meet the individualized needs of each student, by previewing workshop material and new instructional platform content. The special education teacher and subject area teachers will work together to ensure that identified students remain activated and focused.

Staff will work with identified students for intensive, short-term "pull-asides," returning them to subject area activities with support materials, plans, and follow-up. The special education teacher will also provide strategic direct instruction for some individual students in one-to-one and in small groups within a resource setting, as determined by the IEP Team.

Additionally, the special education teacher will provide subject area teachers with strategic modeling, materials, curricular adaptations and follow-up that elaborates on instruction and practice for identified students, through co-planning and co-teaching. He or she will regularly review each student's level of service and adjusts it to meet his or her academic and social learning needs. The school will use appropriate IEP procedures for making referrals, conducting evaluations, communicating with families, writing and reviewing IEPs, maintaining student records, and reporting to federal and state authorities.

Referral Process

Level 1: Problem Solving
Teachers first bring concerns about a student's welfare and/or academic progress to their School Director, who arranges a meeting with the 1st Level Team and the parent who then collaborate to plan modifications and accommodations to enable the student to be successful in Tier 1 (universal) instruction. Students' progress or lack of is carefully documented in the student information system.

After 5 weeks, the Level Team and the parent will revisit the effects of the interventions to determine whether or not they were effective. Students experiencing academic and/or behavioral problems may or may not have a disability or require special education to meet their educational needs.

Level 2: Necessary Actions
If concerns persist and the intervention strategies are not sufficiently effective after no more than 10 weeks from the beginning of Level 1, the parents and the IEP team must determine whether or not the intervention has been successful and what the next step should be for the student. By analyzing data, one of three decisions may be made:

- The data shows continued improvement. The strategy works with the usual regular classroom supports. The intervention will continue.
- The data shows little or no improvement, and strategy was not implemented as planned. In this case, we would consider whether additional intervention is needed or whether a referral for a full and individual evaluation would be better.
- The data shows little or no improvement, and the teacher and key personnel believe that they have implemented the strategy as planned. When this occurs, refer the student for a full and individual evaluation.

We have met with and it is our intention to enter into a formal relationship with the Independent Charter School Collaborative of Wisconsin to utilize their resources and consulting services.

Model 2r Charter School

Special Education

Policies and Procedures

Developed by
Special Education Team

November 2008; Amended August 2009
Amended July 2011

Wisconsin Department of Public Instruction
Madison, Wisconsin

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Model 2r Charter School Special Education Policies and Procedures

Preface

As a condition of funding under the Individuals with Disabilities Education Act (IDEA), 2r charter schools are required to establish written policies and procedures for implementing federal special education laws. *Model 2r Charter School Special Education Policies and Procedures* has been developed to assist 2r charter schools meet their obligation to establish and implement special education requirements. The model policies and procedures are derived from IDEA regulations and applicable state special education requirements. The IDEA regulations may be found at 34 CFR Part 300, Vol. 71 Federal Register, No. 156 (August 14, 2006). State special education requirements may be found at Subchapter V of Chapter 115, Wis. Stats., and PI 11, Wis. Admin. Code.

A 2r charter school may establish special education requirements by adopting the model policies and procedures. The document may also be used as a reference tool and for staff development activities to promote understanding of and compliance with special education requirements.

Definitions

For the purpose of these policies, the following definitions apply:

- "Assistive technology device" means any item, piece of equipment or product system that is used to increase, maintain or improve the functional capabilities of a child with a disability. The term does not include a medical device that is surgically implanted, or the replacement of that device.

  34 CFR § 300.5

- "Assistive technology service" means any service that directly assists a child with a disability in the selection, acquisition or use of an assistive technology device, including all of the following:

  - evaluating the needs of the child, including a functional evaluation of the child in the child's customary environment;
  - purchasing, leasing or otherwise providing for the acquisition of assistive technology devices by children with disabilities;
  - selecting, designing, fitting, customizing, adapting, applying, maintaining, repairing or replacing assistive technology devices;
  - coordinating and using other therapies, interventions or services with assistive technology devices, such as those associated with existing education and rehabilitative plans and programs;
  - training or technical assistance for a child with a disability or, if appropriate, the child's family; and

- ➢ training or technical assistance for professionals, including individuals providing education and rehabilitation services, employers or other individuals who provide services to, employ or are otherwise substantially involved in the major life functions of that child.

  34 CFR § 300.6

- "Business day" means Monday through Friday, except for federal and state holidays unless holidays are specifically included in the designation of business day.

  34 CFR § 300.11

- "2r Charter school" means a school established by charter by one of the entities listed in Wis. Stats. §118.40(2r)(b).

- "Child" means any person between the ages of 3 and 21, inclusive, who has not graduated from high school with a regular high school diploma, and includes a child who is homeless, a foster child, a child who is a ward of the state, or in the custody of a public child welfare agency.

  34 CFR §§ 300.19, 300.45, and 300.101, 300.102(a)(3)(i)

- "Child with a disability" means a child who by reason of any of the following, needs special education and related services:

  - ➢ cognitive disabilities;
  - ➢ hearing impairments;
  - ➢ speech or language impairments;
  - ➢ visual impairments;
  - ➢ emotional behavioral disability;
  - ➢ orthopedic impairments;
  - ➢ autism;
  - ➢ traumatic brain injury;
  - ➢ other health impairments; and/or
  - ➢ learning disabilities.

  If the 2r charter school determines through an appropriate evaluation that a child has one of the impairments listed above but only needs a related service and not special education, the child is not a child with a disability.

  "Child with a disability" may, at the discretion of the 2r charter school and consistent with Department of Public Instruction rules, include a child aged 3 through 5 who, by reason of his or her developmental delay, needs special education and related services.

  NOTE: Under IDEA 2004 a LEA, which includes 2r charter schools, using the term developmental delay must conform to both the State's definition of that term and to the age range that has been adopted by the State [34CFR300.111(b)(3)].

  34 CFR § 300.8 and 300.311(b)

- "Consent" means:

  ➢ the parent has been fully informed of all information relevant to the activity for which consent is sought, in his or her native language, or other mode of communication;

  ➢ the parent understands and agrees in writing to the carrying out of the activity for which his or her consent is sought, and the consent describes that activity and lists the records (if any) that will be released and to whom; and

  ➢ the parent also understands the granting of consent is voluntary on the part of the parent and may be revoked at any time. If a parent revokes consent, that revocation is not retroactive (i.e., it does not negate an action that has occurred after the consent was given and before the consent was revoked).

  34 CFR § 300.9

- "Controlled substance" means a drug or other substance identified under schedules I, II, III, IV, or V in section 202(c) of the Controlled Substance Act [21 U.S.C. 812(c)].

  34 CFR § 300.530(i)(1)

- "Core academic subjects" means English, reading or language arts, mathematics, science, foreign languages, civic and government, economics, arts, history, and geography.

  34 CFR § 300.10

- "Day" means calendar day unless otherwise indicated as business day or school day.

  34 CFR § 300.11

- "Destruction," as used in the section on confidentiality in these policies, means physical destruction or removal of personal identifiers from information so the information is no longer personally identifiable.

  34 CFR § 300.611(a)

- "Division" means the Division for Learning Support: Equity and Advocacy in the Department of Public Instruction.

  Wis. Stat. § 115.76(6)

- "Education records" means the type of records covered under the definition of "education records" set forth in the regulations implementing the Family Educational Rights and Privacy Act of 1974. See Appendix.

  34 CFR § 300.611(b)

- "Elementary school" means a nonprofit institutional day or residential school, including a public elementary charter school that provides elementary education, as determined under State law. State law defines elementary grades as including K4-8th grade.

  34 CFR § 300.13; Wis. Stat. § 115.01(2)

- "Equipment" means machinery, utilities, and built-in equipment, and any necessary enclosures or structures to house the machinery, utilities, or equipment; and all other items necessary for the functioning of a particular facility as a facility for the provision of educational services, including items such as instructional equipment and necessary furniture; printed, published and audio-visual instructional materials; telecommunications, sensory, and other technological aids and devices; and books, periodicals, documents; and other related materials.

  34 CFR § 300.14

- "Evaluation" means procedures used to determine whether a child has a disability and the nature and extent of the special education and related services the child needs.

  34 CFR § 300.15

- "Extended school year services" means special education and related services that are provided to a child with a disability and meet the standards of the State of Wisconsin. These services are provided beyond the normal school year of the 2r charter school in accordance with the individualized education program (IEP), and at no cost to the parents of the child.

  30 CFR § 300.106(b)

- "Free appropriate public education" means special education and related services that are provided at public expense and under public supervision and direction, and without charge, meet the standards of the Department of Public Instruction, include an appropriate preschool, elementary or secondary school education; and are provided in conformity with an IEP.

  30 CFR § 300.17

- "General curriculum" means the same curriculum as for nondisabled children.

  34 CFR § 300.320(a)(1)(i)

- "Hearing officer" means an independent examiner appointed to conduct due process hearings under Wis. Stat. § 115.80.

  Wis. Stat. § 115.76(8), 34 CFR § 300.511(b) & (c)

- "Highly Qualified Teacher" means that a person has met the Department of Public Instruction's approved or recognized certification, licensing, registration in which he/she is providing special education or related services, consistent with provision 34 CFR § 300.18.

- "Homeless children" has the meaning given the term *homeless children and youths* in section 725 (42 U.S.C. 11434(a)) of the McKinney-Vento Homeless Assistance Act, as amended, 42 U.S.C. 11431 *et seq.* See Appendix.

  34 CFR § 300.19

- "Illegal drug" means a controlled substance but does not include such a substance that is legally possessed or used under the supervision of a licensed healthcare professional or that is legally possessed or used under any other authority under federal law.

  34 CFR § 300.530(i)(2)

- "Include" means that the items named are not all of the possible items that are covered whether like or unlike the ones named.

  34 CFR § 300.20

- "Independent educational evaluation" means an evaluation conducted by a qualified examiner who is not employed by the public agency responsible for the education of the child in question.

  34 CFR § 300.502

- "Individualized education program" (IEP) means a written statement for a child with a disability that is developed, reviewed and revised in accordance with 34 CFR §§ 330.320 through 300.324.

  34 CFR § 300.22

- "IEP Team" means a group of individuals described in 34 CFR § 330.321 that is responsible for developing, reviewing, or revising an IEP for a child with a disability.

  34 CFR § 300.23

- "Limited English Proficiency" has the meaning given the term in section 9101 (25) of the Elementary and Secondary Education Act (ESEA).

- "Local educational agency," except as otherwise provided, means a public board of education or other public authority legally constituted within a State for either administrative control or direction of, or to perform a service function for, public elementary or secondary schools in a city, county, township, school district, or other political subdivision of a State, or for a combination of schools districts or counties as are recognized in a State as an administrative agency for its public elementary schools or secondary schools.

  34 CFR § 300.28(a)

- "Native language," for individuals with limited English proficiency, means the language normally used by that individual. For children with limited English proficiency, the term means the language normally used by the parents of the child, except that in all direct contact with a child (including evaluation of the child), the term means the language normally used by the child in the home or learning environment. For an individual with deafness or blindness, or for an individual with no written language, the mode of communication is that normally used by the individual (such as sign language, Braille, or oral communication).

  34 CFR § 300.29

- "Nonacademic and extracurricular services and activities" may include counseling services, athletics, transportation, health services, recreational activities, special interest groups or clubs sponsored by the public agency, referrals to agencies that provide assistance to individuals with disabilities and employment by the public agency and assistance in making outside employment available.

  34 CFR § 300.107

- "Parent" means any of the following:

  1. a biological or adoptive parent (The biological or adoptive parent, when attempting to act as a parent of the child, must be presumed to be the parent unless that person does not have legal authority to make educational decisions for the child.)
  2. a foster parent, if the right and responsibility of all of the individuals listed in number 1 to make educational decisions concerning the child has been extinguished by termination of parental rights, by transfer of guardianship or legal custody or by other court order;
  3. a legal guardian;
  4. a person acting in the place of a biological or adoptive parent (including a grandparent, stepparent, or other relative) with whom the child lives or an individual who is legally responsible for the child's welfare ; or
  5. a person assigned as a surrogate parent under 34 CFR § 300.519

  If a judicial decree or order identifies a specific person or persons from 1-4 of the list to act as the parent of a child or to make educational decisions on behalf of a child, then such person or persons shall be determined to be the parent.)

  34 CFR § 300.30

- "Participating agency," as used in the section on Confidentiality of Information in these policies, means any agency or institution that collects, maintains or uses personally-identifiable information, or from which information is obtained, under the Individuals with Disabilities Education Act.

  34 CFR § 300.611(c)

- "Personally identifiable" means information that includes the name of the child, the child's parent or other family member; the address of the child; a personal identifier such as the

child's social security number or student number; or a list of personal characteristics or other information that would make it possible to identify the child with reasonable certainty.

34 CFR § 300.32

- "Parentally-placed private school children with disabilities" are children with disabilities enrolled by their parents in private schools or facilities, including religious schools or facilities that meet the definition of elementary school or secondary school, other than children with disabilities placed or referred to private schools by public agencies.

34 CFR § 300.130

- "Public Agency" includes the State Educational Agency, Local Educational Agency, Cooperative Educational Service Agency (CESA), Charter Schools operating under Wis. Stat. § 118.40(2r), County Children with Disabilities Education Board, and any other political subdivisions of the State that are responsible for providing education to children with disabilities.

34 CFR § 300.33

- "Pupil Records" means all records relating to individual pupils maintained by a school but does not include:

  ➢ notes or records maintained for personal use by a teacher or other person to be licensed if such records or notes are not available to others;
  ➢ records necessary for, and available only to persons involved in, the psychological treatment of a pupil; and
  ➢ law enforcement unit records.

Wis. Stat. § 118.125(1)(d)

- "Record" means any material on which written, drawn, printed, spoken, visual, or electromagnetic information is recorded or preserved, regardless of physical form or characteristics.

Wis. Stat. § 118.125(1)(e)

- "Related services" means transportation and such developmental, corrective and other supportive services (including speech-language pathology and audiology services; interpreting services; psychological services; physical and occupational therapy; recreation, including therapeutic recreation; social work services; school health services; school nursing services designed to enable a child with a disability to receive a free appropriate public education as described in the child's IEP; parent counseling and training; counseling services, including rehabilitation counseling; orientation and mobility services; medical services for diagnostic or evaluative purposes only; and the early identification and assessment of disabilities in children) as may be required to assist a child with a disability to benefit from special education. "Related services" does not include a medical device that is surgically implanted, the optimization of device functioning,

maintenance of the device, or the replacement of such a device. Nothing in this definition limits the rights of a child with a surgically implanted device to receive related services as determined by the IEP Team to be necessary, limits the responsibility of a public agency to appropriately monitor and maintain medical devices that are needed to maintain the health and safety of the child, while the child is transported to and from school or is at school; or prevents the routine checking of an external component of a surgically implanted device to make sure it is functioning properly.

34 CFR § 300.34

In this definition:

- ➤ "Audiology" includes:
    - identification of children with hearing loss;
    - determination of the range, nature, and degree of hearing loss including referral for medical or other professional attention for the habilitation of hearing;
    - provision of habilitative activities such as language habilitation, auditory training, speech reading (lip-reading), hearing evaluation and speech conservation;
    - creation and administration of programs for prevention of hearing loss;
    - counseling and guidance of pupils, parents and teachers regarding hearing loss; and
    - determination of the child's need for group and individual amplification, selecting and fitting an appropriate aid and evaluating the effectiveness of amplification.

- ➤ "Counseling services" means services provided by qualified social workers, psychologists, guidance counselors or other qualified personnel.

- ➤ "Early identification and assessment of disabilities in children" means the implementation of a formal plan for identifying a disability as early as possible in a child's life.

- ➤ "Interpreting services," as used with respect to children who are deaf or hard of hearing, includes oral transliteration services, cued language transliteration services, sign language transliteration and interpreting services, and transcription services, and special interpreting services for children who are deaf-blind.

- ➤ "Medical services" means services provided by a licensed physician to determine a child's medically-related disability that results in the child's need for special education and related services.

- ➤ "Occupational therapy" means services provided by a qualified occupational therapist, and includes:
    - improving, developing or restoring functions impaired or lost through illness, injury, or deprivation;

- improving ability to perform tasks for independent functioning if functions are impaired or lost; and
- preventing, through early intervention, initial or further impairment or loss of function.

➢ "Orientation and mobility services" means services provided to blind or visually impaired students by qualified personnel to enable those students to attain systematic orientation to and safe movement within their environments in school, home, and community, and includes teaching students the following, as appropriate:
- spatial and environmental concepts and use of information received by the senses (such as sound, temperature and vibrations) to establish, maintain, or regain orientation and line of travel (for example, using sound at a traffic light to cross the street);
- to use the long cane or a service animal to supplement visual travel skills or as a tool for safely negotiating the environment for students with no available travel vision;
- to understand and use remaining vision and distance low vision aids, as appropriate; and
- other concepts, techniques, and tools.

➢ "Parent counseling and training" means assisting parents in understanding the special needs of their child and providing parents with information about child development, and helping parents to acquire the necessary skills that will allow them to support the implementation of their child's IEP.

➢ "Physical therapy" means services provided by a qualified physical therapist.

➢ "Psychological services" includes:
- administering psychological and educational tests, and other assessment procedures;
- interpreting assessment results;
- obtaining, integrating, and interpreting information about child behavior and conditions relating to learning;
- consulting with other staff members in planning school programs to meet the special educational needs of children as indicated by psychological tests, interviews, direct observations, and behavioral evaluations;
- planning and managing a program of psychological services, including psychological counseling for children and parents; and
- assisting in developing positive behavioral intervention strategies.

➢ "Recreation" includes:
- assessment of leisure function;
- therapeutic recreation services;
- recreation programs in schools and community agencies; and
- leisure education.

➢ "Rehabilitation counseling services" means services provided by qualified personnel in individual or group sessions that focus specifically on career development, employment preparation, achieving independence, and integration in the workplace and community of a student with a disability. The term also includes vocational rehabilitation services provided to a student with disabilities by vocational rehabilitation programs funded under the Rehabilitation Act of 1973, as amended.

➢ "School health services" means health services provided by a qualified school nurse or other qualified person that are designed to enable a child with a disability to receive FAPE as described in the child's IEP.

➢ "School nurse services" mean health services provided by a qualified school nurse, designed to enable a child with a disability to receive FAPE as described in the child's IEP.

➢ "Social work services in schools" includes:
  - preparing a social or developmental history on a child with a disability;
  - group and individual counseling with the child and family;
  - working in partnership with parents and others on those problems in a child's living situation (home, school, and community) that affect the child's adjustment in school;
  - mobilizing school and community resources to enable the child to learn as effectively as possible in his or her educational program; and
  - assisting in developing positive behavioral intervention strategies.

➢ "Speech-language pathology services" include:
  - identification of children with speech or language impairments;
  - diagnosis and appraisal of specific speech or language impairments;
  - referral for medical or other professional attention necessary for the habilitation of speech or language impairments;
  - provision of speech and language services for the habilitation or prevention of communicative impairments; and
  - counseling and guidance of parents, children, and teachers regarding speech and language impairments.

➢ "Transportation" includes:
  - travel to and from school and between schools;
  - travel in and around school buildings; and
  - specialized equipment (such as special or adapted buses, lifts, and ramps), if required to provide special transportation for a child with a disability.

34 CFR § 300.34

- "School day" means any day, including a partial day that children are in attendance at school for instructional purposes. The term "school day" has the same meaning for all children in school, including children with and without disabilities.

  34 CFR § 300.11

- "Scientifically-based research" has the meaning given the term in section 9101(37) of the ESEA. See Appendix.

  34 CFR § 300.35

- "Secondary school" means a nonprofit institutional day or residential school including a public secondary charter school that provides secondary education for grades 9-12.

  34 CFR § 300.36

- "Serious bodily injury" has the meaning given the term "serious bodily injury' under paragraph (3) of subsection (h) of section 1365 of title 18, United States Code.

  34 CFR § 300.530(i)(3). See Appendix.

- "Special education" means specially-designed instruction, regardless of where the instruction is conducted, that is provided at no cost to the child or the child's parents, to meet the unique needs of a child with a disability, including:

  ➢ instruction conducted in the classroom, in the home, in hospitals and institutions, and in other settings;
  ➢ instruction in physical education;
  ➢ speech-language pathology services, or any other related service, if the service consists of specially-designed instruction and is considered special education rather than a related service under Wisconsin standards;
  ➢ travel training; and
  ➢ vocational education.

  The terms in the definition of special education are defined as follows:

  ➢ "At no cost" means that all specially-designed instruction is provided without charge, but does not preclude incidental fees that are normally charged to nondisabled students or their parents as a part of the regular education program.

  ➢ "Physical education" means the development of:
    - physical and motor fitness;
    - fundamental motor skills and patterns; and
    - skills in aquatics, dance, and individual and group games and sports (including intramural and lifetime sports).
    The term includes special physical education, adaptive physical education, movement education, and motor development.

➤ "Specially-designed instruction" means adapting content, methodology or delivery of instruction:
  - to address the unique needs of an eligible child that result from the child's disability; and
  - to ensure access of the child to the general curriculum, so that he or she can meet the educational standards of the 2r charter school that apply to all children.

➤ "Travel training" means providing instruction, as appropriate, to children with significant cognitive disabilities and any other children with disabilities who require this instruction to enable them to develop an awareness of the environment in which they live and learn the skills necessary to move effectively and safely from place to place within that environment (e.g., in school, in the home, at work, and in the community).

➤ "Vocational education" means organized educational programs that are directly related to the preparation of individuals for paid or unpaid employment or for additional preparation for a career requiring other than a baccalaureate or advanced degree.

34 CFR § 300.39

- "Supplementary aids and services" mean aids, services, and other supports that are provided in regular education classes, other education-related settings, and in extracurricular and nonacademic settings to enable a child with a disability to be educated with nondisabled children to the maximum extent appropriate.

34 CFR § 300.42

- A "transfer pupil with a disability" means a child with a disability under the Individuals with Disabilities Education Act whose residence has changed from a local educational agency in this state to another local educational agency in this state or from a public agency in another state to a local educational agency in this State.

34 CFR § 300.323(e) and (f)

- "Transition services" means a coordinated set of activities for a child with a disability that:

  ➤ is designed to be within a results-oriented process that is focused on improving the academic and functional achievement of the child with a disability to facilitate the child's movement from school to post-school activities, including:
    - postsecondary education,
    - vocational education,
    - integrated employment (including supported employment)
    - continuing and adult education
    - adult services
    - independent living, or
    - community participation

- is based on the individual child's needs, taking into account the child's strengths, preferences, and interests; and includes:
  - instruction;
  - related services;
  - community experiences;
  - the development of employment and other post-school adult living objectives; and
  - if appropriate, acquisition of daily living skills and provision of a functional vocational evaluation.

34 CFR § 300.43

- "Universal Design" has the meaning given the term in section 3 of the Assistive Technology Act of 1998, as amended, 29 U.S.C. 3002.

34 CFR § 300.44   See Appendix.

- "Weapon" has the meaning given the term "dangerous weapon" under paragraph (2) of the first subsection (g) of section 930 of title 18, United States Code.

34 CFR § 300.530(i)(4) See Appendix.

Full Educational Opportunity Goal

It is the goal of the 2r charter school to provide full educational opportunity to all children with disabilities served by the 2r charter school. The 2r charter school has available to all of its children with disabilities the variety of educational programs and services available to nondisabled children in the 2r charter school including: art, music, industrial arts, consumer and homemaking education, and vocational education or any program or activity in which nondisabled children participate. The 2r charter school provides supplementary aids and services determined appropriate and necessary by the child's IEP Team, to ensure that children with disabilities have an equal opportunity to participate in nonacademic and extracurricular services and activities.

34 CFR §§ 300.107; 300.109; 300.110; 300.201

Free Appropriate Public Education

General. All children with disabilities for whom the 2r charter school is responsible are provided a free appropriate public education. Special education and related services are provided to these children with disabilities, including, as required by 34 CFR § 300.530(d), children with disabilities who have been suspended or expelled from school. Children with disabilities entitled to a free appropriate public education are children between the ages of 3 and 21, inclusive who have not graduated from high school with a regular high school. A regular high school diploma does not include an alternative degree that is not fully aligned with the State's academic standards, such as a certificate or a general educational development credential (GED). The special education and related services provided to children addresses all of their special education and related services needs and are provided by personnel qualified as required by 34 CFR § 300.156.

34 CFR §§ 300.101(a), 300.102(a)(3)(iv),300.156

The 2r charter school provides prior written notice of a change in placement consistent with the requirements in the law when a child with a disability graduates from high school with a regular diploma. Additionally for those students who graduate from high school with a regular diploma as well as students who exceed the age of eligibility, the 2r charter school provides a summary of their academic achievement and functional performance, including recommendations on how to assist the child in meeting the child's postsecondary goals.

34 CFR §§ 300.102(a)(3)(iii); 300.305(e)(3)

If a placement in a public or private residential program is necessary to provide special education and related services to a child with a disability, the program, including non-medical care and room and board, is provided at no cost to the parents of the child.

34 CFR § 300.104

After a child with a disability has been removed from his or her current placement for ten school days in the same school year, for any subsequent removal, the 2r charter school provides services,

although in another setting, so as to enable the child to continue to participate in the general education curriculum and to progress toward meeting the goals set out in the child's IEP. In such a case, school personnel, in consultation with at least one of the child's teachers, determine the extent of the services. When there is a change of placement, the IEP team determines the appropriate services.

34 CFR § 300.530(d)

Hearing Aids and External Components of Surgically Implanted Medical Devices. The 2r charter school ensures that hearing aids worn in school by children with hearing impairments, including deafness, are functioning properly. The 2r charter school ensures that the external components of surgically implanted medical devices are functioning properly, but is not responsible for the post-surgical maintenance, programming, or replacement of the medical devices that has been surgically implanted, or of an external component of the surgically implanted medical device.

34 CFR § 300.113

Physical Education. Physical education services, specially designed if necessary, are made available to every child with a disability unless the 2r charter school does not provide physical education to children without disabilities in the same grades. Each child with a disability is afforded the opportunity to participate in regular physical education programs available to nondisabled children unless the child is enrolled full time in a separate facility, or the child needs specially-designed physical education as prescribed in the child's IEP.

If specially-designed physical education is prescribed in a child's IEP, the 2r charter school provides the services directly or makes arrangements for those services to be provided through other public or private programs. The 2r charter school ensures that a child with a disability who is enrolled in a separate facility receives appropriate physical education services in compliance with the law.

34 CFR § 300.108

Assistive Technology. The 2r charter school makes available assistive technology devices or assistive technology services, or both, to a child with a disability if required as part of the child's special education, related services, or supplementary aids and services. If a child's IEP team determines that access to school-purchased assistive technology devices or services in the child's home or in other settings is necessary for the child to receive a free appropriate public education, the devices or services are provided.

34 CFR § 300.105

Extended School Year. The 2r charter school ensures that extended school year services are available to each child with a disability as necessary to provide a free appropriate public education. Extended school year services are provided when a child's IEP team determines, on an individual basis, that the services are necessary for the provision of a free appropriate public

education to the child. The 2r charter school does not limit extended school year services to particular categories of disability, or unilaterally limit the type, amount, or duration of those services.

34 CFR § 300.106

Participation in Assessments. Children with disabilities attending this 2r charter school are included in all state-wide and 2r charter school assessment programs with appropriate accommodations. Those children who cannot participate in state-wide or 2r charter school assessments participate in alternate assessments. Needed accommodations or alternate assessments are identified by the IEP team and are specified in the child's IEP.

34 CFR § 300.157; Wis. Stats. 118.30(1)(r)

Methods of Ensuring a Free Appropriate Public Education. If a public agency, other than a 2r charter school fails to meet its obligation under federal or state law or under state policy or interagency agreement to provide or pay for any services that are also considered special education and related services that are necessary for ensuring a free appropriate public education to a child, the 2r charter school provides or pays for these services to the child in a timely manner.

34 CFR § 300.154(b)(2)

When the 2r charter school uses Medicaid or other public insurance benefits programs in which a child participates to provide or pay for special education and related services necessary for the child to receive a free appropriate public education as permitted under the public insurance program, the 2r charter school obtains parent consent each time access to public benefits or insurance is sought.

Furthermore, the 2r charter school does not:

- require parents to sign up for or enroll in public insurance programs in order for their child to receive a free appropriate public education under Part B of the Act;

- require parents to incur an out-of-pocket expense such as the payment of a deductible or co-pay amount incurred in filing a claim for special education and related services; or

- use a child's benefits under a public insurance program if that use would:

  ➢ decrease available lifetime coverage or any other insured benefit,
  ➢ result in the family paying for services that would otherwise be covered by the public benefits or insurance program and that are required for the child outside of the time the child is in school,
  ➢ increase premiums or lead to the discontinuation of benefits or insurance or
  ➢ risk loss of eligibility for home and community-based waivers based on aggregate health-related expenditures.

Each time the 2r charter school proposes to access the proceeds of a parents' private insurance to provide services necessary for the child to receive a free appropriate public education, the 2r charter school:

- obtains informed parent consent; and

- informs the parents that their refusal to permit the 2r charter school to access their private insurance does not relieve the 2r charter school of its responsibility to ensure that all required services are provided at no cost to the parents.

34 CFR § 300.154

The 2r charter school timely provides instructional materials in accessible formats to children who are blind, children with print disabilities, or other children with disabilities as required in the child's IEP.

34 CFR § 300.210

Public Information

The 2r charter school regularly publicizes information about its special education procedures and services. Further, the 2r charter school makes available to any person, upon request, all documents relating to the 2r charter school's eligibility for state and federal special education funds.

34 CFR § 300.212

If the 2r charter school receives a notice from the Department of Public Instruction that it is in noncompliance with respect to federal special education law or applicable state special education law and the Department of Public Instruction is proposing to reduce or withhold any further payments to the 2r charter school until the Department of Public Instruction is satisfied that the 2r charter school is complying with that requirement, the 2r charter school gives public notice of the pending state actions.

34 CFR § 300.222(b)

Child Find

General. The 2r charter school identifies, locates, and evaluates all children with disabilities enrolled in the 2r charter school, regardless of the severity of their disability, who are in need of special education and related services including children who are made a ward of the state, county, or child welfare agency under chapter 54 or 880, highly mobile children such as migrant and homeless children, and children who are suspected of being a child with a disability even though they are advancing from grade to grade.

34 CFR § 300.111

Referral. The 2r charter school accepts and processes referrals of children attending the 2r charter school suspected to have a disability. The 2r charter school has written procedures for accepting and processing referrals. Licensed school personnel who reasonably believe a child has a disability are required to make a referral. Prior to submitting a referral, the people required to make referrals inform the parents of their intent to make a referral.

The local educational agency accepts written referrals. Each referral includes the name of the child and reasons why the person making the referral believes that the child is a child with a disability. The local educational agency documents and dates the receipt of each referral.

At least annually, the 2r charter school informs parents of each student at the 2r charter school and persons required by law to make referrals about the local educational agency's referral and evaluation procedures.

The local educational agency provides information and inservice opportunities for its licensed staff to familiarize them with the local educational agency's referral procedures.

Wis. Stat. § 115.777

> *NOTE: 2r charter schools are required to locate and identify children with disabilities. One method of doing this is to establish a referral system and policies and procedures for referrals as described above.*

IEP Team

Participants. The IEP team for each child consists of all of the following:

- the parents of the child;

- at least one regular education teacher of the child if the child is, or may be, participating in a regular education environment;

- at least one special education teacher of the child who has recent training or experience related to the child's known or suspected area of special education needs or, where appropriate, at least one special education provider of the child;

- a representative of the 2r charter school:

  ➢ who is qualified to provide or supervise the provision of special education,
  ➢ who is knowledgeable about the general education curriculum, and
  ➢ who is knowledgeable about the available resources of the school (who may be another member of the IEP team if the criteria are met);

- an individual who can interpret the instructional implications of evaluation results, who may otherwise be a team member;

- an appropriate therapist if the child is suspected to need occupational therapy or physical therapy or both.

Wis. Admin. Code, Chap. OT 4 and Chap. PT 5

- a department-licensed speech or language pathologist when documenting a speech or language impairment and the need for speech or language services.

Wis. Stats. § 459.24, Wis. Admin. Code § PI 11.36(5)(e)

- at the discretion of the parent or 2r charter school other individuals who have knowledge or special expertise about the child, including related services personnel as appropriate. The determination of the individual's knowledge or special expertise is made by the party (parents or 2r charter school) who invited the individual to be a member of the IEP team;

- whenever appropriate, the child;

In addition to the above members, the 2r charter school invites the following:

- To the extent appropriate, a representative of any participating agency that is likely to be responsible for providing or paying for transition services, if the parents or the child who has reached the age of majority provides consent; and

- The student, when the purpose of the meeting will be consideration of the postsecondary goals for the child and the transition services needed to assist the child in reaching those goals. If the student does not attend the IEP Team meeting, the 2r charter school takes other steps to ensure consideration of the student's preferences and interests.

- If requested by the parent, at the initial IEP Team meeting for a child previously served under Part C, the Part C service coordinator or other representatives of the Part C System will be invited.

34 CFR § 300.321

IEP Team Attendance. An IEP Team member is not required to attend an IEP Team meeting, in whole, or in part, if the parent of a child with a disability and the 2r charter school agree, in writing, that attendance is not necessary because the member's area of curriculum or related services is not being modified or discussed.

An IEP Team member may be excused from attending an IEP Team meeting, in whole or in part, when the meeting involves a modification to or discussion of the member's area of curriculum or related services, if the parent, in writing, and the 2r charter school consent to the excusal, and the member submits, in writing to the parent and the IEP Team, input into the development of the IEP prior the meeting.

34 CFR § 300.321(e)

Parent Participation in IEP Team Meetings. The 2r charter school takes steps to ensure that one or both of the parents of a child with a disability are present at each IEP Team meeting or are afforded the opportunity to participate, including:

- notifying parents of the meeting early enough to ensure that they will have an opportunity to attend; and
- scheduling the meeting at a mutually agreed on time and place.

The notice required in this policy:

- indicates the purpose, time, and location of the meeting and who will be in attendance; informs the parents of the provisions in these policies relating to the participation of other individuals on the IEP team who have knowledge or special expertise about the child; and
- informs the parents that they can request the Part C coordinator or other representatives of the Part C system be at the initial IEP Team meeting for a child previously served under Part C of IDEA.

Beginning no later than in the first IEP that will be in effect when the child turns 16, or younger if determined appropriate by the IEP Team the notice also:

- indicates that a purpose of the meeting is the consideration of the postsecondary goals and transition services for the child;
- indicates that the 2r charter school will invite the student; and
- identifies any other agency that will be invited to send a representative.

If neither parent can attend, the 2r charter school uses other methods to ensure parent participation, including individual or conference calls.

The 2r charter school may conduct meetings without a parent in attendance if the 2r charter school is unable to convince the parents that they should attend. In this case the 2r charter school has a record of its attempts to arrange a mutually agreed on time and place, such as:

- detailed records of telephone calls made or attempted and the results of those calls;
- copies of correspondence sent to the parents and any responses received; and
- detailed records of visits made to the parent's home or place of employment and the results of those visits.

The 2r charter school takes whatever action is necessary to ensure that the parent understands the proceedings at the IEP Team meeting, including arranging for an interpreter for parents with deafness or whose native language is other than English.

The 2r charter school gives the parent a copy of the child's IEP at no cost to the parent.

34 CFR § 300.322, 34 CFR § 300.306(a)(2)

Evaluation

General. As part of an initial evaluation of a child and as part of any reevaluation of a child, the IEP team and other qualified professionals, as appropriate:

- review existing evaluation data on the child, including evaluations and information provided by the child's parents, current classroom-based, local, or state assessments, classroom-based observations, and observations by teachers and related services providers; and

- on the basis of that review and information provided by the child's parents, identifies the additional data, if any, that are needed, to determine:

  ➢ whether the child is a child with a disability, as defined in 34 CFR § 300.8 and the educational needs of the child or, in case of a reevaluation of a child, whether the child continues to have such a disability and the educational needs of the child;

  ➢ the present levels of academic achievement and related developmental needs of the child;

  ➢ whether the child needs special education and related services, or in the case of a reevaluation of a child, whether the child continues to need special education and related services; and

  ➢ whether any additions or modifications to the special education and related services are needed to enable the child to meet the measurable, annual goals specified in the child's IEP and to participate, as appropriate, in the general education curriculum.

- The 2r charter school administers such assessment and other evaluations as may be needed to produce the additional data.

- The review of existing evaluation data on the child may occur without conducting a meeting.

34 CFR § 300.305

The 2r charter school does not require parental consent before reviewing existing data as part of an evaluation or reevaluation or administering a test or other evaluation that is administered to all children unless, before administration of that test or evaluation, the 2r charter school requires consent for all children.

34 CFR § 300.300(d)(1)

Screening of a student by a teacher or specialist to determine appropriate instructional strategies for curriculum implementation is not considered to be an evaluation for eligibility for special education and related services.

34 CFR § 300.302

The 2r charter school provides the parents of the child with proper written notice, of any evaluation procedures the school proposes to conduct.

34 CFR § 300.304(a)

Initial Evaluations. The 2r charter school obtains informed consent from the child's parent before administering assessments or other evaluation materials to the child. Parental consent for the evaluation does not constitute consent for placement for receipt of special education and related services.

34 CFR § 300.300(a)

If the child is a ward of the state and is not residing with the child's parent, the 2r charter school is not required to obtain informed consent from the parent for an initial evaluation if: the 2r charter school cannot, after reasonable efforts, locate the parent of the child; the rights of the parents of the child have been terminated in accordance with state law; or, the rights of the parent to make educational decisions have been subrogated by a judge in accordance with state law and consent for an initial evaluation has been given by an individual appointed by the judge to represent the child.

34 CFR § 300.300(a)(2)

If the parent of a child enrolled in a 2r charter school or seeking to be enrolled in a 2r charter school does not provide consent for an initial evaluation or fails to respond to a request to provide consent, the 2r charter school may, but is not required to, pursue the initial evaluation by utilizing mediation or due process.

34 CFR § 300.300(a)(3)

The 2r charter school does not use a parent's refusal to consent to activities relating to conducting an initial evaluation to deny the parent or child any other service, benefit, or activity of the 2r charter school.

34 CFR § 300.300(d)(3)

Determination of Eligibility or Continuing Eligibility (Initial and Reevaluation). Following a review of existing data and administration of assessments and other evaluation materials (if any), a group of qualified professionals and the parent of the child (evaluation team) determine whether the child is or continues to be a child with a disability. For a child who does not otherwise meet the eligibility criteria under 34 CFR § 300.8, the evaluation team does not determine that the child is a child with a disability solely because the child has received inappropriate instruction in reading or math or because the child has limited proficiency in English. In interpreting evaluation data for the purpose of determining if a child is a child with a disability, and the educational needs of the child, the 2r charter school draws upon information from a variety of sources, including aptitude and achievement tests, parent input, teacher

recommendations, physical condition, social or cultural background, and adaptive behavior. The 2r charter school ensures that information obtained from all of these sources is documented and carefully considered.

34 CFR § 300.306

Timeline. The 2r charter school determines if a child is a child with a disability within 60 days after receiving parental consent for the evaluation or provides notice that no additional data are needed. The 60-day period does not apply:

- if the child enrolls in this 2r charter school before the previous public agency has made an eligibility determination, sufficient progress is being made to ensure a prompt completion of the evaluation, and the child's parents agree to a specific time when the evaluation will be completed;
- if the child's parent repeatedly fails or refuses to produce the child for the evaluation; or
- if a child is being evaluated for a specific learning disability and the timeline is extended by mutual written agreement of the child's parents and IEP team.

The 2r charter school conducts a meeting to develop an IEP within 30 days of a determination that a child is a child with a disability, and as soon as possible following the development of the IEP, special education and related services are made available to the child in accordance with the child's IEP.

34 CFR §§ 300.301; 300.309(c); 300.323

Reevaluation. In conducting reevaluations, the 2r charter school:

- evaluates a child with a disability in accordance with the law before determining that the child is no longer a child with a disability, and

- reevaluates a child with a disability in accordance with the law if the 2r charter school determines that the educational or related services needs of the child, including the child's academic and functional performance, warrant a reevaluation or if the child's parent or teacher requests a reevaluation. The 2r charter school shall reevaluate a child no more than once a year unless the child's parents and the 2r charter school agree otherwise, and at least once every three years unless the child's parent and 2r charter school agree that a reevaluation is unnecessary.

34 CFR §§ 300.303, 300.305(e)(1)

An evaluation is not required before the termination of a child's eligibility for special education and related services because he or she graduated from secondary school with a regular diploma or because he or she reached the age of 21. Under these circumstances, the 2r charter school provides the child with a summary of the child's academic achievement and functional performance, including recommendations on how to assist the child in meeting his or her postsecondary goals.

34 CFR § 300.305(e)(2) and (3)

In conducting a reevaluation, the 2r charter school obtains informed consent from the child's parent before administering new assessments and other evaluation materials. The 2r charter school proceeds without consent only if it has taken reasonable measures to obtain the consent and the child's parents have failed to respond. Reasonable measures are the measures required for conducting an IEP meeting without a parent in attendance. If the parent of a child enrolled in a 2r charter school or seeking to be enrolled in a 2r charter school refuses to provide consent, the 2r charter school is not required to pursue the reevaluation, but may pursue the reevaluation by utilizing mediation or due process.

34 CFR § 300.300(c) and (d)

If the IEP team and other qualified professionals, as appropriate, finds no additional information is needed to determine whether a child continues to be a child with a disability, and to determine the child's educational needs, 2r charter school notifies the child's parents of that finding and the reasons for it, and that the parent has a right to request an assessment to determine whether the child continues to have a disability, and to determine the child's educational needs. The 2r charter school conducts such an assessment if the parent requests it.

34 CFR § 300.305(d)

Evaluation Safeguards. When a 2r charter school evaluates a child with a disability, it:

- does not use any single measure or assessment as the sole criterion for determining whether a child is a child with a disability and for determining an appropriate educational program for the child;

- uses a variety of assessment tools and strategies to gather relevant functional, developmental, and academic information, including information provided by the child's parent, that may assist in determining whether the child is a child with a disability and the content of the child's IEP, including information related to enabling the child to be involved in and progress in the general education curriculum or, for preschool children, to participate in appropriate activities;

- uses technically sound instruments that may assess the relative contribution of cognitive and behavioral factors, in addition to physical or developmental factors; and

- ensures all of the following:

  ➢ assessments and other evaluation materials used to assess a child are selected and administered so as not to be racially or culturally discriminatory and are provided and administered in the child's native language or other mode of communication and in the form most likely to yield accurate information on what the child knows and can do, academically, developmentally, and functionally, unless it is clearly not feasible to do so;

➢ any assessments given to the child have been validated for the specific purpose for which they are used, are administered by trained and knowledgeable personnel and are administered in accordance with any instructions provided by the producer of such assessments or evaluation materials;

➢ assessments and other evaluation materials include those tailored to assess specific areas of educational need and not merely those designed to provide a single general intelligence quotient;

➢ assessments are selected and administered so as best to ensure that if an assessment is administered to a child with impaired sensory, manual, or speaking skills, the assessment results accurately reflect the child's aptitude or achievement level or whatever other factors the test purports to measure, rather than reflecting the child's impaired sensory, manual or speaking skills (unless those skills are the skills the test purports to measure);

➢ the child is assessed in all areas of suspected disability; including, if appropriate, health, vision, hearing, social and emotional status, general intelligence, academic performance, communicative status, and motor abilities;

➢ assessment tools and strategies that provide relevant information that directly assists persons in determining the educational needs of the child are used and;

➢ the evaluation is sufficiently comprehensive to identify all of the child's special education and related services needs whether or not commonly linked to the disability category in which the child has been classified.

34 CFR § 300.304

Evaluation Report. When the 2r charter school determines a child's eligibility, the evaluation team prepares an evaluation report that includes documentation of the determination of eligibility for special education. The 2r charter school gives a copy of the evaluation report including the documentation of determination of eligibility at no cost to the child's parents.

34 CFR § 300.306(a)

Additional Requirements for Specific Learning Disabilities.

When a school begins to use data from a multi-level system of support to consider if the student meets the Insufficient Progress criterion, the IEP team shall include the following additional members**:**

➢ at least one licensed person who is qualified to assess data on individual rate of progress using a psychometrically valid and reliable methodology;
➢ at least one licensed person who has implemented scientific, research-based or evidence-based, intensive interventions with the referred pupil

➢ at least one licensed person who is qualified to conduct individual diagnostic evaluations of children; and

➢ if the child does not have a licensed general education teacher, a general education classroom teacher licensed to teach a child of the same age, or for a child of less than school age, an individual qualified by the Department of Public Instruction to teach a child of his or her age.

PI 11.36(6)

For a child suspected of having a specific learning disability, the documentation of the determination of eligibility shall include:

➢ whether the child has a specific learning disability;

➢ the basis for making that determination, including an assurance that the eligibility determination was based on a variety of sources, including aptitude and achievement tests, parent input, and teacher recommendations, as well as information about the child's physical condition, social or cultural background, and adaptive behavior; and that the information obtained from all of these sources is documented and carefully considered;

➢ the relevant behavior, if any, noted during observation of the child and the relationship of that behavior to the child's academic functioning in the area of potential specific learning disability;

➢ documentation that the intensive intervention was applied in a manner highly consistent with its design, was closely aligned to pupil need, and was culturally appropriate;

➢ the educationally relevant medical findings, if any;

➢ whether the child does not achieve adequately for the child's age or to meet state approved grade-level standards and the child does not make sufficient progress to meet age or State-approved grade-level standards; or until November 30, 2013, the child exhibits a significant discrepancy between the child's academic achievement in any of the eight areas of potential specific learning disabilities and intellectual ability.

➢ the determination of the team concerning the effects of a visual, hearing, or motor disability; mental retardation; emotional disturbance; cultural factors; environmental or economic disadvantage; or limited English proficiency on the child's achievement level; and

➢ if the child has participated in a process that assesses the child's response to scientific, research-based intervention, documentation that the child's parents were notified about the following:
- the progress monitoring data collected;
- strategies for increasing the child's rate of learning including the intensive interventions used, and
- the parents' right to request an evaluation.

Each IEP team member certifies in writing whether the report reflects his or her conclusion. If the evaluation report does not reflect the IEP team member's conclusions, the member submits a separate statement presenting his or her conclusions.

PI 11.36(6)

Determination of Eligibility

A child shall be identified as a child with a disability if the 2r charter school has determined from an evaluation conducted in accordance with §§ 300.304 through 300.311 that the child is a child with a disability as defined in §§ 300.8, 300.111(b)(3) and 300.307(b) and in accordance with the eligibility criteria contained in these policies.

A child will not be determined to be a child with a disability if:

- The determinant factor for that determination is

  - Lack of appropriate instruction in reading, including the essential components of reading instruction as defined in 20 USC 6368(3); or
  - Lack of appropriate instruction in math; or
  - Limited English proficiency; and,

- The child does not otherwise meet the eligibility criteria under 34 CFR §§300.8 300.111(b)(3) and 300.307(b).

34 CFR §§ 300.8, 300.306(b).

Areas of Impairment

All provisions in these policies shall be construed consistent with 20 USC 1400 et. Seq. and the regulations promulgated thereunder.

Wis. Admin. Code § PI 11.36

Autism. 34 CFR § 300.8 (c)(1) Wis. Admin. Code § PI 11.36(8)
Autism means a developmental disability significantly affecting a child's social interaction–and verbal and nonverbal communication, generally evident before age 3, that adversely affects learning and educational performance. Other characteristics often associated with autism are engagement in repetitive activities and stereotyped movements, resistance to environmental change or change in daily routines, and unusual responses to sensory experiences. The term does not apply if a child's educational performance is adversely affected primarily because the child has an emotional behavioral disability as defined in Wis. Admin. Code § PI 11.36(7).

The results of standardized or norm-referenced instruments used to evaluate and identify a child under this paragraph may not be reliable or valid. Therefore, alternative means of-evaluation, such as criterion-referenced assessments, achievement assessments, observation and work samples shall be considered to identify a child under this paragraph. Augmentative communication strategies, such as facilitated communication, picture boards or signing shall be considered when evaluating a

child under this paragraph. To identify a child as a child with autism, the criteria under 1. and 2. and one or more criteria under 3. through 6. shall be met.

1. The child displays difficulties or differences or both in interacting with people and events. The child may be unable to establish and maintain reciprocal relationships with people. The child may seek consistency in environmental events to the point of exhibiting rigidity in routines.

2. The child displays problems which extend beyond speech and language to other aspects of social communication, both receptively and expressively. The child's verbal language may be absent or, if present, lacks the usual communicative form which may involve deviance or delay or both. The child may have a speech or language disorder or both in addition to communication difficulties associated with autism.

3. The child exhibits delays, arrests, or regressions in motor, sensory, social or learning skills. The child may exhibit precocious or advanced skill development, while other skills may develop at normal or extremely depressed rates. The child may not follow normal developmental patterns in the acquisition of skills.

4. The child exhibits abnormalities in the thinking process and in generalizing. The child exhibits strengths in concrete thinking while difficulties are demonstrated in abstract thinking, awareness and judgment. Perseverant thinking and impaired ability to process symbolic information may be present.

5. The child exhibits unusual, inconsistent, repetitive or unconventional responses to sounds, sights, smells, tastes, touch or movement. The child may have a visual or hearing impairment or both in addition to sensory processing difficulties associated with autism.

6. The child displays marked distress over changes, insistence on following routines and a persistent preoccupation with or attachment to objects. The child's capacity to use objects in an age-appropriate or functional manner may be absent, arrested or delayed. The child may have difficulty displaying a range of interests or imaginative activities or both. The child may exhibit stereotyped body movements.

Cognitive Disability. Wis. Admin. Code § PI 11.36(1)
Cognitive disability means significantly subaverage intellectual functioning, exists concurrently with deficits in adaptive behavior and that adversely affects educational performance. The evaluation team may identify a child as having a cognitive disability if the child meets the criteria under 1.a. or b., 2. and 3.a. or b. as follows:

1.a. The child has a standard score of 2 or more standard deviations below the mean on at least one individually administered intelligence test developed to assess intellectual functioning.

b. The child has a standard score between 1 and 2 standard deviations below the mean on at least one individually administered intelligence test, the child has been documented

as having a cognitive disability in the past, and the child's condition is expected to last indefinitely.

2. The child has deficits in adaptive behavior as demonstrated by a standard score of 2 or more standard deviations below the mean on standardized or nationally-normed measures, as measured by comprehensive, individual assessments that include interviews of the parents, tests, and observations of the child in adaptive behavior which are relevant to the child's age, such as:

    a. Communication.
    b. Self-care.
    c. Home living skills.
    d. Social skills.
    e. Appropriate use of resources in the community.
    f. Self-direction.
    g. Health and safety.
    h. Applying academic skills in life.
    i. Leisure.
    j. Work.

3.a. The child is age 3 through 5 and has a standard score of 2 or more standard deviations below the mean on standardized or nationally-normed measures, as measured by comprehensive, individual assessments, in at least 2 of the following areas: academic readiness, comprehension of language or communication, or motor skills.

  b. The child is age 6 through 21 and has a standard score of 2 or more standard deviations below the mean on standardized or nationally-normed measures, as measured by comprehensive, individual assessments, in general information and at least 2 of the following areas: written language, reading, or mathematics.

NOTE: Cognitive disabilities typically manifest before age 18. An etiology should be determined when possible, so the evaluation team can use this information for program planning.

Emotional Behavioral Disability. Wis. Admin. Code § PI 11.36(7)

Emotional behavioral disability, pursuant to Wis. Stat. § 115.76(5)(a)5, means social, emotional or behavioral functioning that so departs from the generally accepted, age appropriate ethnic or cultural norms that it adversely affects a child's academic progress, social relationships, personal adjustment, classroom adjustment, self-care or vocational skills. The evaluation team may identify a child as having an emotional behavioral disability if the child meets the preceding definition and meets all of the following:

- The child demonstrates severe, chronic and frequent behavior that is not the result of situational anxiety, stress or conflict.

- The child's behavior described under par.(a) occurs in school and in at least one other setting.

- The child displays any of the following:

  ➢ Inability to develop or maintain satisfactory interpersonal relationships.
  ➢ Inappropriate affective or behavioral response to a normal situation.
  ➢ Pervasive unhappiness, depression, or anxiety.
  ➢ Physical symptoms, pains or fears associated with personal or school problems.
  ➢ Inability to learn that cannot be explained by intellectual, sensory, or health factors.
  ➢ Extreme withdrawal from social interactions.
  ➢ Extreme aggressiveness for long period of time.
  ➢ Other inappropriate behaviors that are so different from children of similar age, ability, educational experiences and opportunities that the child or other children in a regular or special education program are negatively affected.

The evaluation team shall rely on a variety of sources of information, including systematic observations of the child in a variety of educational settings and shall have reviewed prior, documented interventions. If the evaluation team knows the cause of the disability under this paragraph, the cause may be, but is not required to be, included in the evaluation team's written evaluation summary.

The evaluation team may not identify or refuse to identify a child as a child with an emotional behavioral disability solely on the basis that the child has another disability, or is socially maladjusted, adjudged delinquent, a dropout, chemically dependent, or a child whose behavior is primarily due to cultural deprivation, familial instability, suspected child abuse or socio-economic circumstances, or when medical or psychiatric diagnostic statements have been used to describe the child's behavior.

Hearing Impairment. Wis. Admin. Code § PI 11.36(4)
Hearing impairment, including deafness, means a significant impairment in hearing, with or without amplification whether permanent or chronically fluctuating, that significantly adversely affects a child's educational performance including academic performance, speech perception and production, or language and communication skills. A current evaluation by an audiologist licensed under Wis. Stat. ch. 459 shall be one of the components for an initial evaluation of a child with a suspected hearing impairment.

Specific Learning Disability. Wis. Admin. Code § PI 11.36(6)
Specific learning disability, means a disorder in one or more of the basic psychological processes involved in understanding or using language, spoken or written, that may manifest itself in an imperfect ability to listen, think, speak, read, write, spell or perform mathematical calculations, including conditions such as perceptual disabilities, brain injury, minimal brain dysfunction, dyslexia and developmental aphasia. The term does not include learning problems that are primarily the result of visual, hearing, motor disabilities, cognitive disabilities, emotional disturbance, cultural factors, environmental, or economic disadvantage.

The IEP team may identify a child as having a specific learning disability if both of the following apply:

1. Inadequate Classroom Achievement
   Upon initial identification, the child does not achieve adequately for his or her age, or meet state-approved grade-level standards in one or more of the following eight areas of potential specific learning disabilities when provided with learning experiences and instruction appropriate for the child's age: oral expression, listening comprehension, written expression, basic reading skill, reading fluency skills, reading comprehension, mathematics calculation, and mathematics problem solving.

   A child's achievement is inadequate when the child's score, after intensive intervention, on one or more assessments of achievement is equal to or more than 1.25 standard deviations below the mean in one or more of the eight areas of potential specific learning disabilities. Assessments shall be individually administered, norm-referenced, valid, reliable, and diagnostic of impairment in the area of potential specific learning disabilities.

   The 1.25 standard deviation requirement may not be used if the IEP team determines that the child cannot attain valid and reliable standard scores for academic achievement because of the child's test behavior, the child's language proficiency, an impairment of the child that interferes with the attainment of valid and reliable scores, or the absence of individually administered, norm-referenced, standardized, valid, and reliable diagnostic assessments of achievement appropriate for the child's age. If the IEP team makes such a determination, it shall document the reasons why it was not appropriate to consider standardized achievement testing, and shall document that inadequate classroom achievement exists in at least one of the eight areas of potential specific learning disabilities using other empirical evidence.

   The IEP team may consider scores within 1 standard error of the measurement of the 1.25 standard deviation criterion above to meet the inadequate classroom achievement criteria if the IEP team determines the child meets all other criteria.

2. Insufficient Progress. Upon evaluation, the child has made insufficient progress in one of the following areas:
   a. *Insufficient response to intensive, scientific, research-based or evidence-based intervention*. The child does not make sufficient progress to meet age or state-approved grade-level standards in one or more of the eight areas of potential specific learning disabilities when using a process based on the child's response to intensive, scientific, research-based or evidence-based interventions.

   Intensive interventions may be implemented prior to referral, or as part of an evaluation, for specific learning disability. The IEP team shall consider progress monitoring data from at least two intensive, scientific, research-based or evidence-based interventions, implemented with adequate fidelity and closely aligned to individual student learning needs. The median score of three probes is required to establish a stable baseline data point for progress monitoring. IEP teams shall use weekly or more frequent progress monitoring to evaluate rate of progress during intensive, scientific, research-based or evidence-based interventions.

Rate of progress during intensive interventions is insufficient when any of the following areas are true: the rate of progress of the referred child is the same or less than that of his or her same-age peers; the referred child's rate of progress is greater than that of his or her same-age peers but will not result in the referred child reaching the average range of his or her same-age peers' achievement for that area of potential disability in a reasonable period of time; or the referred child's rate of progress is greater than that of his or her same-age peers, but the intensity of the resources necessary to obtain this rate of progress cannot be maintained in general education.

If the LEA decides to use insufficient response to intensive, scientific, research-based or evidence-based intervention for any child being evaluated for specific learning disabilities enrolled in a school, the LEA shall use insufficient response to intensive, scientific, research-based or evidence-based interventions for all such evaluations of children enrolled in that school. At least ten days in advance of beginning to use insufficient response to intensive, scientific, research-based or evidence-based intervention in a school, the LEA will notify parents of all children enrolled in that school of the intent to use insufficient response to intensive, scientific, research-based or evidence-based intervention.

b. *Significant discrepancy or insufficient progress in achievement as compared to measured ability*. LEAs are permitted to use this option until November 30, 2013.

Upon initial evaluation, the child exhibits a significant discrepancy between the child's academic achievement in any of the eight areas of potential specific learning disabilities and intellectual ability as documented by the child's composite score on a multiple score instrument or the child's score on a single score instrument.

The IEP team may base a determination of significant discrepancy only upon the results of individually administered, norm-referenced, valid, and reliable diagnostic assessment of achievement. A significant discrepancy means a difference between standard scores for ability and achievement equal to or greater than 1.75 standard errors of the estimate below expected achievement, using a standard regression procedure that accounts for the correlation between ability and achievement measures.

This regression procedure shall be used except when the IEP team determines that the child cannot attain valid and reliable standard scores for intellectual ability or achievement because of the child's test behavior, the child's language, another impairment of the child that interferes with the attainment of valid and reliable scores, or the absence of valid and reliable standardized, diagnostic tests appropriate for the child's age. If the IEP team makes such a determination, it shall document the reasons why it was not appropriate to use the regression procedure and shall document that a significant discrepancy exists, including documentation of a variable pattern of achievement or ability, in at least one of the eight areas of potential specific learning disabilities using other empirical evidence.

If the discrepancy between the child's ability and achievement approaches but does not reach the 1.75 standard error of the estimate cut-off for this subdivision paragraph, the child's performance in any of the eight areas of potential specific learning disabilities is variable, and the IEP team determines that the child meets all other criteria, the IEP team may consider that a significant discrepancy exists.

The IEP team may not identify a child as having a specific learning disability if the team's findings of inadequate classroom achievement or insufficient progress are primarily due to one of the following exclusionary factors:

- environmental, economic disadvantage or cultural factors;
- lack of appropriate instruction in reading, including in the essential components of reading instruction;
- lack of instruction in math;
- limited proficiency in English;
- any of the other impairments; and
- lack of appropriate instruction in the area(s) of potential specific learning disability under consideration.

The child must be systematically observed in the child's learning environment, including the general classroom setting when possible, to document the child's academic performance and behavior in any of the eight areas of potential specific learning disabilities.

The systematic observation of routine classroom instruction and monitoring of the child's performance in at least one of the eight areas of potential specific learning disabilities may be conducted before the child was referred for evaluation, or the systematic observation of the child's academic performance in at least one of the eight areas of potential specific learning disabilities shall be conducted after the child has been referred for an evaluation and parental consent is obtained. If the child is less than school age or out of school, at least one member of the IEP team will conduct a systematic observation of the child in an environment appropriate for a child of that age.

If the child has participated in a process that assesses the child's response to intensive, scientific, research-based or evidence-based interventions, the IEP team will use information from a systematic observation of pupil behavior and performance in the area or areas of potential specific learning disability during intensive intervention for that area, conducted by an individual who is not responsible for implementing the interventions with the referred pupil.

In addition to all other determinations, the IEP team shall base its decision of whether a child has a specific learning disability on a comprehensive evaluation using formal and informal assessment data regarding academic achievement and learning behavior from sources such as standardized tests, error analysis, criterion referenced measures, curriculum-based assessments, pupil work samples, interviews, systematic observations, analysis of the child's response to previous interventions, and analysis of classroom expectations and curriculum.

Upon reevaluation, a child who met initial identification criteria and continues to demonstrate a need for special education, including specially designed instruction, is a child with a disability

under this section, unless the exclusionary factors now apply. If a child with a specific learning disability performs to generally accepted expectations in the general education classroom without specially designed instruction, the IEP team shall determine whether the child is no longer a child with a disability.

Orthopedic Impairment. Wis. Admin. Code § PI 11.36(2)
Orthopedic impairment means a severe orthopedic impairment that adversely affects a child's educational performance. The term includes but is not limited to impairments caused by congenital anomaly, such as clubfoot or absence of some member; impairments caused by disease such as poliomyelitis or bone tuberculosis; and impairments from other causes such as cerebral palsy, amputations, and fractures or burns that cause contractures.

Other Health Impairment. 34 CFR § 300.8 (c)(9); Wis. Admin. Code § PI 11.36(10)
Other health impairment means having limited strength, vitality or alertness due to chronic or acute health problems. The term includes but is not limited to asthma, attention deficit disorder or attention deficit hyperactivity disorder, diabetes, epilepsy, a heart condition, hemophilia, lead poisoning, leukemia, nephritis, rheumatic fever, sickle cell anemia, and Tourette syndrome or acquired injuries to the brain caused by internal occurrences or degenerative conditions, which adversely affects a child's educational performance.

Significant Developmental Delay. Wis. Admin. Code § PI 11.36(11)
Significant Developmental delay means children, ages 3, 4 and 5 years of age or below compulsory school attendance age who are experiencing significant delays in the areas of physical, cognition, communication, social-emotional, or adaptive development.

All other suspected impairments are considered before identifying a child's primary impairment as significant developmental delay.

A child may be identified as having significant developmental delay when delays in development significantly challenge the child in two or more of the following five major life activities:

- Physical activity in gross motor skills such as the ability to move around and interact with the environment with appropriate coordination, balance and strength; or fine motor skills, such as manually controlling and manipulating objects such as toys, drawing utensils and other useful objects in the environment.

- Cognitive activity such as the ability to acquire, use and retrieve information as demonstrated by the level of imitation, discrimination, representation, classification, sequencing and problem-solving skills often observed in a child's play.

- Communication activity in expressive language such as the production of age-appropriate content, form and use of language; or receptive language, such as listening, receiving and understanding language.

- Emotional activity such as the ability to feel and express emotions and develop a positive sense of oneself; or social activity, such as interacting with people, developing friendships with peers and sustaining bonds with family members and other significant adults.

- Adaptive activity, such as caring for his or her own needs and acquiring independence in age-appropriate eating, toileting, dressing and hygiene tasks.

Documentation of significant developmental delays and their detrimental effect upon the child's daily life shall be based upon qualitative and quantitative measures including all of the following:

- A developmental and basic health history including results from vision and hearing screenings and other pertinent information from parents and, if applicable, other caregivers or service providers.

- Observation of the child in his or her daily living environment such as the child's home with a parent or caregiver or an early education or care setting which includes peers who are typically developing. If observation in these settings is not possible, observation in an alternative setting is permitted.

- Results from norm-referenced instruments are used to document significant delays of at least one and one-half standard deviations below the mean in two or more of the developmental areas which correspond to the major life activities. If it is clearly not appropriate to use norm-referenced instruments, other instruments such as criterion-referenced measures are used to document the significant delays.

NOTE: IDEA 2004 permits the identification of children with significant developmental delay (SDD) through the age of nine. The department's current rule under PI 11.36 of the Wis. Adm. Code, relating to SDD permits identification only to the age of six. The Department of Public Instruction has promulgated a proposed rule amending PI 11.36(11)(a) to extend the SDD age limit through age nine. Because the proposed rule has not been adopted as this date, the model policies do not reflect this change.

Speech and Language Impairment. Wis. Admin. Code § PI 11.36(5)

Speech or language impairment of speech or sound production, voice fluency, or language that significantly affects educational performance or social, emotional or vocational development. The evaluation team may identify a child as having a speech or language impairment if the child meets the preceding definition and meets any of the following criteria:

- The child's conversational intelligibility is significantly affected and the child displays at least one of the following:
  - ➢ The child performs on a norm referenced test of articulation or phonology at least 1.75 standard deviations below the mean for his or her chronological age.
  - ➢ Demonstrates consistent errors in speech sound production beyond the time when 90% of typically developing children have acquired the sound.

- One or more of the child's phonological patterns of sound are at least 40% disordered or the child scores in the moderate to profound range of phonological process use in formal testing and the child's conversational intelligibility is significantly affected.

- The child's voice is impaired in the absence of an acute, respiratory virus or infection and not due to temporary physical factors such as allergies, short term vocal abuse or puberty. The child exhibits atypical loudness, pitch, quality or resonance for his or her age and gender.

- The child exhibits behaviors characteristic of a fluency disorder.

- The child's oral communication or, for a child who cannot communicate orally, his or her primary mode of communication, is inadequate, as documented by all of the following:

  ➢ Performance on norm referenced measures that is at least 1.75 standard deviations below the mean for chronological age.

  ➢ Performance in activities is impaired as documented by informal assessment such as language sampling, observations in structured and unstructured settings, interviews, or checklists.

  ➢ The child's receptive or expressive language interferes with oral communication or his or her primary mode of communication. When technically adequate norm referenced language measures are not appropriate as determined by the evaluation team to provide evidence of a deficit of 1.75 standard deviations below the mean in the area of oral communication, then two measurement procedures shall be used to document a significant difference from what would be expected given consideration to chronological age, developmental level, and method of communication such as oral, manual, and augmentative. These procedures may include additional language samples, criterion referenced instruments, observations in natural environments and parent reports.

The evaluation team may not identify a child who exhibits any of the following as having a speech or language impairment:

- Mild, transitory or developmentally appropriate speech or language difficulties that children experience at various times and to various degrees.

- Speech or language performance that is consistent with developmental levels as documented by formal and informal assessment data unless the child requires speech or language services in order to benefit from his or her educational programs in school, home, and community environments.

- Speech or language difficulties resulting from dialectical differences or from learning English as a second language, unless the child has a language impairment in his or her native language.

- Difficulties with auditory processing without a concomitant documented oral speech or language impairment.

- A tongue thrust which exists in the absence of a concomitant impairment in speech sound production.

- Elective or selective mutism or school phobia without a documented oral speech or language impairment.

The evaluation team shall substantiate a speech or language impairment by considering all of the following:

- Formal measures using normative data or informal measures using criterion referenced data.

- Some form of speech or language measures such as developmental checklists, intelligibility ratio, language sample analysis, minimal core competency.

- Information about the child's oral communication in natural environments.

- Information about the child's augmentative or assistive communication needs.

An evaluation team shall include a department-licensed speech or language pathologist and information from the most recent assessment to document a speech or language impairment and the need for speech or language services.

Traumatic Brain Injury. Wis. Admin. Code § PI 11.36(9)

Traumatic brain injury means an acquired injury to the brain caused by an external physical force resulting in total or partial functional disability or psychosocial impairment, or both, that adversely affects a child's educational performance. The term applies to open or closed head injuries resulting in impairments in one or more areas such as cognition; speech and language; memory; attention; reasoning; abstract thinking; communication; judgment; problem-solving; sensory, perceptual and motor abilities; psychosocial behavior; physical functions; information processing; and executive functions, such as organizing, evaluating and carrying out goal-directed activities. The term does not apply to brain injuries that are congenital or degenerative or brain injuries induced by birth trauma.

Children whose educational performance is adversely affected as a result of acquired injuries to the brain caused by internal occurrences, such as vascular accidents, infections, anoxia, tumors, metabolic disorders and the effects of toxic substances or degenerative conditions may meet the criteria of one of the other impairments.

The results of standardized and norm-referenced instruments used to evaluate and identify a child as traumatic brain injured may not be reliable or valid. Therefore, alternative means of evaluation, such as criterion-referenced assessment, achievement assessment, observation, work samples, and neuropsychological assessment data are considered to identify a child who exhibits total or partial functional disability or psychosocial impairment in one or more areas listed above. Before a child may be identified as traumatic brain injured, available medical information from a licensed physician is considered.

Visual Impairment. Wis. Admin. Code § PI 11.36(3)

Visual impairment means even after correction a child's visual functioning significantly adversely affects his or her educational performance. The evaluation team may identify a child as having a visual impairment after all of the following events occur:

- A certified teacher of the visually impaired conducts a functional vision evaluation which includes a review of medical information, formal and informal tests of visual functioning and the determination of the implications of the visual impairment on the educational and curricular needs of the child.

- An ophthalmologist or optometrist finds at least one of the following:

  - Central visual acuity of 20/70 or less in the better eye after conventional correction.
  - Reduced visual field to 50º or less in the better eye.
  - Other ocular pathologies that are permanent and irremediable.
  - Cortical visual impairment.
  - A degenerative condition that is likely to result in a significant loss of vision in the future.

An orientation and mobility specialist, or teacher of the visually impaired in conjunction with an orientation and mobility specialist, evaluates the child to determine if there are related mobility needs in home, school, or community environments.

Developing, Reviewing and Revising IEPs

IEP in Effect. At the beginning of each school year 2r charter school has in effect an IEP for each enrolled child with a disability. The 2r charter school ensures that a meeting to develop an IEP is conducted within 30 days of determination that the child is a child with a disability. The 2r charter school ensures an IEP is in effect before special education and related services are provided to children with disabilities and is implemented as soon as possible following the meetings at which the IEP is developed. The 2r charter school develops and implements an IEP for each child with a disability served by that school including children placed in or referred to a private school or facility by the 2r charter school.

The 2r charter school ensures each child's IEP is accessible to each regular education teacher, special education teacher, related service provider and any other service provider who is responsible for its implementation. The 2r charter school ensures each teacher and provider responsible for implementing a child's IEP is informed of his or her specific responsibilities related to implementing the child's IEP and the specific accommodations, modifications and supports that must be provided for the child in accordance with the IEP. The 2r charter school provides special education and related services to a child with a disability in accordance with the child's IEP.

The 2r charter school gives a copy of the IEP to the child's parents at no cost.

34 CFR §§ 300.322(f), 300.323(a),(c)and(d)

IEP Development. In developing each child's IEP, the IEP team considers the strengths of the child, the concerns of the child's parents for enhancing the education of their child, and the results of the initial or most recent evaluation of the child, and the academic, developmental, and functional needs of the child.

The IEP team considers the following special factors:

- the use of positive behavioral interventions and supports, and other strategies, to address that behavior in the case of a child whose behavior impedes the child's learning or that of others;

- the language needs of the child as such needs relate to the child's IEP in the case of a child with limited English proficiency;

- instruction in Braille and the use of Braille in the case of a child who is visually impaired unless the IEP team determines, after an evaluation of the child's reading and writing skills, needs, and appropriate reading and writing media, including an evaluation of the child's future needs for instruction in Braille or the use of Braille, that instruction in Braille or the use of Braille is not appropriate for the child;

- the communication needs of the child and, in the case of a child who is deaf or hard of hearing, the child's language and communication needs, opportunities for direct communications with peers and professional personnel in the child's language and communication mode, academic level and full range of needs including opportunities for direct instruction in the child's language and communication mode; and

- whether the child requires assistive technology devices and services.

If when considering these special factors, the IEP team determines a child needs a particular device or service in order to receive a free appropriate public education, the IEP team includes a statement to that effect in the IEP.

The child's regular education teacher, as a member on the IEP team, participates in the development of the IEP of the child to the extent appropriate. The teacher participates in the determination of appropriate positive behavioral interventions and supports and other strategies, supplementary aids and services, program modifications and supports for school personnel.

34 CFR § 300.324(a)

IEP Review and Revision. The IEP team reviews the child's IEP periodically, but at least once a year, to determine whether the annual goals for the child are being achieved and revises the IEP as appropriate to address:

- any lack of expected progress toward the annual goals and in the general education curriculum;
- the results of any reevaluation;
- information about the child provided to or by the parents;
- the child's anticipated needs; or
- other matters.

In conducting a review of the child's IEP, the IEP team considers the special factors listed above under the development of the IEP section.

To the extent appropriate, the regular education teacher of the child, as a member on the IEP team, participates in the review and revision of the IEP of the child.

If a participating agency, other than the 2r charter school fails to provide transition services described in the IEP, the 2r charter school reconvenes the IEP team to identify alternative strategies to meet the transition objectives for the child set out in the IEP.

34 CFR § 300.324(b) and (c)

Amendments to the IEP. In making changes to a child's IEP after the annual IEP team meeting for a school year, the parent of a child with a disability and the 2r charter school may agree not to convene an IEP team meeting for the purposes of making those changes, and instead develop a written document to amend or modify the child's current IEP. If changes are made without a meeting, the 2r charter school informs the child's IEP team of those changes.

Changes to the IEP may be made by either the entire IEP Team at an IEP team meeting or as described above by amending the IEP rather than redrafting the entire IEP. Upon request the 2r charter school gives the child's parent a copy of the revised IEP with the amendments incorporated.

34 CFR § 300.324(a)(4) and (6)

IEP Content. The IEP for each child with a disability includes:

- a statement of the child's present levels of academic achievement and functional performance including how the child's disability affects the child's involvement and progress in the general education curriculum (i.e., the same curriculum as for nondisabled children) or, for a preschool child, as appropriate, how the disability affects the child's participation in appropriate activities;

- a statement of measurable annual goals for the child, including academic and functional goals, designed to meet the child's needs that result from the child's disability to enable the child to be involved in and progress in the general education curriculum and to meet each of the child's other educational needs that result from the child's disability;

- for children with disabilities who take alternate assessments aligned to alternate achievement standards, a description of benchmarks or short-term objectives;

- a statement of the special education and related services and supplementary aids and services, based on peer-reviewed research to the extent practicable, to be provided to the child or on behalf of the child and a statement of the program modifications or supports for school personnel that will be provided to enable the child to:

  ➢ advance appropriately toward attaining the annual goals;
  ➢ be involved in and make progress in the general education curriculum and to participate in extracurricular and other non academic activities; and
  ➢ be educated and participate with other children with disabilities and nondisabled children in the activities described above;

- an explanation of the extent to which the child will not participate with nondisabled children in regular classes in the general education curriculum and in extracurricular and other nonacademic activities;

- a statement of any individual appropriate accommodations that are necessary to measure the academic achievement and functional performance on state- wide or 2r charter school assessments;

- if the IEP team determines a child must take an alternate assessment instead of participating in a particular regular state-wide or 2r charter school assessment of student achievement, a statement indicating why the child cannot participate in the regular assessment and why the particular alternate assessment selected is appropriate for the child;

- the projected date for the beginning of the services and modifications described in the IEP, and the anticipated frequency, duration and location of those services and modifications;

- beginning not later than in the first IEP that will be in effect when the child is 16 or younger if determined appropriate by the IEP team and updated annually thereafter until the child is no longer eligible for special education and related services, a statement of appropriate measurable postsecondary goals based upon age appropriate transition assessments related to training, education, employment, and, where appropriate, independent living skills; and a description of the transition services, including courses of study, needed to assist the child in reaching those goals;

- beginning at least one year before the child attains the age of 18 a statement that the student has been informed of the parental rights that will transfer to the pupil under special education law on reaching the age of 18;

- a description of how the child's progress toward attaining the annual goals will be measured; and

- a description of when periodic reports, such as quarterly reports or other periodic reports issued concurrent with report cards, on the child's progress toward attaining the annual goals will be provided to the parents.

34 CFR § 300.320

Placement

The 2r charter school ensures that a full and individual initial evaluation is conducted before the initial provision of special education and related services to a child with a disability and an educational placement is provided to implement each child's IEP Placement decisions are made by a group of persons, including the parents, and other persons knowledgeable about the child, the meaning of the evaluation data, and the placement options. The placement is based upon and implements the child's IEP, is determined at least annually, and in uniformity with the least restrictive environment provisions described below.

34 CFR §§ 300.301(a); 300.116(b)

Least Restrictive Environment. The 2r charter school ensures the following:

- Unless the IEP requires a different arrangement, the child is educated in the school he or she would attend if not disabled.

- The placement is provided as close as possible to the child's home.

- In selecting the least restrictive environment consideration is given to any potential harmful effect on the child or on the quality of services that he or she needs.

- A child with a disability is not removed from education in age-appropriate regular classrooms solely because of needed modifications in the general education curriculum.

- To the maximum extent appropriate, a child with a disability, including a child receiving publicly funded special education in a public or private institution or other care facility, is educated with children who are not disabled.

- Special classes, separate schooling or any other removal of a child from the regular educational environment occurs only when the nature or severity of a child's disability is such that education in regular classes with the use of supplementary aids and services cannot be achieved satisfactorily.

- The 2r charter school ensures a continuum of alternative placements is available to meet the needs of children with disabilities for special education and related services.

- The 2r charter school ensures a continuum of alternative placements is available and will be used that includes instruction in regular classes, special classes, special schools, home instruction, and instruction in hospitals and institutions.

- The continuum makes provision for supplementary services (such as resource room or itinerant instruction) that are provided in conjunction with regular class placement.

- The 2r charter school provides or arranges for nonacademic and extracurricular services and activities including meals and recess periods so each child with a disability participates with nondisabled children in the extracurricular services and activities to the maximum extent appropriate to the needs of that child. The 2r charter school ensures that each child with a disability has the supplementary aids and services determined by the child's IEP Team to be appropriate and necessary for the child to participate in nonacademic settings.

34 CFR §§ 300.114 through 300.117

Notice of Placement. Following the development of a child's IEP a written notice, that meets the content requirements of notice as described in the notice section contained in these policies and is given to the child's parent(s) a reasonable amount of time before implementing the IEP.

34 CFR § 300.503

Consent For Placement. The 2r charter school obtains informed and written parental consent prior to the initial provision of special education and related services to a child with a disability in a program providing special education and related services.

The 2r charter school makes reasonable efforts to obtain informed consent from the parent for the initial provision of special education and related services to the child. If the parent of a child fails to respond or refuses to consent to services, the 2r charter school cannot provide special education or related services and cannot use mediation or due process procedures in order to obtain agreement or a ruling that the services may be provided to the child.

If the parent of the child refuses to consent to the initial provision of special education and related services, or the parent fails to respond to a request to provide consent for the initial provision of special education and related services, the 2r charter school will not be considered to be in violation of the requirement to make available FAPE to the child for the failure to provide the child with the special education and related services for which the 2r charter school requests consent; and is not required to convene an IEP Team meeting or develop an IEP for the child for the special education and related services for which the 2r charter school requests such consent.

34 CFR § 300.300(b)

Parent Revocation of Consent:

If, at any time subsequent to the initial provision of special education and related services, the parent of a child revokes consent in writing for the continued provision of special education and related services, the school district:

- Will stop providing special education and related services to the child, but before doing so, will provide prior written notice in accordance with 34 CFR § 300.503;
- Will not use special education dispute resolution procedures, including mediation and due process, in order to obtain agreement or a ruling that the services may be provided to the child;
- Is not considered to be in violation of the requirement to make FAPE available to the child because of the failure to provide the child with further special education and related services; and
- Is not required to convene an IEP Team meeting or develop an IEP for the child for further provision of special education and related services;
- Is not required to amend the child's education records to remove any reference to the child's receipt of special education and related services because of the revocation of consent.

34 CFR § 300.300

Related Services: Physical and Occupational Therapy

If a child is suspected to need occupational therapy or physical therapy or both, the IEP team includes an appropriate therapist.

Wis. Stats. § 448; Wis. Admin. Code § OT 4; Wis. Admin. Code § PT 5

Physical Therapists' Licensure and Service Requirements. The 2r charter school ensures the following:

- Physical therapists are licensed by the Department of Public Instruction as school physical therapists.

- The school physical therapist has medical information from a licensed physician regarding a child before the child receives physical therapy.

34 CFR § 300.18; Wis. Stats. §§118.19(1), 118.40(2r)(b)2., 448.51; Wis. Admin. Code §§ PI 34.34(16) and PT 5

Responsibility of A School Physical Therapist. The 2r charter school ensures the following:

- A school physical therapist conducts all physical therapy evaluations and reevaluations of a child, participates in the development of the child's IEP, and develops physical therapy treatment plans for the child.

- A school physical therapist is not represented by a school physical therapist assistant on an IEP team.

Wis. Stats. §§ 448.50(4) and 448.56(1); Wis. Admin. Code § PT 5

Delegation and Supervision of Physical Therapy.

- The school physical therapist delegates to a school physical therapist assistant only those portions of a child's physical therapy which are consistent with the school physical therapist assistant's education, training and experience.

- The school physical therapist supervises the physical therapy provided by a school physical therapist assistant. The school physical therapist develops a written policy and procedure for written and oral communication to the physical therapist assistant. The policy and procedure includes a specific description of the supervisory activities undertaken for the school physical therapist assistant which includes either of the following levels of supervision:

  ➢ the school physical therapist has daily, direct contact on the premises with the school physical therapist assistant; or

  ➢ the school physical therapist has direct, face-to-face contact with the school physical therapist assistant at least once every 14 calendar days. Between direct contacts the school physical therapist is available by telecommunication. The school physical therapist providing general supervision provides an onsite reevaluation of each child's physical therapy a minimum of one time per calendar month or every tenth day of physical therapy, whichever is sooner, and adjusts the physical therapy as appropriate.

- A full-time school physical therapist supervises no more than two full-time equivalent school physical therapist assistant positions which may include no more than three physical therapist assistants.

- Acts undertaken by a school physical therapist assistant are considered acts of the supervising physical therapist who has delegated the act.

Wis. Stats. §. 448.56; Wis. Admin. Code § PT 5

School Physical Therapist Assistants' Qualifications and Supervision of Physical Therapy. The 2r charter school ensures the following:

- Physical therapist assistants are licensed by the Department of Public Instruction as school physical therapist assistants.

- The school physical therapist assistant providing physical therapy to a child is supervised by a school physical therapist as specified in these policies and in accordance with Wis. Admin. Code § PT 5.

Wis. Stats. §§118.19(1), 118.40(2r)(b)2., 448.535; Wis. Admin. Code §§ PI 11.24(8) PI 34.34(15) and PT 5

Occupational Therapists' Licensure and Service Requirements. The 2r charter school ensures the following:

- Occupational therapists are licensed by the Department of Public Instruction as school occupational therapists.

- The school occupational therapist has medical information before a child is evaluated for occupational therapy.

34 CFR § 300.503; Wis. Stats. §§118.19(1), 118.40(2r)(b)2., 448.961(1); Wis. Admin. Code §§ PI 34.34(14) and OT 4

Responsibility of a School Occupational Therapist. The 2r charter school ensures the following:

- A school occupational therapist conducts all occupational therapy evaluations and reevaluations of a child, participates in the development of the child's IEP and develops occupational therapy treatment plans for the child.

- A school occupational therapist may not be represented by a school occupational therapy assistant on an IEP team.

Wis. Stats. § 448.96; Wis. Admin. Code § OT 4

Delegation and Supervision of Occupational Therapy. The 2r charter school ensures the following:

- The school occupational therapist may delegate to a school occupational therapy assistant only those portions of a child's occupational therapy which are consistent with the school occupational therapy assistant's education, training and experience.

- The school occupational therapist supervises the occupational therapy provided by a school occupational therapy assistant. The school occupational therapist develops a written policy and procedure for written and oral communication to the occupational therapist assistant. The policy and procedure includes a specific description of the supervisory activities undertaken for the school occupational therapist assistant which includes either of the following levels of supervision:

  ➢ the school occupational therapist has daily, direct contact on the premises with the school occupational therapy assistant or

  ➢ the school occupational therapist has direct face-to-face contact with the school occupational therapy assistant at least once every 14 calendar days. Between direct

contacts the school occupational therapist is available by telecommunication. The school occupational therapist providing general supervision provides an onsite reevaluation of each child's occupational therapy a minimum of every two weeks, and adjusts the occupational therapy as appropriate.

- A full-time school occupational therapist supervises no more than two full-time equivalent school occupational therapy assistant positions which includes no more than three occupational therapy assistants;

- An act undertaken by a school occupational therapy assistant is considered the act of the supervising school occupational therapist who has delegated the act.

Wis. Stats. § 448.96(6); Wis. Admin. Code § OT 4

School Occupational Therapy Assistants' Qualifications and Supervision. The 2r charter school ensures the following:

- Occupational therapy assistants are licensed by the Department of Public Instruction as school occupational therapy assistants.

- The school occupational therapy assistant providing occupational therapy to a child is supervised by a school occupational therapist as specified in these policies.

Wis. Stats. §§ 448.96(6) and 448.961(2); Wis. Admin. Code §§ PI 34.34(15) and OT 5

Transition from Birth to Three Programs

The 2r charter school participates with birth to three programs to ensure a smooth and effective transition of children with disabilities from the birth to three program for infants and toddlers with disabilities to preschool programs, if any, operated by the 2r charter school. The 2r charter school participates in transition planning conferences arranged by birth to three programs.

For children participating in birth to three programs who will participate in a special education preschool program operated by the 2r charter school, the 2r charter school has an IEP in effect by the child's third birthday.
If a child's third birthday occurs during the summer, the child's IEP Team shall determine the date when services under the IEP will begin.

34 CFR §§ 300.124, 300.101(b)

Transfer Pupils

In-State Transfer Students. When a child with a disability (who had an IEP that was in effect in a previous Wisconsin local educational agency) enrolls in this 2r charter school within the same school year, this 2r charter school (in consultation with the parents) provides FAPE to the

child, including services comparable to those described in the child's IEP from the previous agency, until this 2r charter school either:

- Adopts the child's IEP from the previous public agency; or
- Develops, adopts, and implements a new IEP.

The 2r charter school adopts the evaluation and the eligibility determination of the sending local educational agency or conducts an evaluation and eligibility determination of the transfer pupil. The 2r charter school does not adopt the evaluation and eligibility determination or the IEP of the sending local educational agency if the evaluation and eligibility determination or the IEP do not meet federal and applicable state requirements.

34 CFR § 300.323(e)

Out-of-State Transfer Students. When a child with a disability (who had an IEP that was in effect in a previous public agency in another State) enrolls in this 2r charter school within the same school year, this 2r charter school, in consultation with the parents, provides the child with FAPE, including services comparable to those described in the child's IEP from the out-of-state agency, until this 2r charter school:

- Conducts an evaluation and determines eligibility if determined to be necessary by this 2r charter school; and
- Develops, adopts and implements a new IEP, if appropriate.

34 CFR § 300.323(f)

Transmittal of Records. When this 2r charter school receives a transfer pupil with a disability and does not receive the pupil's records from the child's previous public agency, this 2r charter school takes reasonable steps, to promptly obtain the child's records, including the IEP and supporting documents and any other records relating to the provision of special education or related services to the child from the previous public agency in which the child was enrolled.

When this 2r charter school receives such a request for records for a transfer pupil, this 2r charter school promptly transfers the pupil's records to the requesting public agency.

34 CFR § 300.323(g)

Due Process Procedures

Opportunity To Examine Records and Parent Participation in Meetings. The parents of a child with a disability are afforded, in accordance with the policies in the "Confidentiality" section of this document, an opportunity to:

- inspect and review all education records with respect to the identification, evaluation, and educational placement of the child and the provision of a free appropriate public education to the child; and

- participate in meetings with respect to the identification, evaluation and educational placement of the child and the provision of a free appropriate public education to the child.

The 2r charter school notifies parents consistent with the policies in the *Parent Participation in IEP Team Meetings* section of these policies to ensure that parents of children with disabilities have the opportunity to participate in meetings described above. The term "meeting" in this policy does not include informal or unscheduled conversations involving agency personnel and conversations on issues such as teaching methodology, lesson plans, or coordination of service provision. A meeting also does not include preparatory activities that 2r charter school personnel engage in to develop a proposal or response to a parent proposal that will be discussed at a later meeting.

The parent of a child with a disability is a member of the group that makes decisions on the educational placement of their child. In implementing this policy, the 2r charter school uses procedures consistent with the policies described above. If neither parent can participate in a meeting in which a decision is to be made relating to the educational placement of their child, the 2r charter school uses other methods to ensure their participation including individual or conference telephone calls, or video conferencing. A placement decision may be made by the group without the involvement of the parent if the 2r charter school is unable to obtain the parent's participation in the decision. In this case, the 2r charter school must have a record of its attempt to ensure parent involvement.

CFR §§ 300.501, 300.322

Notice. The 2r charter school ensures a child's parents are provided prior written notice a reasonable time before it proposes to initiate or change, or refuses to initiate or change the identification, evaluation or educational placement of the child or the provision of a free appropriate public education to the child. The notice contains:

- a description of the action proposed or refused;

- an explanation of why the 2r charter school proposed or refused to take action;

- a statement that the parents of a child with a disability have protection under the procedural safeguards and, if this notice is not an initial referral for evaluation, the means by which a copy of a description of the procedural safeguards can be obtained;

- a description of any other options considered and the reason(s) they were rejected;

- a description of each evaluation procedure, assessment, record or report used as a basis for the proposed or refused action;

- a description of any other factors relevant to the proposal or refusal; and

- sources for parents to contact to obtain assistance in understanding special education law.

Each prior written notice is written in language understandable to the general public, in the parent's native language or other means of communication unless it is clearly not feasible to do so. If the native language or other mode of communication of the parent is not a written language, the 2r charter school takes steps to ensure the notice is translated orally or by other means to the parent in his or her native language or other mode of communication; the parent understands the content of the notice; and there is written evidence that these requirements have been met.

34 CFR § 300.503

Procedural Safeguards Notice. A copy of the procedural safeguards available to the parents of a child with a disability is given to the parents one time a school year, except that a copy is given to the parents:

- upon initial referral or parent request for evaluation;
- upon receipt of the first IDEA State complaint and the first due process complaint;
- on the date on which the decision is made to make a disciplinary removal that constitutes a change of placement;
- upon request by a parent.

The procedural safeguards notice includes a full explanation of the procedural safeguards available under special education law written so as to be easily understood by the general public and in the native language of the child's parents unless it is clearly not feasible to do so, relating to:

- independent educational evaluation;
- prior written notice;
- parental consent;
- access to educational records;
- opportunity to present and resolve complaints through the due process complaint and State IDEA complaint procedures, including:

  - ➢ the time period in which to file a complaint;
  - ➢ the opportunity for the agency to resolve the complaint; and
  - ➢ the difference between the due process complaint and the State complaint procedures, including the jurisdiction of each procedure, what issues may be raised, filing and decisional timelines, and relevant procedures.

- the child's placement during pendency of due process proceedings;
- procedures for pupils who are subject to placement in interim alternative educational settings under 20 USC § 1415(k);
- requirements for the unilateral placement by parents of pupils in private schools at public expense;
- availability of mediation;
- due process hearings including requirements for disclosure of evaluation results and recommendations;

- civil actions, including the time period in which to file those actions; and
- attorney fees.

34 CFR § 300.504

Independent Educational Evaluations. A parent may obtain an independent educational evaluation of his or her child. If a parent requests information from the 2r charter school about an independent evaluation, the 2r charter school provides the parent with information about where an independent evaluation may be obtained and the agency criteria applicable for independent educational evaluations. A parent has the right to an independent educational evaluation at public expense if the parent disagrees with an evaluation obtained by the 2r charter school. "Public expense" means the 2r charter school either pays for the full cost of the evaluation or ensures the evaluation is otherwise provided at no cost to the parent.

If a parent requests an independent educational evaluation at public expense, the 2r charter school, without unnecessary delay, either initiates a due process hearing to show its evaluation is appropriate or ensures an independent educational evaluation is provided at public expense unless the 2r charter school demonstrates in a due process hearing that the evaluation obtained by the parent did not meet 2r charter school criteria.

If a parent requests an independent educational evaluation, the 2r charter school may ask for the parent's reason why he or she objects to the public evaluation. However, the 2r charter school does not require the explanation and does not unreasonably delay either providing the independent educational evaluation at public expense or initiating a due process hearing to defend the public evaluation. A parent is entitled to only one independent educational evaluation at public expense each time the 2r charter school conducts an evaluation with which the parent disagrees.

If the 2r charter school initiates a hearing and the final decision is that the 2r charter school's evaluation is appropriate, the parent still has the right to an independent educational evaluation but not at public expense. If the parent obtains an independent educational evaluation at public expense or shares with the 2r charter school an evaluation obtained at private expense, the results of the evaluation must be considered by the 2r charter school, if it meets agency criteria, in any decision made with respect to the provision of FAPE to the child.

If a hearing officer requests an independent educational evaluation as part of a hearing, the cost of the evaluation must be at public expense. When an independent educational evaluation is at public expense, the criteria under which the evaluation is obtained, including the location of the evaluation and the qualifications of the examiner, is the same as the criteria that the 2r charter school uses when it initiates an evaluation to the extent that those criteria are consistent with the parent's right to an independent educational evaluation. Except for the criteria described above, the 2r charter school does not impose conditions or timelines related to obtaining and independent educational evaluation at public expense.

34 CFR § 300.502

Surrogate Parents. The 2r charter school ensures the rights of a child are protected if no parent can be identified; the 2r charter school, after reasonable efforts, cannot locate a parent; the child is a ward of the State; or the child is an unaccompanied homeless youth as defined in the McKinney-Vento Homeless Assistance Act. In such instances, the 2r charter school assigns an individual to act as a surrogate for the parents. The 2r charter school has a method for determining whether a child needs a surrogate parent and for assigning a surrogate parent to the child. In the case of a child who is a ward of the State, the surrogate parent may be appointed by the judge overseeing the child's case.

The 2r charter school ensures that a person selected as a surrogate parent is not an employee of the Department of Public Instruction, the 2r charter school, or any other agency that is involved in the education or care of the child; has no personal or professional interest that conflicts with the interest of the child he or she represents; and has knowledge and skills that ensure adequate representation of the child. A person who otherwise qualifies to be a surrogate parent is not an employee of the 2r charter school solely because he or she is paid by the 2r charter school to serve as a surrogate parent.

For an unaccompanied homeless youth, appropriate staff of emergency shelters, transitional shelters, independent living programs, and street outreach programs may be appointed as temporary surrogate parents until a surrogate parent can be appointed that meets all of the requirements for selection of surrogate parents.

The surrogate parent may represent the child in all matters relating to the identification, evaluation, and educational placement of the child and the provision of FAPE to the child.

The 2r charter school makes reasonable efforts to ensure the assignment of a surrogate parent not more than 30 days after it determines that one is needed.

34 CFR § 300.519

Mediation. When a 2r charter school participates in a mediation under the Wisconsin Special Education Mediation System, the 2r charter school:

- keeps discussion that occurs during mediation confidential;
- does not use discussion that occurs during mediation as evidence in any subsequent hearing or civil proceeding;
- does not record a mediation session unless both parties and the mediation agree;
- may be represented by two individuals, unless the parties agree to additional representatives;
- may withdraw from mediation at any time;
- may recess a mediation session to consult advisors, whether or not present, or to consult privately with the mediator;
- assumes responsibility with the parents for additional compensation if the parties agree that the amount of the mediator's compensation should be greater than the Wisconsin Special Education Mediation System schedule allows; and

- assumes responsibility with the parents for the compensation of a mediator who is not on the mediation system roster.

If the parties resolve the dispute or a portion of the dispute through the mediation process, the parties must execute a legally binding agreement. The agreement is reduced to writing, signed by the parties, and a copy is given to each party. The agreement states that all discussions that occurred during mediation are confidential and may not be used as evidence in any hearing or civil proceeding. The agreement is legally binding upon the parties and is enforceable in circuit court or in a district court of the United States. The agreement is signed by a representative of the 2r charter school who has the authority to bind the 2r charter school.

The Wisconsin Mediation System is voluntary on the part of the parties and the local educational agency does not use it to deny or delay a parent's right to a hearing on the parent's due process complaint, or to deny any other rights afforded under special education law.

34 CFR § 300.506, Wis. Stat. § 115.797

Due Process Hearings. When the 2r charter school files a request for a due process hearing, it will provide a copy of the hearing request to the other party, a copy to the Department of Public Instruction and will keep the hearing request confidential.

If the parent or the child's attorney files a written request for a due process hearing, the 2r charter school will:

- inform the parent of any free or low cost legal and other relevant services available in the area;

- (unless it has previously sent a written notice to the parent regarding the item in dispute) within 10 days of receiving the hearing request, provide a written response that includes an explanation of why the agency proposed or refused to take the action raised in the hearing request; a description of other options that the IEP team considered and the reasons why those options were rejected; a description of each evaluation procedure, assessment, record, or report the 2r charter school used as the basis for the proposed or refused action; and, a description of the other factors that are relevant to the agency's proposed or refused action;

- within 10 days of receiving the request, send a written response that addresses the issues raised in the hearing request; and

- (except when the parents and 2r charter school agree in writing to waive a resolution meeting or use mediation) within 15 days of receiving the request and before the hearing is conducted, convene a resolution meeting with the child's parents, a representative of the 2r charter school who is authorized to make decisions on behalf of the agency, and the relevant member(s) of the IEP team who have specific knowledge of the facts identified in the hearing request as determined by the parent and the agency. If the meeting resolves any subject matter of the hearing request, the parents and the 2r charter school will execute and

sign a legally binding agreement. The agreement is enforceable in any state court or in a district court of the United States.

When the 2r charter school is a party to a due process hearing under Wis. Stat. § 115.80, the 2r charter school:

- pays for the cost of the hearing;

- pays for the cost of an independent educational evaluation ordered by the hearing officer;

- discloses to all other parties, at least five business days before a hearing is conducted (other than an expedited hearing under the provisions of the Individuals with Disabilities Education Act), all evaluations completed by that date and recommendations based upon the 2r charter school evaluations that the 2r charter school intends to use at the hearing; and

- except as provided in the "discipline" section of the 2r charter school policies, the 2r charter school does not change the educational placement of a child during the pendency of a hearing or judicial proceedings unless the child's parents agree to the change. If the child is applying for initial admission to a public school, the child, with the consent of the parents, is placed in the public school program until all due process proceedings have been completed.

Before filing a civil action under any federal law seeking relief that is also available under special education law, the 2r charter school exhausts the due process hearing procedures to the same extent as would be required had the action been brought under special education law .

34 CFR §§ 300.502(e), 300.507, 300.508, 300.510, 300.512 and 300.518 Wis. Stat. § 115.80

Transfer of Rights at Age of Majority. When a child with a disability reaches the age of 18, unless he or she has been determined to be incompetent as defined by state law, the 2r charter school transfers the rights of parents under the Individuals with Disabilities Education Act to the individual pupil. The 2r charter school provides any required notices to both the parents and the adult pupil. The 2r charter school notifies both the parents and the individual pupil of the transfer of rights.

34 CFR § 300.520

Discipline Procedures

Authority of School Personnel. School personnel consider any unique circumstances on a case-by-case basis when determining whether a change in placement, consistent with the discipline procedures of the Individuals with Disabilities Education Act, is appropriate for a child with a disability who violates a code of school conduct.

School personnel are authorized to remove a child with a disability who violates a code of student conduct from the child's current placement to an appropriate interim alternative educational setting

(IEAS), another setting, or suspension for not more than ten consecutive school days (to the extent those alternatives are applied to children without disabilities) consistent with state requirements relating to the suspension of pupils.

A child with a disability may be suspended for more than ten consecutive school days only if the conduct is not a manifestation of the child's disability and the requirements provided below are followed.

School personnel are authorized to remove a child with a disability for additional removals of not more than ten consecutive school days in that same school year for separate incidents of misconduct (as long as those removals do not constitute a change of placement).

If a child with a disability has been removed from his or her placement for 10 school days or less, the 2r charter school provides services to the child if the 2r charter school also provides services to children without disabilities who have been similarly removed.

For purposes of removals of a child with a disability from the child's current educational placement, a change of placement occurs if the removal is for more than ten consecutive school days or the child is subjected to a series of removals that constitute a pattern because,

- the series of removals total more than ten school days in a school year;
- the child's behavior is substantially similar to the child's behavior in previous incidents that resulted in the series of removals; and
- such additional factors as the length of each removal, the total amount of time the child is removed and the proximity of the removals to one another.

The 2r charter school determines on a case-by-case basis whether a pattern of removals constitutes a change of placement.

After a child with a disability has been removed from the current placement for ten school days in the same school year during any subsequent days of removal the 2r charter school provides services so as to enable the child to continue to participate in the general education curriculum, although in another setting, and to progress toward meeting the goals set out in the child's IEP.

If the current removal is for not more than 10 consecutive school days and is not a change of placement, school personnel, in consultation with at least one of the child's teachers, determine the appropriate services.

The 2r charter school applies the relevant disciplinary procedures for children without disabilities to a child with a disability only if, as a result of the manifestation determination review, the 2r charter school determines the behavior of the child was not a manifestation of the child's disability. The 2r charter school applies the relevant disciplinary procedures in the same manner in which they would be applied to children without disabilities.

A child with a disability whose behavior is determined not to be a manifestation of the child's disability continues to be provided education services so as to enable the child to continue to

participate in the general education curriculum, although in another setting, and to progress toward meeting the goals set out in the child's IEP.

34 CFR §§ 300.530; 300.536

Placement in Interim Alternative Educational Settings. School personnel are authorized to remove a child with a disability to an interim alternative educational setting for not more than 45 school days without regard to whether the behavior is determined to be a manifestation of the child's disability if:

- the child carries a weapon to or possesses a weapon at school, on school premises, or to or at a school function under the jurisdiction of the state or a local educational agency;
- the child knowingly possesses or uses illegal drugs, or sells or solicits the sale of a controlled substance, while at school, on school premises, or at a school function under the jurisdiction of the state or a local educational agency; or
- the child has inflicted serious bodily injury upon another person while at school, on school premises, or at a school function under the jurisdiction of the state or a local educational agency.

34 CFR § 300.530(g)

The IEP team determines the interim alternative educational setting and the appropriate services to be provided. A child placed in an interim alternative educational setting:

- continues to receive educational services to enable the child to continue to participate in the general curriculum, although in another setting, and to progress toward meeting the goals set out in the child's IEP; and

- if the behavior is not a manifestation of the child's disability, receives, as appropriate, a functional behavioral assessment, and behavioral intervention services and modifications, that are designed to address the behavior violation so that it does not recur;

- if the behavior is a manifestation of the child's disability, the child receives either:

  ➢ a functional behavior assessment, unless the 2r charter school had conducted a functional behavioral assessment before the behavior that resulted in the change of placement occurred, and implemented a behavioral intervention plan, or
  ➢ if a behavioral intervention plan already has been developed, reviews the behavioral intervention plan, and modifies it, as necessary, to address the behavior.

34 CFR §§ 300.530, 300.531

On the date on which the decision is made to place the child in an interim alternative educational setting or to make a removal that constitutes a change of placement for violating a code of conduct, the 2r charter school notifies the parents of that decision and provides the parents a procedural safeguards notice.

34 CFR § 300.530(h)

When the 2r charter school determines that maintaining the current placement of a child with a disability is substantially likely to result in injury to the child or others, the agency may request an expedited due process hearing to change the child's placement to an appropriate interim alternative educational setting for not more than 45 school days. The request for a due process hearing may be repeated if the 2r charter school believes that returning the child to the original placement is substantially likely to result in injury to the child or others.

34 CFR § 300.532

Manifestation Determination Reviews.

Within 10 school days of any decision to change the placement of a child with a disability because of a violation of a code of student conduct, the, 2r charter school the parent, and relevant members of the child's IEP team (as determined by the parent and the 2r charter school):

- review all relevant information in the student's file, including the child's IEP;
- any teacher observations; and
- any relevant information provided by the parents.

The conduct is determined to be a manifestation of the child's disability if the 2r charter school, the parent, and relevant members of the child's IEP team determine that either:

- the conduct in question was caused by, or had a direct and substantial relationship to, the child's disability; or
- the conduct in question was the direct result of the 2r charter school's failure to implement the IEP.

If the 2r charter school, the parent, and relevant members of the child's IEP team determine the conduct in question was the direct result of the 2r charter school's failure to implement the IEP, the 2r charter school takes immediate steps to remedy those deficiencies.

If the conduct was a manifestation of the child's disability, the IEP team returns the child to the placement from which the child was removed, unless the child has been placed in an interim alternative educational setting, or the parent and 2r charter school agree to a change of placement as part of the modification of the behavioral intervention plan, and either:

- conducts a functional behavioral assessment, unless the 2r charter school had conducted a functional behavioral assessment before the behavior that resulted in the change of placement occurred, and implements a behavioral intervention plan for the child; or
- if a behavioral intervention plan already has been developed, the IEP team reviews the behavioral intervention plan, and modifies it, as necessary, to address the behavior.

If the conduct was not a manifestation of the child's disability, the child receives, as appropriate:

- a functional behavioral assessment and behavioral intervention services and modifications that are designed to address the behavior violation so that it does not recur; and
- educational services so as to enable the child to continue to participate in the general education curriculum, although in another setting, and to progress toward meeting the goals set out in the child's IEP.

CFR § 300.530(d)(e) and (f)

Placement During Appeals.

The parent of a child with a disability who disagrees with any decision regarding a disciplinary change in placement or a manifestation determination, or the 2r charter school believes that maintaining the current placement is substantially likely to result in injury to the child or others may appeal the decision by requesting a hearing. During such appeal, the child will remain in the placement to which the child was removed pending the decision of the hearing officer or until the expiration of the disciplinary placement, whichever occurs first. The parent and the 2r charter school may agree to a different placement during the appeal.

Unless 2r charter school and the parents agree in writing to waive the resolution meeting or agree to use the mediation process, the 2r charter school conducts a resolution meeting within seven days of receiving notice of the parent's due process complaint.

34 CFR §§ 300.532; 300.533

Protections for Children Not Yet Eligible For Special Education and Related Services.
The 2r charter school provides the protections asserted for a child under the Individuals with Disabilities Education Act-Part B to a child who has not been determined to be eligible for special education and related services and who has engaged in behavior that violated a code of conduct of the 2r charter school if the 2r charter school had knowledge (as determined in accordance with the provisions below) that the child was a child with a disability before the behavior that precipitated the disciplinary action occurred.

The 2r charter school has knowledge that a child is a child with a disability if before the behavior that precipitated the disciplinary action occurred:

- the parent of the child expressed concern in writing to supervisory or administrative personnel of the 2r charter school, or a teacher of the child, that the child is in need of special education and related services;

- the parent of the child requested a special education evaluation of the child; or

- the teacher of the child, or other personnel of the 2r charter school, expressed specific concerns about a pattern of behavior demonstrated by the child directly to the director of special education of the school or to other supervisory personnel of the school.

The 2r charter school does not have knowledge that a child is a child with a disability if:

- the parent of the child has not allowed an special education evaluation of the child or has refused special education services; or

- the 2r charter school conducted an evaluation and determined that the child was not a child with a disability.

If the 2r charter school does not have knowledge that a child is a child with a disability prior to taking disciplinary measures against the child, the 2r charter school may subject the child to the same disciplinary measures as measures applied to children without disabilities who engaged in comparable behaviors.

34 CFR § 300.534

If a request is made for an evaluation of a child during the time period in which the child is subjected to disciplinary measures, the evaluation is conducted in an expedited manner. Until the evaluation is completed, the 2r charter school maintains the child in the educational placement determined by school authorities, which can include suspension or expulsion without educational services.

If the child is determined to be a child with a disability, taking into consideration information from the 2r charter school's evaluation and information provided by the parents, the 2r charter school provides special education and related services in accordance with the Individuals with Disabilities Education Act-Part B and applicable state law, including legal requirements relating to discipline and the provision of a free appropriate public education to children with disabilities.

34 CFR § 300.534

When the 2r charter school reports a crime committed by a child with a disability, it ensures copies of the child's special education and disciplinary records are transmitted for consideration by the appropriate authorities to whom it reports the crime. The 2r charter school transmits copies of the child's special education and disciplinary records only to the extent that the Family Educational Rights and Privacy Act permit transmission.

34 CFR § 300.535

Confidentiality of Information

Notice to Parents. The 2r charter school notifies parents before any major child identification, location or evaluation activity. The notice is published or announced in newspapers or other media, or both, with circulation adequate to notify parents of children attending the 2r charter school of the activity.

34 CFR § 300.612(b)

The 2r charter school gives notice that is adequate to fully inform parents about the confidentiality of personally-identifiable information requirements in the law, including:

- a description of the extent that the notice is given in the native languages of the various population groups in the 2r charter school:

- a description of the children on whom personally-identifiable information is maintained, the types of information sought, the methods the 2r charter school intends to use in gathering the information (including the sources from whom information is gathered), and the uses to be made of the information;

- a summary of the policies and procedures that 2r charter school follow regarding storage, disclosure to third parties, retention, and destruction of personally-identifiable information; and

- a description of all of the rights of parents and children regarding this information, including the rights under the Family Educational Rights and Privacy Act of 1974 and the implementing regulations.

34 CFR § 300.612(a)

Access Rights. The 2r charter school permits parents to inspect and review any education records relating to their children that are collected, maintained or used by the school under the Individuals with Disabilities Education Act-Part B. The 2r charter school complies with a request without unnecessary delay and before any meeting regarding an IEP, or any due process hearing or resolution session, and in no case more than 45 days after the request has been made.

The right to inspect and review education records includes:

- the right to a response from the 2r charter school to reasonable requests for explanations and interpretations of the records;
- the right to have copies of the records upon request; and
- the right to have a representative of the parent inspect and review the records.

The 2r charter school presumes that the parent has authority to inspect and review records relating to his or her child unless the 2r charter school has been advised that the parent does not have authority under state law.

34 CFR § 300.613

The 2r charter school keeps a record of parties obtaining access to education records collected, maintained or used under the Individuals with Disabilities Education Act (except access by parents and authorized employees of the 2r charter school), including the name of the party, the date access was given and the purpose for which the party is authorized to use the records.

34 CFR § 300.614

The 2r charter school provides parents on request a list of the types and locations of education records collected, maintained or used by the school. If any education record includes information

on more than one child, the parents of those children have the right to inspect and review only the information relating to their child or to be informed of that specific information.

34 CFR §§ 300.615, 300.616

The 2r charter school does not charge a fee for copies of records that are made for parents if the fee effectively prevents the parents from exercising their right to inspect and review those records. The 2r charter school does not charge a fee to search for or to retrieve information in educational records.

34 CFR § 300.617

Amendment of Records at Parent's Request. A parent who believes information in the education records collected, maintained or used under the Individuals with Disabilities Education Act is inaccurate or misleading or violates the privacy or other rights of the child may request the 2r charter school to amend the information. The 2r charter school decides whether to amend the information in accordance with the request within a reasonable period of time of receipt of the request. If the 2r charter school decides to refuse to amend the information in accordance with the request, it informs the parent of the refusal and advises the parent of the right to an educational records hearing.

34 CFR § 300.618

The 2r charter school, on request, provides an opportunity for a hearing to challenge information in education records to ensure it is not inaccurate, misleading or otherwise in violation of the privacy or other rights of the child.

34 CFR § 300.619

The hearing is conducted according to the procedures described in the Family Educational Rights and Privacy Act implementing regulations. If, as a result of the hearing, the 2r charter school decides the information is inaccurate, misleading or otherwise in violation of the privacy or other rights of the child, it amends the information accordingly and so informs the parent in writing. If, as a result of the hearing, the 2r charter school decides the information is not inaccurate, misleading or otherwise in violation of the privacy or other rights of the child, it informs the parent of the right to place in the records it maintains on the child a statement commenting on the information or setting forth any reasons for disagreeing with the decision of the 2r charter school.

34 CFR §§ 300.619-621

Any explanation placed in the records of the child is maintained as part of the records of the child as long as the record or contested portion is maintained. If the records of the child or the contested portion are disclosed to any party, the explanation is also disclosed to the party.

34 CFR § 300.620(c)(2)

Consent. Parental consent is obtained before personally-identifiable information is disclosed, unless the disclosure is authorized without parental consent under the Family Educational Rights

and Privacy Act, 34 CFR § 99. Parental consent is not required before personally-identifiable information is released to officials of participating agencies for purposes of meeting a requirement of the Individuals with Disabilities Education Act with the following exception:

- Parental consent or the consent of an eligible child who has reached the age of majority under state law, is obtained before personally-identifiable information is released to officials of participating agencies providing or paying for transition services.

34 CFR § 300.622

Safeguards. The 2r charter school protects the confidentiality of personally-identifiable information at collection, storage, disclosure and destruction stages. One official at the 2r charter school assumes responsibility for ensuring the confidentiality of any personally-identifiable information. All persons collecting or using personally-identifiable information receive training or instruction regarding the state's policies, and procedures described in the regulations implementing the Individuals with Disabilities Education Act and the Family Educational Rights and Privacy Act. The 2r charter school maintains, for public inspection, a current listing of the names and positions of those employees within the school who may have access to personally-identifiable information.

34 CFR § 300.623

Destruction of Information. The 2r charter school informs parents when personally-identifiable information collected, maintained or used under the Individuals with Disabilities Education Act is no longer needed to provide educational services to the child. The information is destroyed at the request of the parents. However, a permanent record of the student's name, address, and phone number, his or her grades, attendance record, classes attended, grade level completed, and year completed may be maintained without time limitation.

34 CFR § 300.624

Transfer of Confidentiality Rights at Age of Majority. Under the regulations for the Family Educational Rights and Privacy Act, the rights of parents regarding education records are transferred to the student at age 18. When the rights accorded to parents under the Individuals with Disabilities Education Act are transferred to a student who reaches the age of majority, the rights regarding educational records in the Individuals with Disabilities Education Act also transfer to the student. However, the 2r charter school provides any notice required under the Individuals with Disabilities Education Act to the student and the parents.

34 CFR § 300.625(b) and (c)

Parentally Placed Children in Private Schools When FAPE is At Issue

The 2r charter school is not required to pay for the cost of education, including special education and related services, of a child with a disability at a private school or facility if the 2r charter school made FAPE available to the child and the parents elected to place the child in a private school or facility. The child is then considered a parentally placed private school child with a disability.

34 CFR § 300.148

Children with Disabilities in Private Schools Placed or Referred by the 2r Charter School

When, pursuant to an IEP, a child with a disability is or has been placed in or referred to a private school or facility by the 2r charter school as a means of providing special education and related services, the 2r charter school ensures that the child:

- is provided special education and related services in conformance with an IEP that meets the requirements of the law and at no cost to the parents;
- is provided an education that meets the standards that apply to education provided by the Department of Public Instruction and local educational agencies including the requirements of Individuals with Disabilities Education Act, except that staff are not required to meet the highly qualified teacher requirements; and
- has all of the rights of a child with a disability who is served by a public agency.

34 CFR § 300.146

Development, review, and revision of the IEP. Before the 2r charter school places a child with a disability in, or refers a child to, a private school or facility, the 2r charter school initiates and conducts a meeting to develop an IEP for the child in accordance with the law. The 2r charter school ensures a representative of the private school or facility attends the meeting. If the representative cannot attend, the 2r charter school uses other methods to ensure participation by the private school or facility, including individual or conference telephone calls.

After a child with a disability enters a private school or facility, any meetings to review and revise the child's IEP may be initiated and conducted by the private school or facility at the discretion of the 2r charter school. If the 2r charter school permits a private school or facility to initiate and conduct meetings to review and revise IEPs, the 2r charter school ensures the parents and a 2r charter school representative are involved in any decisions about the IEP and agree to any proposed changes in the IEP before those changes are implemented. Even if a private school or facility implements a child's IEP, the 2r charter school retains responsibility for compliance with the requirements of special education law.

34 CFR § 300.325

2r Charter School Reporting to State

The 2r charter school in providing for the education of children with disabilities enrolled in its school has established and implemented policies, procedures and programs that are consistent with federal special education requirements policies and procedures, and applicable state requirements, policies and procedures. The 2r charter school will modify them to the extent necessary to ensure compliance with the law if the provisions of federal or applicable state laws or regulations are amended, if there is a new interpretation of Individuals with Disabilities Education Act by federal or state courts or if there is an official finding of noncompliance with federal or applicable state law or regulations.

34 CFR § 300.201

The 2r charter school files with the Department of Public Instruction information to demonstrate all personnel necessary to carry out the requirements of federal and applicable state special education law are appropriately and adequately prepared, subject to the requirements of the personnel requirements of the Individuals with Disabilities Education Act and the Elementary and Secondary Education Act.

34 CFR § 300.207

The 2r charter school provides to the Department of Public Instruction information needed for the Department to meet its responsibilities under the IDEA and applicable state laws, including information related to the performance of children with disabilities participating in 2r charter school special education programs.

34 CFR § 300.211

The 2r charter school reports its plan for providing special education and related services to children with disabilities to the Department of Public Instruction on a schedule and using instructions provided by the Department of Public Instruction. The plan includes:

- statements of assurance as required by applicable federal law;

- assurances that the 2r charter school in providing for the children with disabilities enrolled in its school, has in effect policies, procedures, and programs that are consistent with the IDEA and applicable state law;

- the 2r charter school's plan for ensuring that all personnel necessary to carry out the requirements of the IDEA are appropriately and adequately prepared according to federal law and applicable state law;

- the data regarding children with disabilities and nondisabled children enrolled in the 2r charter school that the Department of Public Instruction is required to collect or report to be in compliance with 20 USC 1400 to 1482; and

- any other information the Department of Public Instruction requires to permit its review of the plan.

34 CFR §§ 300.200, 300.207, 300.209(c), 300.211

Appendix of Federal Law and Regulations
Referenced in the Model Policies and Procedures

34 CFR 99.3 - Family Educational Rights and Privacy Act of 1974 – Definition of Education Records

(a) The term means those records that are:
- (1)   Directly related to a student; and
- (2)   Maintained by an educational agency or institution or by a party acting for the agency or institution.

(b) The term does not include:
- (1)   Records that are kept in the sole possession of the maker, are used only as a personal memory aid, and are not accessible or revealed to any other person except a temporary substitute for the maker of the record.
- (2)   Records of the law enforcement unit of an educational agency or institution, subject to the provisions of Sec. 99.8.
- (3)   (i) Records relating to an individual who is employed by an educational agency or institution, that:

    (A) Are made and maintained in the normal course of business;

    (B) Relate exclusively to the individual in that individual's capacity as an employee; and

    (C) Are not available for use for any other purpose.

    (ii) Records relating to an individual in attendance at the agency or institution who is employed as a result of his or her status as a student are education records and not excepted under paragraph (b)(3)(i) of this definition.
- (4)   Records on a student who is 18 years of age or older, or is attending an institution of postsecondary education, that are:

    (i) Made or maintained by a physician, psychiatrist, psychologist, or other recognized professional or paraprofessional acting in his or her professional capacity or assisting in a paraprofessional capacity;

    (ii) Made, maintained, or used only in connection with treatment of the student; and

    (iii) Disclosed only to individuals providing the treatment. For the purpose of this definition, ``treatment'' does not include remedial educational activities or activities that are part of the program of instruction at the agency or institution; and
- (5)   Records that only contain information about an individual after he or she is no longer a student at that agency or institution.

42 USC 11434a – McKinney-Vento Homeless Assistance Act, Definition of Homeless Children

(2) The term "homeless children and youths"—
    (A) means individuals who lack a fixed, regular, and adequate nighttime residence (within the meaning of section 11302 (a)(1) of this title); and
    (B) includes—

        (i) children and youths who are sharing the housing of other persons due to loss of housing, economic hardship, or a similar reason; are living in motels, hotels, trailer parks, or camping grounds due to the lack of alternative adequate accommodations; are living in emergency or transitional shelters; are abandoned in hospitals; or are awaiting foster care placement;

        (ii) children and youths who have a primary nighttime residence that is a public or private place not designed for or ordinarily used as a regular sleeping accommodation for human beings (within the meaning of section 11302 (a)(2)(C) of this title);

        (iii) children and youths who are living in cars, parks, public spaces, abandoned buildings, substandard housing, bus or train stations, or similar settings; and

        (iv) migratory children (as such term is defined in section 6399 of title 20) who qualify as homeless for the purposes of this part because the children are living in circumstances described in clauses (i) through (iii).

18 USC 1365(h) – Definition of Serious Bodily Injury

(3) the term "serious bodily injury" means bodily injury which involves—
    (A) a substantial risk of death;
    (B) extreme physical pain;
    (C) protracted and obvious disfigurement; or
    (D) protracted loss or impairment of the function of a bodily member, organ, or   mental faculty; and

(4) the term "bodily injury" means—
    (A) a cut, abrasion, bruise, burn, or disfigurement;
    (B) physical pain;
    (C) illness;
    (D) impairment of the function of a bodily member, organ, or mental faculty; or
    (E) any other injury to the body, no matter how temporary.

29 USC 3002(19) - Definition of Universal Design

The term "universal design" means a concept or philosophy for designing and delivering products and services that are usable by people with the widest possible range of functional capabilities, which include products and services that are directly accessible (without requiring assistive technologies) and products and services that are interoperable with assistive technologies.

18 USC 930(g)(2) - Definition of Weapon

The term "dangerous weapon" means a weapon, device, instrument, material, or substance, animate or inanimate, that is used for, or is readily capable of, causing death or serious bodily injury, except that such term does not include a pocket knife with a blade of less than 2 1/2 inches in length.

20 USC 7801(37) – Definition of Scientifically Based Research

The term "scientifically based research"--

(A) means research that involves the application of rigorous, systematic, and objective procedures to obtain reliable and valid knowledge relevant to education activities and programs; and

(B) includes research that--

> (i) employs systematic, empirical methods that draw on observation or experiment;

> (ii) involves rigorous data analyses that are adequate to test the stated hypotheses and justify the general conclusions drawn;

> (iii) relies on measurements or observational methods that provide reliable and valid data across evaluators and observers, across multiple measurements and observations, and across studies by the same or different investigators;

> (iv) is evaluated using experimental or quasi-experimental designs in which individuals, entities, programs, or activities are assigned to different conditions and with appropriate controls to evaluate the effects of the condition of interest, with a preference for random-assignment experiments, or other designs to the extent that those designs contain within-condition or across-condition controls;

> (v) ensures that experimental studies are presented in sufficient detail and clarity to allow for replication or, at a minimum, offer the opportunity to build systematically on their findings; and

> (vi) has been accepted by a peer-reviewed journal or approved by a panel of independent experts through a comparably rigorous, objective, and scientific review.

EDGAR T. RUSSELL

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Milwaukee, WI 53222   edgarrussell@hotmail.com

QUALIFICATIONS

> 21 + years of experience in operations mgt. and organizational development
> 19 + years of experience in training development and management

PROFESSIONAL ACCOMPLISHMENTS

Education Management
- Developed educational approach and business plan for a network of high-productivity charter schools using blended and project-based learning
- Led staff of educators, counselors and professional development staff who provided consistently high quality educational services to over 100 private schools

Operations Management
- Managed over $10M in P&Ls for a 4 state region, while providing consistently high margins and growing revenue by more than 200% in 4 years.
- Negotiated contracts with training vendors, resulting in delivery of high-quality job training courses to over 300 welfare-to-work and under employed participants
- Directed training center staff of 17 in promoting, selecting, and placing over 400 trainees in high quality employment-related training

Organizational Development & Training
- Developed improvements to employee suggestion process increasing supervisor processed suggestions from 3% to 25%, while improving support for employees
- Developed on-line referral process, reducing time to initiate and receive training referrals by 300%, while increasing accuracy and eliminating paper system
- Led training department staff of 11 trainers, educators and support personnel – providing an average of 50,000 hrs/year of highly effective training

Change Management
- Developed and implemented process for problem solving that produced 19 Kaizen workshops with improvements to 61 manufacturing and PC&L processes
- Coordinated capacity improvement project with Facilities, Engineering, Operations Departments, and union leadership that saved $2.1M, using 5S principles
- Managed $1.2M internal leadership assessment process using outside vendor resulting in significant improvements to Maintenance operations effectiveness

EDUCATION

1997   Master of Science – Organizational Leadership and Quality,
                Marian University, formerly Marian College, Fond du Lac, WI
                GPA 3.8
1996   Bachelors of Science – Quality and Productivity Management,
                Marian University, formerly Marian College, Fond du Lac, WI
                GPA 3.8 – Magna Cum Laude

COMMUNITY INVOLVEMENT

2009 – Present   Served as Congregational President of Mt. Calvary Lutheran Church
1996 – 2004   Chaired Board of Education at Mt. Calvary Lutheran School
2000   Contributed to ANSI Quality Standard Z1.11 (the training function

equivalent to ISO 9000)

2000   Presented to U.S. Dept of Labor conference on dislocated workers

CERTIFICATIONS AND ACCOMPLISHMENTS

Quality   Senior Fellow – American Society for Quality

Training   Certified General Motors Professional Manager of Training

OD   Certified - Human Resource Development Representative

Computers   20 years of experience in using Word & Excel. Deep experience with PowerPoint, Visio, Access & network design and administration.

EMPLOYMENT HISTORY

Currently   **Executive Director – Quest-Milwaukee at The Institute for The Transformation of Learning at Marquette University**
- Developed long range business plan
- Developing blended learning school model
- Developing charter application for a charter network

8/10 to 10/10   **External Consultant**
- Developed and executed of succession plan
- Supporting operational excellence & customer service

12/09 to 7/10   **Executive Director – Catapult Learning**
- Managed operations and business development for a 4 state region
- Served as member of the corporate Executive Team

1/06 to 12/09   **Regional Director – Catapult Learning**
- Managed operations in Milwaukee and Minneapolis offices
- Developed new business opportunities

9/04 to 1/06   **Quality Network Representative - Delphi Electronics & Safety**
- Developed and implemented processes for problem solving, increasing effectiveness of this continuous improvement activity
- Identified and validated improvement opportunities

1/04 to 9/04   **Project Coordinator - Delphi Electronics & Safety**
- Identified barriers and facilitated action plans to achieve project goals of increasing capacity without additional capital outlay
- Coordinated project logistics with strategic leadership committee for review, input, and alignment with strategic vision

9/02 to 1/04   **Operations (Section) Manager – YWCA of Greater Milwaukee**
- Determined market outlook for employment, negotiated contracts with training vendors, developed relationships with agencies
- Managed operations staff delivering services to agency's W2clients

1/02 to 9/02   **Technical Training Manager – Workforce Training Center (YWCA)**
- Developed, monitored, and improved systems and procedures for training dislocated, incumbent and new workers
- Developed links to job placement sites for interns and graduates of training center programs

2/89 to 1/02   **Training and Human Resource Development** — **Delphi Electronics**
- Assessed organizational readiness & assisted leadership in identifying organizational development goals
- Supported communications function by implementing reader data to improve content and style of internal publications
- Established long-range training objectives and training systems, resulting in improved delivery of instruction and ROI

3/01 to 10/02   **Consultant** - **Wisconsin Regional Training Partnership (part time)**
- Provided assistance with incumbent worker training grant & consulted on development of 3 learning centers

Long Range Business Plan

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Table of Contents

Growth Strategy

The Quest growth strategy is to develop and open each of our 3 schools with an incoming class of 6th and 7th grade students and to add one grade per year until each school is the capacity of 475 students. We will open our first school in 2013 and perfect the model for 2 years before opening our next school. The growth in students is summarized below, assuming a 10% combined rate of retention and attrition.

Network growth is also spread across three phases and is shown in Table 1.

Number to Serve/Impact	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21
Growth Phase	Phase 1		Phase 2		Phase 3				
# of Quest Schools	0	1	1	2	3	3	3	3	3
# of Students	0	180	252	497	805	995	1,165	1,271	1,371

Table 1. Network Growth Projection.

Market Niche

The Quest blended learning model facilitates a strong entry into an educational market place with few innovative competitors. When factoring in the project-based approach as an integrated learning strategy, we feel that Quest will be strongly differentiated from existing 'old model' schools. The Quest model is designed to move marketable skills into students' hands, based on their interest, from their first day of school. Therefore, potential Quest students will be attracted to the 21st Century tools we will provide, which will be recognized by students and their families for their relevancy to real-life skills.

Business structure

Quest is a non-stock Wisconsin corporation and operates as a project under the umbrella of the Institute for the Transformation of Learning (ITL) at Marquette University. The organization is staff by an Executive Director and is guided by a 3 member board of directors.

Quest will apply to the City of Milwaukee for a charter for School # 1 in February, 2012. In the spring of 2012, Quest will learn if its application for a charter has been approved. Quest will seek planning grants to fund further development of the model and to cover the salary of the Executive Director from March, 2012 through September, 2013.

Upon the successful funding of this Business Plan, the Board will be expanded from the current developmental board to a full board. The 1st School Director, who will also function as the Quest co-developer, will be hired to finalize the operational details for school #1. At this time, activities that make up the Growth Strategy will be accelerated.

Planning will then switch from a calendar year basis to a school year basis. The Growth Strategy has been organized into 3 different phases, each with a unique set of activities, tasks and outcomes. The CoS team structure for each phase of Quest's growth is displayed below.

Center of Support Team Structure

To help guide our thinking about the growth of Quest, we developed the matrix, detailed in Table 2. This matrix indicates the functional areas of responsibility and the corresponding staff members during each the 3 phases of growth. The matrix is intended to facilitate the creation of transition planning for each phase of the CoS growth and the professional development needed for incoming CoS staff members.

Process Areas	Phase 1		Phase 2		Phase 3
1.0 Strategic Planning	ED		ED		ED
2.0 Develop Assess Curriculum	SD & ED-C		SD & DSS		SD & DSS
3.0 Support Processes	SD & ED-C		SD & DSS		SD & DSS
4.0 Operations	SD & ED		SD & DMS		SD & DMS
5.0 Stakeholder Relations	ED		DSS		DD
6.0 Human Capital	ED-C		DMS-C		DHC
7.0 Information Technology	ED-C		DIT		DMS-C
8.0 Finance	ED-C		DMS-C		DF
9.0 Facilities	ED		DMS		DF
10.0 Health & Safety	ED		DMS		DMS
11.0 Government Affairs	ED		DSS		DHC
12.0 Knowledge Management	ED		ED		DD

Table 2. Responsibility-Growth Matrix

Position Key

-C = with the support of an external consultant	
ED = Executive Director	**DHC** = Director of Human Capital
SD = School Directors (3)	**DF** = Director of Financial Services
DMS = Director of Management Services	**DD** = Director of Development
DSS = Director of School Services	**DIT** = Director of Information Technology

The global responsibilities of the CoS and the functional processes supported through the CoS will remain consistent. As new CoS team members are brought on, the existing responsibilities will be transitioned to them. To ensure that network functions are properly executed during the early stage of growth, the CoS team will need access to consultants to assist with:

- Development Consultant for Stakeholder Relations (SY 2013 through SY 2017)
- Human Capital Consultant for recruitment and HR work(SY 2013 through SY 2016)
- Information Technology (SY 2013)
- Finance (SY 2014 through SY 2015)

Network Growth - Phase 1

Early in Phase 1, the primary staff member will be the Executive Director (ED) and the School Director for Quest School #1 (the network co-developer). The ED will contract with consultants to accomplish some of the identified CoS tasks. It is anticipated that many of these tasks will have to do with

documenting and integrating new processes, as outlined above. Later in this document, we provide a detailed task list, laying out activities and responsibilities for Quest from October, 2011 until September, 2013, when the first school opens.

During the 2013-14 school year, we will start the first school with 180 students and then add 72 in the 2014-15 school year. At that time, we have performance data from our first school that we will analyze and include as part of our application to the City of Milwaukee's Common Council for charters to open 2 additional schools. An interning School Director for SY 2015-16 will be hired and begin executing the New Schools Protocol (refer to the Quest Business Plan).

Figure 1. Phase 1 Structure.

Green Light Procedure

Prior to opening our 2nd school, we will assess several criteria. If these criteria are met, the Quest Board will give the Executive Director the 'green light' to go Phase 2 of our growth strategy. These criteria include, but are not limited to:

- Have we secured a school director?
- Have we secured a solid building in which to place our next school?
- Have we met at least 70% of our authorizers metrics (or are there enough metrics solidly trending upwards to demonstrate our models long-term efficacy)?

Phase 2 – Network Growth

If the green light is given, Quest will open its second school in 2015-16 and complete the growth of our first school. Quest will then hire 3 directors for the CoS and the staff will consist of: the Executive Director, the Director of School Services, the Director
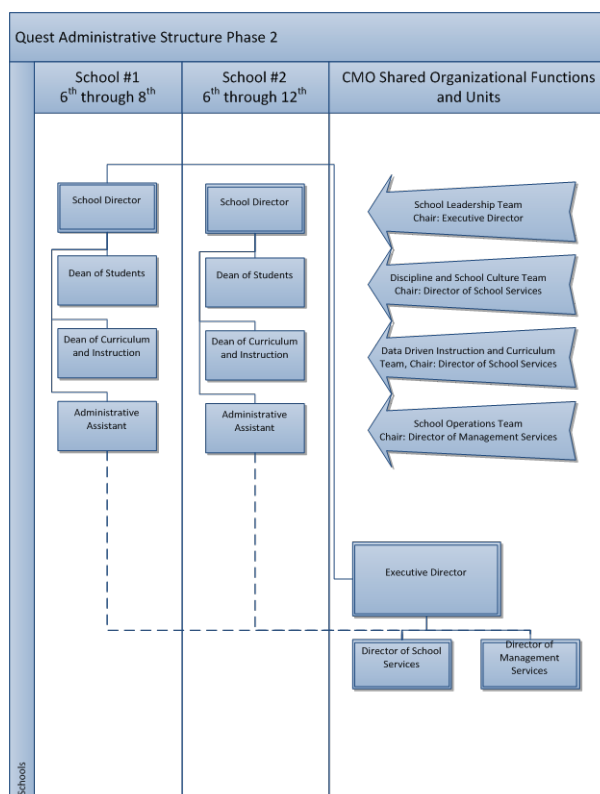
Figure 2. Phase 2 Structure.

of Management Services, and the Director of IT.

The Quest Improvement teams will also be initiated and provide additional fine-tuning and improvements to the model. These teams, although chaired by CoS personnel will be focused on servicing operational needs of each school. The team chairs will function as facilitators, to help drive overall communication and continuous improvement efforts. The teams are structured to accelerate Quest's organizational learning from our first school and to develop bench strength in specific competencies.

Phase 3 – Network Growth

During Phase 3 the size of the CoS growth will peak. The Directors of Human Capital, Finance and Development will be hired.

As Quest grows, the duties of the startup staff will need to shift. All work previously performed by consultants will be transitioned to CoS staff. At this point, the staffing model and structure will shift to that detailed in Figure 3.

It is anticipated that the staff will have refined the documented processes and have made improvements in these processes. These improvements in efficiencies should help the Quest CoS reduce overall costs in the long run and share those savings with the schools it serves.

Quest Administrative Structure Phase 3

School #1 6th through 12th	School #2 6th through 12th	School #3 6th through 12th	CMO Shared Organizational Functions and Units

School Director — School Director — School Director

Dean of Students — Dean of Students — Dean of Students

Curriculum Coach — Curriculum Coach — Curriculum Coach

Administrative Assistant — Administrative Assistant — Administrative Assistant

School Leadership Team
Chair: Executive Director

Discipline and School Culture Team
Chair: Director of School Services

Data Driven Instruction and Curriculum Team, Chair: Director of School Services

School Operations Team
Chair: Director of Management Services

Executive Director

Director of School Services — Director of Mgt Services

Director of Human Capital — Director of Finance

Director of Development — Director of IT

Schools

Figure 3. Phase 3 Structure.

Quest Resource Requirements

Financial Assumptions

The following assumptions are contained in the financial model.

- State per Pupil Funding will remain at the current level of $7,775
- Quest will successfully apply for and receive 3 WFF Phase III Combination Start-up Grants (one for each school)
- Quest will successfully apply for and receive planning, implementation and dissemination grants from the state of Wisconsin Department of Public Instruction for each of our 3 schools.
- Facilities rental or lease costs will be $10/square foot or less
- Facilities energy cost will be $5/square foot or less
- Inflation rate will be 2.7% or less
- COLA will be 2.7% or less
- Health insurance cost to be 16% of salaries or less
- Dental Insurance costs to be 2% of salaries or less
- Employer Tax to be 9.5% of salaries or less

Financial Requirements

The long term financial goals for Quest include financial independence from startup-funding. Many CMO's have this as a goal. Quest has built this into the financial plan to be accomplished by the 6th year of operation. The Financial Appendix includes an in-depth presentation of the Quest financials and contains the documents shown in **Error! Reference source not found.**.

Human Capital Requirements

Center of Support

The Quest Human Capital needs are detailed in Table 3, by school year. For essential functions, contractors are retained until sufficient student count is achieved. At that point, those positions will be transitioned to new employees.

Number of CoS Staff (FTEs)	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19
Employees	**Phase 1**		**Phase 2**		**Phase 3**		
Executive Director	1	1	1	1	1	1	1
School Director for year 2013-14	1						
Administrative Assistant		0.5	1	1	1	1	1
Director of Information Technology			1	1	1	1	1
School Director for year 2015-16			1				
Director of School Services				1	1	1	1
Director of Management Services				1	1	1	1
School Director for year 2016-17				1			
Director of Finances					1	1	1
Director of Human Capital					1	1	1
Director of Development						1	1
Consultants							
IT Consultant		0.5					
Development Manager / Grant Writer		0.25	0.25	0.25	0.25		
HR Consultant	0.5	0.5	0.5	0.5			
Finance Manager		0.25	0.25	0.5			
TOTAL Center of Support (FTEs)	**2.5**	**3.0**	**5.0**	**7.25**	**7.25**	**8**	**8**

Table 3. Human Capital Needs - CoS.

	13-14 Projected	14-15 Projected	15-16 Projected	16-17 Projected	17-18 Projected	18-19 Projected	19-20 Projected	20-21 Projected	21-22 Projected
School 1									
School Revenue	2,061,296	2,418,878	2,971,059	3,213,840	3,664,197	4,063,642	4,021,744	4,022,299	4,022,299
School Expenses	2,038,495	2,416,852	2,971,017	3,182,195	3,451,259	3,740,975	3,789,081	3,846,200	3,846,200
Net Operating Revenue	22,801	2,025	42	31,646	212,938	322,667	232,663	176,100	176,100
School 2									
School Revenue	0	0	2,061,296	2,418,878	2,971,059	3,213,840	3,664,197	4,063,642	4,021,744
School Expenses	0	0	2,060,972	2,396,551	2,970,964	3,181,612	3,469,423	3,762,466	3,796,977
Net Operating Revenue	0	0	323	22,327	96	32,229	194,774	301,176	224,767
School 3									
School Revenue	0	0	0	2,061,296	2,422,878	2,975,059	3,217,840	3,668,197	4,067,642
School Expenses	0	0	0	2,041,126	2,414,265	2,969,363	3,215,729	3,467,361	3,747,775
Net Operating Revenue	0	0	0	20,169	8,613	5,696	2,111	200,836	319,867
All School Revenues	2,061,296	2,418,878	5,032,355	7,694,014	9,058,134	10,252,541	10,903,782	11,754,138	12,111,685
All School Expenses	2,038,495	2,416,852	5,031,990	7,619,872	8,836,488	9,891,949	10,474,233	11,076,026	11,390,951
All School Net Revenues	22,801	2,025	365	74,142	221,646	360,592	429,549	678,112	720,734
Network Revenue from Tuition	1,399,500	1,959,300	3,864,175	6,274,425	7,751,675	9,073,425	9,897,575	10,675,075	11,001,625
Student Count									
School 1	180	252	317	375	428	475	470	470	470
School 2	0	0	180	252	317	375	428	475	470
School 3	0	0	0	180	252	317	375	428	475
	180	*252*	*497*	*807*	*997*	*1,167*	*1,273*	*1,373*	*1,415*

	12-13 Proj	13-14 Proj	14-15 Proj	15-16 Proj	16-17 Proj	17-18 Proj	18-19 Proj	19-20 Proj	20-21 Proj	21-22 Proj
School 1										
School Tax	0	202,928	284,099	357,378	422,766	482,517	535,503	529,866	529,866	529,866
School 2										
School Tax	0	0	0	202,928	284,099	357,378	422,766	482,517	535,503	529,866
School 3										
School Tax	0	0	0	0	202,928	284,099	357,378	422,766	482,517	535,503
Total School Taxes	**0**	**202,928**	**284,099**	**560,305**	**909,792**	**1,123,993**	**1,315,647**	**1,435,148**	**1,547,886**	**1,595,236**
CoS Expenses	449,765	473,034	771,408	1,023,921	1,010,622	1,116,356	1,143,885	1,171,962	1,200,808	1,230,444
Taxes - CoS Expenses	**(449,765)**	**(270,106)**	**(487,309)**	**(463,616)**	**(100,830)**	**7,637**	**171,762**	**263,186**	**347,078**	**364,792**
Restricted Donations	450,000	271,000	488,000	464,000	101,000	0	0	0	0	0
	235	**894**	**691**	**384**	**170**	**7,637**	**171,762**	**263,186**	**347,078**	**364,792**
Taxes + Donations - Expenses										
Per Pupil Expenses	**N/A**	**2,628**	**3,061**	**2,060**	**1,252**	**1,120**	**980**	**921**	**875**	**870**
Student Count										
School 1	*0*	*180*	*252*	*317*	*375*	*428*	*475*	*470*	*470*	*470*
School 2	*0*	*0*	*0*	*180*	*252*	*317*	*375*	*428*	*475*	*470*
School 3	*0*	*0*	*0*	*0*	*180*	*252*	*317*	*375*	*428*	*475*
	0	*180*	*252*	*497*	*807*	*997*	*1,167*	*1,273*	*1,373*	*1,415*

Quest-Milwauke 6th thru 12th Grade School
8 Year Projected Budget

		13-14 Proj Budget	14-15 Proj Budget	15-16 Proj Budget	16-17 Proj Budget	17-18 Proj Budget	18-19 Proj Budget	19-20 Proj Budget	20-21 Proj Budget	
Student Count		180	252	317	375	428	475	470	470	
Per Pupil Revenue Before Network Tax		7,775	7,775	7,775	7,775	7,775	7,775	7,775	7,775	
Per Pupil Revenue After Network Tax		6,648	6,648	6,648	6,648	6,648	6,648	6,648	6,648	
Ledger #	**Operating Revenues**									
041-400001	Tuition - State	$1,196,573	$1,675,202	$2,107,297	$2,492,859	$2,845,184	$3,157,622	$3,124,384	$3,124,384	1
041-400002	Lunch Revenue	$12,960	$18,144	$22,824	$27,000	$30,816	$34,200	$33,840	$33,840	8
041-400005	Lunch Program Reibursement	$116,640	$163,296	$205,416	$243,000	$277,344	$307,800	$304,560	$304,560	8
041-400010	Title I & II	$153,000	$214,200	$269,450	$318,750	$363,800	$403,750	$399,500	$399,500	2
041-400015	Special Education EE Reimburse	$17,523	$17,996	$18,482	$18,981	$19,494	$20,020	$20,560	$21,116	
041-400020	IDEA Flow Through	$48,600	$68,040	$85,590	$101,250	$115,560	$128,250	$126,900	$126,900	
041-400050	Uniforms	$8,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	
041-400100	Field Trips	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	
041-400101	Miscellaneous Income	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000	
041-500010	Restricted DPI Implementation Grant	$250,000	$250,000	$250,000	$0	$0	$0	$0	$0	
041-500011	Restricted Walton Grant	$250,000	$0	$0	$0	$0	$0	$0	$0	
041-500012	Donations	$0	$0	$0	$0	$0	$0	$0	$0	
041-500013	Donations - Restricted	$0	$0	$0	$0	$0	$0	$0	$0	
041-500014	Donations - Unrestricted	$0	$0	$0	$0	$0	$0	$0	$0	
	Net Operating Revenue	**$2,061,296**	**$2,418,878**	**$2,971,059**	**$3,213,840**	**$3,664,197**	**$4,063,642**	**$4,021,744**	**$4,022,299**	
	Operating Expense									
041-600000	Salary Expense	$630,000	$737,010	$1,118,541	$1,202,742	$1,320,216	$1,385,862	$1,423,280	$1,461,708	3
041-610010	Employer Tax Expense	$59,850	$70,016	$106,261	$114,260	$125,420	$131,657	$135,212	$138,862	6
041-610020	Health Insurance	$100,800	$117,922	$178,967	$192,439	$211,235	$221,738	$227,725	$233,873	6
041-610030	Dental Insurance	$12,600	$14,740	$22,371	$24,055	$26,404	$27,717	$28,466	$29,234	6
041-610040	Life Insurance	$6,300	$7,370	$11,185	$12,027	$13,202	$13,859	$14,233	$14,617	6
041-620010	Accountant/Audit Fees	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	
041-620050	Professional Development	$23,500	$23,500	$17,500	$17,500	$17,500	$17,500	$17,500	$17,500	4
041-620100	Consulting Expense	$5,000	$5,000	$5,000	$5,000	$5,000	$20,000	$20,000	$20,000	
041-620500	Outside Services - Restricted	$0	$0	$0	$0	$0	$0	$0	$0	
041-630010	Transportation	$15,000	$15,000	$15,000	$15,000	$15,000	$15,000	$15,000	$15,000	
041-640000	Property Taxes	$0	$0	$0	$0	$0	$0	$0	$0	
041-640010	Telephone	$9,500	$9,500	$9,500	$9,500	$9,500	$9,500	$9,500	$9,500	
041-640020	Cable	$3,700	$3,700	$3,700	$3,700	$3,700	$3,700	$3,700	$3,700	
041-650000	Copier Expense	$15,000	$15,000	$15,000	$15,000	$15,000	$15,000	$15,000	$15,000	
041-650020	Printing	$4,500	$4,500	$4,500	$4,500	$4,500	$4,500	$4,500	$4,500	
041-650030	Postage	$2,000	$4,000	$6,000	$6,000	$6,000	$6,000	$6,000	$6,000	
041-650050	Office Supplies	$5,000	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	
041-660010	Office/Classroom Furniture	$80,555	$77,431	$55,897	$46,103	$42,449	$38,775	$10,000	$10,000	7
041-660100	Computer Equipment	$55,700	$60,480	$76,080	$56,800	$52,240	$47,920	$32,800	$20,080	10
041-680010	Uniform Expense	$8,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	
041-680050	Technology Upgrades	$0	$2,500	$2,500	$2,500	$2,500	$2,500	$2,500	$2,500	
041-680100	Classroom Curriculum/Supplies	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	
041-680120	Dues and Subscriptions	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	
041-680150	Field Trip Expense	$5,000	$7,500	$7,500	$7,500	$10,000	$10,000	$10,000	$10,000	
041-680200	Lunch Expense	$145,800	$204,120	$256,770	$303,750	$346,680	$384,750	$380,700	$380,700	8
041-680500	Scholarships	$0	$0	$0	$0	$0	$5,000	$5,000	$5,000	
041-680510	College Expense - Restricted	$0	$0	$0	$0	$0	$95,679	$94,671	$94,671	9
041-681000	SaaS Expenses	$112,500	$178,900	$224,400	$265,000	$302,100	$335,000	$331,500	$331,500	11
041-690010	Insurance	$13,000	$13,000	$13,000	$13,000	$13,000	$13,000	$13,000	$13,000	6
041-690020	Bank Fees	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	
041-690030	Advertisement	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	
041-690040	Legal Fees	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	
041-690050	Interest Expense	$2,000	$2,000	$2,000	$2,000	$2,000	$2,000	$2,000	$2,000	
041-690100	Recreation Expense	$5,000	$7,500	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	
041-695000	Authorizer Fee	$27,990	$39,186	$49,294	$58,313	$66,554	$73,863	$73,085	$73,085	
041-700000	Miscellaneous Expense	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	
041-800000	Facility Fee	$658,200	$750,978	$714,052	$749,506	$785,060	$804,456	$857,710	$878,168	5
	Total Expense	**$2,038,495**	**$2,416,852**	**$2,971,017**	**$3,182,195**	**$3,451,259**	**$3,740,975**	**$3,789,081**	**$3,846,200**	
	Net Income before Debt Service	$22,801	$2,025	$42	$31,646	$212,938	$322,667	$232,663	$176,100	
	Debt Service Estimate	$0	$0	$0	$0	$0	$0	$0	$0	
	Net Income after Debt Service	**$22,801**	**$2,025**	**$42**	**$31,646**	**$212,938**	**$322,667**	**$232,663**	**$176,100**	

	13-14 Proj	14-15 Proj	15-16 Proj	16-17 Proj	17-18 Proj	18-19 Proj	19-20 Proj	20-21 Proj
Student Count (previous page)	180	252	317	375	428	475	470	470

1 Assumes the current $7,775 per student funding for 2R charter schools, less the anticipated network tax to cover the Center of Support Costs

2 Title I + Title II funding is based on a per pupil of $850

3 Staff Title	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation
Director	$ 80,000	$ 82,160	$ 84,378	$ 86,657	$ 88,996	$ 91,399	$ 93,867	$ 96,401
Dean of Students Lower		$ 60,000	$ 61,620	$ 63,284	$ 64,992	$ 66,747	$ 68,549	$ 70,400
Dean of Students Upper			$ 60,000	$ 61,620	$ 63,284	$ 64,992	$ 66,747	$ 68,549
Curriculum Coach	$ 55,000	$ 56,485	$ 58,010	$ 59,576	$ 61,185	$ 62,837	$ 64,534	$ 66,276
ELA Teacher	$ 50,000	$ 51,350	$ 52,736	$ 54,160	$ 55,623	$ 57,124	$ 58,667	$ 60,251
Math Teacher	$ 50,000	$ 51,350	$ 52,736	$ 54,160	$ 55,623	$ 57,124	$ 58,667	$ 60,251
Science Teacher	$ 50,000	$ 51,350	$ 52,736	$ 54,160	$ 55,623	$ 57,124	$ 58,667	$ 60,251
Social Studies Teacher	$ 50,000	$ 51,350	$ 52,736	$ 54,160	$ 55,623	$ 57,124	$ 58,667	$ 60,251
Physical Education Teacher	$ 25,000	$ 25,675	$ 48,000	$ 49,296	$ 50,627	$ 51,994	$ 53,398	$ 54,839
PT Arts and Humanities	$ 50,000	$ 51,350	$ 52,736	$ 54,160	$ 55,623	$ 57,124	$ 58,667	$ 60,251
ELA Teacher			$ 50,000	$ 51,350	$ 52,736	$ 54,160	$ 55,623	$ 57,124
Math Teacher			$ 50,000	$ 51,350	$ 52,736	$ 54,160	$ 55,623	$ 57,124
Science Teacher			$ 50,000	$ 51,350	$ 52,736	$ 54,160	$ 55,623	$ 57,124
Social Studies Teacher			$ 50,000	$ 51,350	$ 52,736	$ 54,160	$ 55,623	$ 57,124
Physical Education Teacher			$ 50,000	$ 51,350	$ 52,736	$ 54,160	$ 55,623	$ 57,124
PT Arts and Humanities	$ -	$ -	$ 24,000	$ 24,648	$ 25,313	$ 25,997	$ 26,699	
Instructional Advisor 1	$ 30,000	$ 30,810	$ 31,642	$ 32,496	$ 33,374	$ 34,275	$ 35,200	$ 36,151
Instructional Advisor 2	$ -	$ 30,000	$ 30,810	$ 31,642	$ 32,496	$ 33,374	$ 34,275	$ 35,200
Instructional Advisor 3		$ 30,000	$ 30,810	$ 31,642	$ 32,496	$ 33,374	$ 34,275	
Instructional Advisor 4			$ 30,000	$ 30,810	$ 31,642	$ 32,496	$ 33,374	
Instructional Advisor 5				$ 30,000	$ 30,810	$ 31,642	$ 32,496	
Instructional Advisor 6				$ 30,000	$ 30,810	$ 31,642		
Academic Counselor	$ 55,000	$ 56,485	$ 58,010	$ 59,576	$ 61,185	$ 62,837	$ 64,534	$ 66,276
Academic Counselor - College Focus				$ 55,000	$ 56,485	$ 58,010	$ 59,576	
Special Ed Teacher	$ 55,000	$ 56,485	$ 58,010	$ 59,576	$ 61,185	$ 62,837	$ 64,534	$ 66,276
Secretary	$ 35,000	$ 35,945	$ 36,916	$ 37,912	$ 38,936	$ 39,987	$ 41,067	$ 42,176
IT Technician	$ 45,000	$ 46,215	$ 47,463	$ 48,744	$ 50,060	$ 51,412	$ 52,800	$ 54,226
	$ 630,000	$ 737,010	$ 1,118,541	$ 1,202,742	$ 1,320,216	$ 1,385,862	$ 1,423,280	$ 1,461,708

4 Professional Development								
Project Based Learning - Instruction	$ 8,500	$ 8,500						
Project Based Learning - Coaching and OD	$ 7,500	$ 7,500						
Edmodo integration	$ 5,000							
PowerSchool On-Line PD	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500
Misc.		$ 5,000	$ 15,000	$ 15,000	$ 15,000	$ 15,000	$ 15,000	$ 15,000
	$ 23,500	$ 23,500	$ 17,500	$ 17,500	$ 17,500	$ 17,500	$ 17,500	$ 17,500

5 Is included on the Facilities Tab

6 Uses multiples listed on 'Variables' tab

7 Classroom / Office Furniture								
Principal's and Dean's Desk	$ 650	$ 650	$ 650					
Classroom Teacher's Desks	$ 2,560		$ 2,560					
Secretaries Desks	$ 593							
Counselor's Desk	$ 593							
Academic Advisors Desks	$ 593	$ 593	$ 593	$ 593				
Student Chairs	$ 11,358	$ 4,394	$ 2,421	$ 2,160	$ 1,974	$ 1,750		
Student Workstations	$ 54,650	$ 50,613	$ 37,375	$ 33,350	$ 30,475	$ 27,025		
Round Tables	$ 1,450	$ 1,450						
Classroom Tables	$ 2,033	$ 2,033						
Misc Furniture		$ 12,298	$ 12,298					
Service	$ 6,075	$ 5,400						
Furniture Replacement				$ 10,000	$ 10,000	$ 10,000	$ 10,000	$ 10,000
	$ 80,555	$ 77,431	$ 55,897	$ 46,103	$ 42,449	$ 38,775	$ 10,000	$ 10,000

8 Lunch Program								
Revenue	$ 12,960	$ 18,144	$ 22,824	$ 27,000	$ 30,816	$ 34,200	$ 33,840	$ 33,840
Reimbursement	$ 116,640	$ 163,296	$ 205,416	$ 243,000	$ 277,344	$ 307,800	$ 304,560	$ 304,560
Service Cost	$ 145,800	$ 204,120	$ 256,770	$ 303,750	$ 346,680	$ 384,750	$ 380,700	$ 380,700

9 College Expenses								
Cost per AP Test = $87								
50% of seniors taking 3 AP Tests						$ 17,711	$ 17,524	$ 17,524
2011 MATC Course = $383								
50% of seniors dual enrolling at MATC in 3 courses per year						$ 77,968	$ 77,147	$ 77,147
Total Restricted College Expenses	$ -	$ -	$ -	$ -	$ -	$ 95,679	$ 94,671	$ 94,671

10 Computer Equipment								
Content Server	$ 2,500	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Chromebook Laptops	$ 43,200	$ 60,480	$ 76,080	$ 46,800	$ 42,240	$ 37,920	$ 22,800	$ 10,080
Replacement Laptops				$ 10,000	$ 10,000	$ 10,000	$ 10,000	$ 10,000
Networking Equipment	$ 10,000	$ -	$ -	$ -	$ -	$ -	$ -	$ -
	$ 55,700	$ 60,480	$ 76,080	$ 56,800	$ 52,240	$ 47,920	$ 32,800	$ 20,080

11 Software as a Service (SaaS)								
Instructional platforms	$ 90,000	$ 151,200	$ 190,200	$ 225,000	$ 256,800	$ 285,000	$ 282,000	$ 282,000
Project Foundry	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500
Educational Elements Single Sign-on	$ 20,000	$ 25,200	$ 31,700	$ 37,500	$ 42,800	$ 47,500	$ 47,000	$ 47,000
	$ 112,500	$ 178,900	$ 224,400	$ 265,000	$ 302,100	$ 335,000	$ 331,500	$ 331,500

Quest School 2 - 6th thru 12th Grade School
8 Year Projected Budget

		15-16 Proj Budget	16-17 Proj Budget	17-18 Proj Budget	18-19 Proj Budget	19-20 Proj Budget	20-21 Proj Budget	21-22 Proj Budget	22-23 Proj Budget	
Student Count		180	252	317	375	428	475	470	470	
Per Pupil Revenue Before Network Tax		7,775	7,775	7,775	7,775	7,775	7,775	7,775	7,775	
Per Pupil Revenue After Network Tax		6,648	6,648	6,648	6,648	6,648	6,648	6,648	6,648	
Ledger #	**Operating Revenues**									
042-400001	Tuition - State	$1,196,573	$1,675,202	$2,107,297	$2,492,859	$2,845,184	$3,157,622	$3,124,384	$3,124,384	1
042-400002	Lunch Revenue	$12,960	$18,144	$22,824	$27,000	$30,816	$34,200	$33,840	$33,840	8
042-400005	Lunch Program Reibursement	$116,640	$163,296	$205,416	$243,000	$277,344	$307,800	$304,560	$304,560	8
042-400010	Title I & II	$153,000	$214,200	$269,450	$318,750	$363,800	$403,750	$399,500	$399,500	2
042-400015	Special Education EE Reimburse	$17,523	$17,996	$18,482	$18,981	$19,494	$20,020	$20,560	$21,116	
042-400020	IDEA Flow Through	$48,600	$68,040	$85,590	$101,250	$115,560	$128,250	$126,900	$126,900	
042-400050	Uniforms	$8,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	
042-400100	Field Trips	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	
042-400101	Miscellaneous Income	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000	
042-500010	Restricted DPI Implementation Grant	$250,000	$250,000	$250,000	$0	$0	$0	$0	$0	
042-500011	Restricted Walton Grant	$250,000	$0	$0	$0	$0	$0	$0	$0	
042-500012	Donations	$0	$0	$0	$0	$0	$0	$0	$0	
042-500013	Donations - Restricted	$0	$0	$0	$0	$0	$0	$0	$0	
042-500014	Donations - Unrestricted	$0	$0	$0	$0	$0	$0	$0	$0	
	Net Operating Revenue	$2,061,296	$2,418,878	$2,971,059	$3,213,840	$3,664,197	$4,063,642	$4,021,744	$4,022,299	
	Operating Expense									
042-600000	Salary Expense	$607,500	$735,795	$1,117,293	$1,201,460	$1,318,900	$1,384,510	$1,421,892	$1,460,283	3
042-610010	Employer Tax Expense	$57,713	$69,901	$106,143	$114,139	$125,295	$131,528	$135,080	$138,727	6
042-610020	Health Insurance	$97,200	$117,727	$178,767	$192,234	$211,024	$221,522	$227,503	$233,645	
042-610030	Dental Insurance	$12,150	$14,716	$22,346	$24,029	$26,378	$27,690	$28,438	$29,206	6
042-610040	Life Insurance	$20,613	$24,189	$29,711	$32,138	$36,642	$40,636	$40,217	$40,223	6
042-620010	Accountant/Audit Fees	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	
042-620050	Professional Development	$10,500	$15,600	$17,500	$17,500	$17,500	$17,500	$17,500	$17,500	4
042-620100	Consulting Expense	$5,000	$5,000	$5,000	$5,000	$5,000	$20,000	$20,000	$20,000	
042-620500	Outside Services - Restricted	$0	$0	$0	$0	$0	$0	$0	$0	
042-630010	Transportation	$15,000	$15,000	$15,000	$15,000	$15,000	$15,000	$15,000	$15,000	
042-640000	Property Taxes	$0	$0	$0	$0	$0	$0	$0	$0	
042-640010	Telephone	$9,500	$9,500	$9,500	$9,500	$9,500	$9,500	$9,500	$9,500	
042-640020	Cable	$3,700	$3,700	$3,700	$3,700	$3,700	$3,700	$3,700	$3,700	
042-650000	Copier Expense	$15,000	$15,000	$15,000	$15,000	$15,000	$15,000	$15,000	$15,000	
042-650020	Printing	$4,500	$4,500	$4,500	$4,500	$4,500	$4,500	$4,500	$4,500	
042-650030	Postage	$2,000	$4,000	$6,000	$6,000	$6,000	$6,000	$6,000	$6,000	
042-650050	Office Supplies	$5,000	$10,000	$5,000	$10,000	$10,000	$10,000	$10,000	$10,000	
042-660010	Office/Classroom Furniture	$80,555	$77,431	$16,101	$10,593	$10,000	$10,000	$10,000	$10,000	7
042-660100	Computer Equipment	$55,700	$60,480	$76,080	$56,800	$52,240	$47,920	$32,800	$20,080	10
042-680010	Uniform Expense	$8,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	
042-680050	Technology Upgrades	$0	$2,500	$2,500	$2,500	$2,500	$2,500	$2,500	$2,500	
042-680100	Classroom Curriculum/Supplies	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	
042-680120	Dues and Subscriptions	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	
042-680150	Field Trip Expense	$5,000	$7,500	$5,000	$7,500	$10,000	$10,000	$10,000	$10,000	
042-680200	Lunch Expense	$145,800	$204,120	$256,770	$303,750	$346,680	$384,750	$380,700	$380,700	8
042-680500	Scholarships	$0	$0	$0	$0	$0	$5,000	$5,000	$5,000	
042-680510	College Expense - Restricted	$0	$0	$0	$0	$0	$95,679	$94,671	$94,671	9
042-681000	SaaS Expenses	$112,500	$153,700	$192,700	$227,500	$259,300	$287,500	$284,500	$284,500	11
042-690010	Insurance	$13,000	$13,000	$13,000	$13,000	$13,000	$13,000	$13,000	$13,000	6
042-690020	Bank Fees	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	
042-690030	Advertisement	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	
042-690040	Legal Fees	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	
042-690050	Interest Expense	$2,000	$2,000	$2,000	$2,000	$2,000	$2,000	$2,000	$2,000	
042-690100	Recreation Expense	$3,000	$7,500	$5,000	$10,000	$10,000	$10,000	$10,000	$10,000	
042-695000	Authorizer Fee	$27,990	$39,186	$49,294	$58,313	$66,554	$73,863	$73,085	$73,085	
042-700000	Miscellaneous Expense	$0	$3,000	$0	$3,000	$3,000	$3,000	$3,000	$3,000	
042-800000	Facility Fee	$714,052	$749,506	$785,060	$804,456	$857,710	$878,168	$889,391	$910,705	5
	Total Expense	$2,060,972	$2,396,551	$2,970,964	$3,181,612	$3,469,423	$3,762,466	$3,796,977	$3,854,525	
	Net Income before Debt Service	$323	$22,327	$96	$32,229	$194,774	$301,176	$224,767	$167,775	
	Debt Service Estimate	$0	$0	$0	$0	$0	$0	$0	$0	
	Net Income after Debt Service	$323	$22,327	$96	$32,229	$194,774	$301,176	$224,767	$167,775	

	15-16 Projected	16-17 Projected	17-18 Projected	18-19 Projected	19-20 Projected	20-21 Projected	21-22 Projected	22-23 Projected
Student Count (previous page)	180	252	317	375	428	475	470	470

1 Assumes the current $7,775 per student funding for 2R charter schools, less the anticipated network tax to cover the Center of Support Costs

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3

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Dean of Students Lower		$ 60,000	$ 61,620	$ 63,284	$ 64,992	$ 66,747	$ 68,549	$ 70,400
Dean of Students Upper			$ 60,000	$ 61,620	$ 63,284	$ 64,992	$ 66,747	$ 68,549
Curriculum Coach	$ 55,000	$ 56,485	$ 58,010	$ 59,576	$ 61,185	$ 62,837	$ 64,534	$ 66,276
ELA Teacher	$ 50,000	$ 51,350	$ 52,736	$ 54,160	$ 55,623	$ 57,124	$ 58,667	$ 60,251
Math Teacher	$ 50,000	$ 51,350	$ 52,736	$ 54,160	$ 55,623	$ 57,124	$ 58,667	$ 60,251
Science Teacher	$ 50,000	$ 51,350	$ 52,736	$ 54,160	$ 55,623	$ 57,124	$ 58,667	$ 60,251
Social Studies Teacher	$ 50,000	$ 51,350	$ 52,736	$ 54,160	$ 55,623	$ 57,124	$ 58,667	$ 60,251
Physical Education Teacher	$ 25,000	$ 25,675	$ 48,000	$ 49,296	$ 50,627	$ 51,994	$ 53,398	$ 54,839
PT Arts and Humanities	$ 50,000	$ 51,350	$ 52,736	$ 54,160	$ 55,623	$ 57,124	$ 58,667	$ 60,251
ELA Teacher			$ 50,000	$ 51,350	$ 52,736	$ 54,160	$ 55,623	$ 57,124
Math Teacher			$ 50,000	$ 51,350	$ 52,736	$ 54,160	$ 55,623	$ 57,124
Science Teacher			$ 50,000	$ 51,350	$ 52,736	$ 54,160	$ 55,623	$ 57,124
Social Studies Teacher			$ 50,000	$ 51,350	$ 52,736	$ 54,160	$ 55,623	$ 57,124
Physical Education Teacher			$ 50,000	$ 51,350	$ 52,736	$ 54,160	$ 55,623	$ 57,124
PT Arts and Humanities	$ -	$ -	$ 24,000	$ 24,648	$ 25,313	$ 25,997	$ 26,699
Instructional Advisor 1	$ 30,000	$ 30,810	$ 31,642	$ 32,496	$ 33,374	$ 34,275	$ 35,200	$ 36,151
Instructional Advisor 2	$ -	$ 30,000	$ 30,810	$ 31,642	$ 32,496	$ 33,374	$ 34,275	$ 35,200
Instructional Advisor 3			$ 30,000	$ 30,810	$ 31,642	$ 32,496	$ 33,374	$ 34,275
Instructional Advisor 4				$ 30,000	$ 30,810	$ 31,642	$ 32,496	$ 33,374
Instructional Advisor 5					$ 30,000	$ 30,810	$ 31,642	$ 32,496
Instructional Advisor 6						$ 30,000	$ 30,810	$ 31,642
Academic Counselor	$ 55,000	$ 56,485	$ 58,010	$ 59,576	$ 61,185	$ 62,837	$ 64,534	$ 66,276
Academic Counselor - College Focus					$ 55,000	$ 56,485	$ 58,010	$ 59,576
Special Ed Teacher	$ 55,000	$ 56,485	$ 58,010	$ 59,576	$ 61,185	$ 62,837	$ 64,534	$ 66,276
Secretary	$ 35,000	$ 35,945	$ 36,916	$ 37,912	$ 38,936	$ 39,987	$ 41,067	$ 42,176
IT Technician	$ 22,500	$ 45,000	$ 46,215	$ 47,463	$ 48,744	$ 50,060	$ 51,412	$ 52,800
	$ 607,500	$ 735,795	$ 1,117,293	$ 1,201,460	$ 1,318,900	$ 1,384,510	$ 1,421,892	$ 1,460,283

4 **Professional Development**

Project Based Learning - Instruction	$ 4,250	$ 4,350						
Project Based Learning - Coaching and OD	$ 3,750	$ 3,750						
PowerSchool On-Line PD	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500
Misc.		$ 5,000	$ 15,000	$ 15,000	$ 15,000	$ 15,000	$ 15,000	$ 15,000
	$ 10,500	$ 15,600	$ 17,500	$ 17,500	$ 17,500	$ 17,500	$ 17,500	$ 17,500

5 **Is included on the Facilities Tab**

6 **Uses multiples listed on 'Variables' tab**

7 **Classroom / Office Furniture**

Principal's and Dean's Desk	$ 650	$ 650	$ 650					
Classroom Teacher's Desks	$ 2,560		$ 2,560					
Secretaries Desks	$ 593							
Counselor's Desk	$ 593							
Academic Advisors Desks	$ 593	$ 593	$ 593	$ 593				
Student Chairs	$ 11,358	$ 4,394	$ -	$ -	$ -	$ -	$ -	
Student Workstations	$ 54,650	$ 50,613	$ -	$ -	$ -	$ -	$ -	
Round Tables	$ 1,450	$ 1,450						
Classroom Tables	$ 2,033	$ 2,033						
Misc Furniture		$ 12,298	$ 12,298					
Service	$ 6,075	$ 5,400						
Furniture Replacement				$ 10,000	$ 10,000	$ 10,000	$ 10,000	$ 10,000
	$ 80,555	$ 77,431	$ 16,101	$ 10,593	$ 10,000	$ 10,000	$ 10,000	$ 10,000

8 **Lunch Program**

Revenue	$ 12,960	$ 18,144	$ 22,824	$ 27,000	$ 30,816	$ 34,200	$ 33,840	$ 33,840
Reimbursement	$ 116,640	$ 163,296	$ 205,416	$ 243,000	$ 277,344	$ 307,800	$ 304,560	$ 304,560
Service Cost	$ 145,800	$ 204,120	$ 256,770	$ 303,750	$ 346,680	$ 384,750	$ 380,700	$ 380,700

8 **College Expenses**

Cost per AP Test = $87								
50% of seniors taking 3 AP Tests						$ 17,711	$ 17,524	$ 17,524
2011 MATC Course = $383								
50% of seniors dual enrolling at MATC in 3 courses per year						$ 77,968	$ 77,147	$ 77,147
Total Restricted College Expenses	$ -	$ -	$ -	$ -	$ -	$ 95,679	$ 94,671	$ 94,671

9 **Computer Equipment**

Content Server	$ 2,500			$ -	$ -		$ -	$ -
Chromebook Laptops	$ 43,200	$ 60,480	$ 76,080	$ 46,800	$ 42,240	$ 37,920	$ 22,800	$ 10,080
Replacement Laptops				$ 10,000	$ 10,000	$ 10,000	$ 10,000	$ 10,000
Networking Equipment	$ 10,000	$ -	$ -	$ -	$ -	$ -	$ -	$ -
	$ 55,700	$ 60,480	$ 76,080	$ 56,800	$ 52,240	$ 47,920	$ 32,800	$ 20,080

Software as a Service (SaaS)

10

Instructional platforms	$ 90,000	$ 126,000	$ 158,500	$ 187,500	$ 214,000	$ 237,500	$ 235,000	$ 235,000
Project Foundry	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500
Educational Elements Single Sign-on	$ 20,000	$ 25,200	$ 31,700	$ 37,500	$ 42,800	$ 47,500	$ 47,000	$ 47,000
	$ 112,500	$ 153,700	$ 192,700	$ 227,500	$ 259,300	$ 287,500	$ 284,500	$ 284,500

Quest School 3 - 6th thru 12th Grade School
8 Year Projected Budget

		16-17 Proj Budget	17-18 Proj Budget	18-19 Proj Budget	19-20 Proj Budget	20-21 Proj Budget	21-22 Proj Budget	22-23 Proj Budget	23-24 Proj Budget	
Student Count		180	252	317	375	428	475	475	475	
Per Pupil Revenue Before Network Tax		7,775	7,775	7,775	7,775	7,775	7,775	7,775	7,775	
Per Pupil Revenue After Network Tax		6,648	6,648	6,648	6,648	6,648	6,648	6,648	6,648	
Ledger #	**Operating Revenues**									
043-400001	Tuition - State	$1,196,573	$1,675,202	$2,107,297	$2,492,859	$2,845,184	$3,157,622	$3,157,622	$3,157,622	1
043-400002	Lunch Revenue	$12,960	$18,144	$22,824	$27,000	$30,816	$34,200	$34,200	$34,200	
043-400005	Lunch Program Reibursement	$116,640	$163,296	$205,416	$243,000	$277,344	$307,800	$307,800	$307,800	
043-400010	Title I & II	$153,000	$214,200	$269,450	$318,750	$363,800	$403,750	$403,750	$403,750	2
043-400015	Special Education EE Reimburse	$17,523	$17,996	$18,482	$18,981	$19,494	$20,020	$20,560	$21,116	
043-400020	IDEA Flow Through	$48,600	$68,040	$85,590	$101,250	$115,560	$128,250	$128,250	$128,250	
043-400050	Uniforms	$8,000	$8,000	$8,000	$8,000	$8,000	$8,000	$8,000	$8,000	
043-400100	Field Trips	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	
043-400101	Miscellaneous Income	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000	
043-500010	Restricted DPI Implementation Grant	$250,000	$250,000	$250,000	$0	$0	$0	$0	$0	
043-500011	Restricted Walton Grant	$250,000	$0	$0	$0	$0	$0	$0	$0	
043-500012	Donations	$0	$0	$0	$0	$0	$0	$0	$0	
043-500013	Donations - Restricted	$0	$0	$0	$0	$0	$0	$0	$0	
043-500014	Donations - Unrestricted	$0	$0	$0	$0	$0	$0	$0	$0	
	Net Operating Revenue	**$2,061,296**	**$2,422,878**	**$2,975,059**	**$3,217,840**	**$3,668,197**	**$4,067,642**	**$4,068,182**	**$4,068,737**	
	Operating Expense									
043-600000	Salary Expense	$575,000	$734,310	$1,115,768	$1,199,894	$1,317,291	$1,382,858	$1,420,195	$1,458,540	3
043-610010	Employer Tax Expense	$54,625	$69,759	$105,998	$113,990	$125,143	$131,371	$134,919	$138,561	6
043-610020	Health Insurance	$92,000	$117,490	$178,523	$191,983	$210,767	$221,257	$227,231	$233,366	6
043-610020	Dental Insurance	$11,500	$14,686	$22,315	$23,998	$26,346	$27,657	$28,404	$29,171	6
043-610030	Life Insurance	$5,750	$7,343	$11,158	$11,999	$13,173	$13,829	$14,202	$14,585	6
043-620010	Accountant/Audit Fees	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	
043-620050	Professional Development	$10,500	$15,500	$17,500	$17,500	$17,500	$17,500	$17,500	$17,500	4
043-620100	Consulting Expense	$5,000	$5,000	$5,000	$5,000	$5,000	$20,000	$20,000	$20,000	
043-620500	Outside Services - Restricted	$0	$0	$0	$0	$0	$0	$0	$0	
043-630010	Transportation	$15,000	$15,000	$9,000	$15,000	$15,000	$15,000	$15,000	$15,000	
043-640000	Property Taxes	$0	$0	$0	$0	$0	$0	$0	$0	
043-640010	Telephone	$9,500	$9,500	$9,500	$9,500	$9,500	$9,500	$9,500	$9,500	
043-640020	Cable	$3,700	$3,700	$3,700	$3,700	$3,700	$3,700	$3,700	$3,700	
043-650000	Copier Expense	$15,000	$15,000	$15,000	$15,000	$15,000	$15,000	$15,000	$15,000	
043-650020	Printing	$4,500	$4,500	$4,500	$4,500	$4,500	$4,500	$4,500	$4,500	
043-650030	Postage	$2,000	$4,000	$4,000	$6,000	$6,000	$6,000	$6,000	$6,000	
043-650050	Office Supplies	$5,000	$10,000	$8,000	$10,000	$10,000	$10,000	$10,000	$10,000	
043-660010	Office/Classroom Furniture	$80,555	$77,431	$16,101	$10,593	$10,000	$10,000	$10,000	$10,000	7
043-660100	Computer Equipment	$55,700	$60,480	$76,080	$56,800	$52,240	$47,920	$34,000	$21,280	10
043-680050	Uniform Expense	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	
043-680050	Technology Upgrades	$0	$2,500	$2,500	$2,500	$2,500	$2,500	$2,500	$2,500	
043-680100	Classroom Curriculum/Supplies	$10,000	$10,000	$8,000	$10,000	$10,000	$10,000	$10,000	$10,000	
043-680120	Dues and Subscriptions	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	
043-680150	Field Trip Expense	$5,000	$7,500	$7,500	$7,500	$10,000	$10,000	$10,000	$10,000	
043-680200	Lunch Expense	$145,800	$204,120	$256,770	$303,750	$346,680	$384,750	$384,750	$384,750	8
043-680500	Scholarships	$0	$0	$0	$0	$0	$5,000	$5,000	$5,000	
043-680510	College Expense - Restricted	$0	$0	$0	$0	$0	$95,679	$95,679	$95,679	9
043-681000	SaaS Expenses	$112,500	$153,700	$192,700	$227,500	$259,300	$287,500	$287,500	$287,500	11
043-690010	Insurance	$13,000	$13,000	$13,000	$13,000	$13,000	$13,000	$13,000	$13,000	6
043-690020	Bank Fees	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	
043-690030	Advertisement	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	
043-690040	Legal Fees	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	
043-690050	Interest Expense	$2,000	$2,000	$2,000	$2,000	$2,000	$2,000	$2,000	$2,000	
043-690100	Recreation Expense	$5,000	$7,500	$5,000	$10,000	$10,000	$10,000	$10,000	$10,000	
043-695000	Authorizer Fee	$27,990	$39,186	$49,294	$58,313	$66,554	$73,863	$73,863	$73,863	
043-700000	Miscellaneous Expense	$3,000	$4,000	$4,000	$6,000	$6,000	$6,000	$6,000	$6,000	
043-800000	Facility Fees	$749,506	$785,060	$804,456	$857,710	$878,168	$889,391	$910,705	$878,608	5
	Total Expense	**$2,041,126**	**$2,414,265**	**$2,969,363**	**$3,215,729**	**$3,467,361**	**$3,747,775**	**$3,803,146**	**$3,807,604**	
	Net Income before Debt Service	$20,169	$8,613	$5,696	$2,111	$200,836	$319,867	$265,036	$261,134	
	Debt Service Estimate	$0	$0	$0	$0	$0	$0	$0	$0	
	Net Income after Debt Service	**$20,169**	**$8,613**	**$5,696**	**$2,111**	**$200,836**	**$319,867**	**$265,036**	**$261,134**	

	16-17 Projected	17-18 Projected	18-19 Projected	19-20 Projected	20-21 Projected	21-22 Projected	22-23 Projected	23-24 Projected
Student Count (previous page)	180	252	317	375	428	475	475	475

1 Assumes the current $7,775 per student funding for 2R charter schools, less the anticipated network tax to cover the Center of Support Costs

2 Title I + Title II funding is based on a per pupil of $850

3

Staff Title	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation
Director	$ 80,000	$ 82,160	$ 84,378	$ 86,657	$ 88,996	$ 91,399	$ 93,867	$ 96,401
Dean of Students Lower		$ 60,000	$ 61,620	$ 63,284	$ 64,992	$ 66,747	$ 68,549	$ 70,400
Dean of Students Upper			$ 60,000	$ 61,620	$ 63,284	$ 64,992	$ 66,747	$ 68,549
Curriculum Coach	$ 55,000	$ 56,485	$ 58,010	$ 59,576	$ 61,185	$ 62,837	$ 64,534	$ 66,276
ELA Teacher	$ 50,000	$ 51,350	$ 52,736	$ 54,160	$ 55,623	$ 57,124	$ 58,667	$ 60,251
Math Teacher	$ 50,000	$ 51,350	$ 52,736	$ 54,160	$ 55,623	$ 57,124	$ 58,667	$ 60,251
Science Teacher	$ 50,000	$ 51,350	$ 52,736	$ 54,160	$ 55,623	$ 57,124	$ 58,667	$ 60,251
Social Studies Teacher	$ 50,000	$ 51,350	$ 52,736	$ 54,160	$ 55,623	$ 57,124	$ 58,667	$ 60,251
Physical Education Teacher	$ 25,000	$ 25,675	$ 48,000	$ 49,296	$ 50,627	$ 51,994	$ 53,398	$ 54,839
PT Arts and Humanities	$ 50,000	$ 51,350	$ 52,736	$ 54,160	$ 55,623	$ 57,124	$ 58,667	$ 60,251
ELA Teacher			$ 50,000	$ 51,350	$ 52,736	$ 54,160	$ 55,623	$ 57,124
Math Teacher			$ 50,000	$ 51,350	$ 52,736	$ 54,160	$ 55,623	$ 57,124
Science Teacher			$ 50,000	$ 51,350	$ 52,736	$ 54,160	$ 55,623	$ 57,124
Social Studies Teacher			$ 50,000	$ 51,350	$ 52,736	$ 54,160	$ 55,623	$ 57,124
Physical Education Teacher			$ 50,000	$ 51,350	$ 52,736	$ 54,160	$ 55,623	$ 57,124
PT Arts and Humanities	$ -	$ -	$ 24,000	$ 24,648	$ 25,313	$ 25,997	$ 26,699
Instructional Advisor 1	$ 30,000	$ 30,810	$ 31,642	$ 32,496	$ 33,374	$ 34,275	$ 35,200	$ 36,151
Instructional Advisor 2	$ -	$ 30,000	$ 30,810	$ 31,642	$ 32,496	$ 33,374	$ 34,275	$ 35,200
Instructional Advisor 3			$ 30,000	$ 30,810	$ 31,642	$ 32,496	$ 33,374	$ 34,275
Instructional Advisor 4				$ 30,000	$ 30,810	$ 31,642	$ 32,496	$ 33,374
Instructional Advisor 5					$ 30,000	$ 30,810	$ 31,642	$ 32,496
Instructional Advisor 6						$ 30,000	$ 30,810	$ 31,642
Academic Counselor	$ 22,500	$ 55,000	$ 56,485	$ 58,010	$ 59,576	$ 61,185	$ 62,837	$ 64,534
Academic Counselor - College Focus						$ 55,000	$ 56,485	$ 58,010	$ 59,576
Special Ed Teacher	$ 55,000	$ 56,485	$ 58,010	$ 59,576	$ 61,185	$ 62,837	$ 64,534	$ 66,276
Secretary	$ 35,000	$ 35,945	$ 36,916	$ 37,912	$ 38,936	$ 39,987	$ 41,067	$ 42,176
IT Technician	$ 22,500	$ 45,000	$ 46,215	$ 47,463	$ 48,744	$ 50,060	$ 51,412	$ 52,800
	$ 575,000	$ 734,310	$ 1,115,768	$ 1,199,894	$ 1,317,291	$ 1,382,858	$ 1,420,195	$ 1,458,540

4 **Professional Development**

Project Based Learning - Instruction	$ 4,250	$ 4,250						
Project Based Learning - Coaching and OD	$ 3,750	$ 3,750						
PowerSchool On-Line PD	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500
Misc.		$ 5,000	$ 15,000	$ 15,000	$ 15,000	$ 15,000	$ 15,000	$ 15,000
	$ 10,500	$ 15,500	$ 17,500	$ 17,500	$ 17,500	$ 17,500	$ 17,500	$ 17,500

5 Is included on the Facilities Tab

6 Uses multiples listed on 'Variables' tab

7 **Classroom / Office Furniture**

Principal's and Dean's Desk	$ 650	$ 650	$ 650					
Classroom Teacher's Desks	$ 2,560		$ 2,560					
Secretaries Desks	$ 593							
Counselor's Desk	$ 593							
Academic Advisors Desks	$ 593	$ 593	$ 593	$ 593				
Student Chairs	$ 11,358	$ 4,394	$ -	$ -	$ -	$ -	$ -	
Student Workstations	$ 54,650	$ 50,613	$ -	$ -	$ -	$ -	$ -	
Round Tables	$ 1,450	$ 1,450						
Classroom Tables	$ 2,033	$ 2,033						
Misc Furniture		$ 12,298	$ 12,298					
Service	$ 6,075	$ 5,400						
Furniture Replacement				$ 10,000	$ 10,000	$ 10,000	$ 10,000	$ 10,000
	$ 80,555	$ 77,431	$ 16,101	$ 10,593	$ 10,000	$ 10,000	$ 10,000	$ 10,000

8 **Lunch Program**

Revenue	$ 12,960	$ 18,144	$ 22,824	$ 27,000	$ 30,816	$ 34,200	$ 34,200	$ 34,200
Reimbursement	$ 116,640	$ 163,296	$ 205,416	$ 243,000	$ 277,344	$ 307,800	$ 307,800	$ 307,800
Service Cost	$ 145,800	$ 204,120	$ 256,770	$ 303,750	$ 346,680	$ 384,750	$ 384,750	$ 384,750

8 **College Expenses**

Cost per AP Test = $87

50% of seniors taking 3 AP Tests	$ -	$ -	$ -	$ -	$ -	$ 17,711	$ 17,711	$ 17,711

2011 MATC Course = $383
50% of seniors dual enrolling at MATC in 3

9

courses per year	$ -	$ -	$ -	$ -	$ -	$ 77,968	$ 77,968	$ 77,968
Total Restricted College Expenses	$ -	$ -	$ -	$ -	$ -	$ 95,679	$ 95,679	$ 95,679

Content Server	$ 2,500	$ -	$ -	$ -	$ -	$ -	$ -	$ -
10 Chromebook Laptops	$ 43,200	$ 60,480	$ 76,080	$ 46,800	$ 42,240	$ 37,920	$ 24,000	$ 11,280
Replacement Laptops				$ 10,000	$ 10,000	$ 10,000	$ 10,000	$ 10,000
Networking Equipment	$ 10,000	$ -	$ -	$ -	$ -	$ -	$ -	$ -
	$ 55,700	$ 60,480	$ 76,080	$ 56,800	$ 52,240	$ 47,920	$ 34,000	$ 21,280

Software as a Service (SaaS)

Instructional platforms	$ 90,000	$ 126,000	$ 158,500	$ 187,500	$ 214,000	$ 237,500	$ 237,500	$ 237,500
Project Foundry	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500
Educational Elements Single Sign-on	$ 20,000	$ 25,200	$ 31,700	$ 37,500	$ 42,800	$ 47,500	$ 47,500	$ 47,500
	$ 112,500	$ 153,700	$ 192,700	$ 227,500	$ 259,300	$ 287,500	$ 287,500	$ 287,500

s LLC Model
ted Budget

	13-14 Proj Budget	14-15 Proj Budget	15-16 Proj Budget	16-17 Proj Budget	17-18 Proj Budget	18-19 Proj Budget	19-20 Proj Budget	20-21 Proj Budget	21-22 Proj
Operating Revenues									
School 1 Facility Fees	$632,500	$699,578	$717,116	$785,128	$803,627	$822,625	$842,135	$862,173	$882,752
School 2 Facility Fees			$632,500	$699,578	$717,116	$735,128	$803,627	$822,625	$842,135
School 3 Facility Fees				$632,500	$699,578	$717,116	$785,128	$803,627	$822,625
Net Operating Revenue	$0	$0	$632,500	$1,332,078	$1,416,694	$1,452,244	$1,588,755	$1,626,251	$1,664,760
Operating Expense									
School 1									
Rent Expense School 1	$400,000	$410,800	$421,892	$433,283	$444,981	$456,996	$469,335	$482,007	$495,021
Electric/Gas/Water School 1	$200,000	$205,400	$210,946	$216,641	$222,491	$228,498	$234,667	$241,003	$247,510
Building Insurance School 1	$7,500	$7,703	$7,910	$8,124	$8,343	$8,569	$8,800	$9,038	$9,282
Capital Reserves		$50,000	$50,000	$100,000	$100,000	$100,000	$100,000	$100,000	$100,000
Building Maintenance/Repair School 1	$15,000	$15,405	$15,821	$16,248	$16,687	$17,137	$17,600	$18,075	$18,563
Janitorial Supplies School 1	$10,000	$10,270	$10,547	$10,832	$11,125	$11,425	$11,733	$12,050	$12,376
	$632,500	$699,578	$717,116	$785,128	$803,627	$822,625	$842,135	$862,173	$882,752
School 2									
Rent Expense School 2			$400,000	$410,800	$421,892	$433,283	$444,981	$456,996	$469,335
Electric/Gas/Water School 2			$200,000	$205,400	$210,946	$216,641	$222,491	$228,498	$234,667
Building Insurance School 2			$7,500	$7,703	$7,910	$8,124	$8,343	$8,569	$8,800
Capital Reserves			$50,000	$50,000	$50,000	$50,000	$100,000	$100,000	$100,000
Building Maintenance/Repair School 2			$15,000	$15,405	$15,821	$16,248	$16,687	$17,137	$17,600
Janitorial Supplies School 2			$10,000	$10,270	$10,547	$10,832	$11,125	$11,425	$11,733
			$632,500	$699,578	$717,116	$735,128	$803,627	$822,625	$842,135
School 3									
Rent Expense School 3				$400,000	$410,800	$421,892	$433,283	$444,981	$456,996
Electric/Gas/Water School 3				$200,000	$205,400	$210,946	$216,641	$222,491	$228,498
Building Insurance School 3				$7,500	$7,703	$7,910	$8,124	$8,343	$8,569
Capital Reserves				$50,000	$50,000	$100,000	$100,000	$100,000	$100,000
Building Maintenance/Repair School 3				$15,000	$15,405	$15,821	$16,248	$16,687	$17,137
Janitorial Supplies School 3				$10,000	$10,270	$10,547	$10,832	$11,125	$11,425
				$632,500	$699,578	$717,116	$785,128	$803,627	$822,625
Custodial Wages	$20,000	$40,000	$61,080	$102,189	$104,948	$107,782	$110,692	$113,681	$93,900
Health Insurance	$3,200	$6,400	$9,773	$16,350	$16,792	$17,245	$17,711	$18,189	$15,024
Dental Insurance	$400	$800	$1,222	$2,044	$2,099	$2,156	$2,214	$2,274	$1,878
Life Insurance	$200	$400	$611	$1,022	$1,049	$1,078	$1,107	$1,137	$939
Employer Tax Expense	$1,900	$3,800	$5,803	$9,708	$9,970	$10,239	$10,516	$10,800	$8,921
	$25,700	$51,400	$78,488	$131,313	$134,859	$138,500	$142,239	$146,080	$120,662
Total Facilities Cost	$658,200	$750,978	$1,428,104	$2,248,519	$2,355,179	$2,413,369	$2,573,130	$2,634,504	$2,668,174

Facilities LLC Budget Notes	13-14 Proj	14-15 Proj	15-16 Proj	16-17 Proj	17-18 Proj	18-19 Proj	19-20 Proj	20-21 Proj	21-22 Proj	22-23 Proj	23-24 Proj
Staff Title	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation
Custodian	$ 20,000	$ 40,000	$ 41,080	$ 42,189	$ 43,328	$ 44,498	$ 45,700	$ 46,933	48,201	$ 49,502	$ 50,839
Custodian			$ 20,000	$ 40,000	$ 41,080	$ 42,189	$ 43,328	$ 44,498	45,700	$ 46,933	$ 48,201
Custodian				$ 20,000	$ 20,540	$ 21,095	$ 21,664	$ 22,249			
	$ 20,000	$ 40,000	$ 61,080	$ 102,189	$ 104,948	$ 107,782	$ 110,692	$ 113,681	93,900	$ 96,436	$ 99,039

Quest Center of Support
10 Year Financial Model

		12-13 Proj	13-14 Proj	14-15 Proj	15-16 Proj	16-17 Proj	17-18 Proj	18-19 Proj	19-20 Proj	20-21 Proj	21-22 Proj
Student Count		0	180	252	497	807	997	1,167	1,273	1,373	1,415
Per Pupil Revenue Before Network Tax		7,775	7,775	7,775	7,775	7,775	7,775	7,775	7,775	7,775	7,775
Per Pupil Network Tax		1,127	1,127	1,127	1,127	1,127	1,127	1,127	1,127	1,127	1,127
Ledger #	**Operating Revenues**										
010-410000	School Tax	$0	$202,928	$284,099	$560,305	$909,792	$1,123,993	$1,315,647	$1,435,148	$1,547,886	$1,595,236
010-500012	Donations	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
010-500013	Donations - Restricted	$450,000	$271,000	$488,000	$464,000	$101,000	$0	$0	$0	$0	$0
010-500014	Donations - Unrestricted	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
010-400101	Miscellaneous Income	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
	Net Operating Revenue	**$450,000**	**$473,928**	**$772,099**	**$1,024,305**	**$1,010,792**	**$1,123,993**	**$1,315,647**	**$1,435,148**	**$1,547,886**	**$1,595,236**
	Operating Expense										
010-600000	1 Salary Expense	$215,000	$138,645	$334,388	$501,257	$592,631	$688,632	$707,225	$726,320	$745,931	$766,071
010-610010	Employer Tax Expense	$20,425	$13,171	$31,767	$47,619	$56,300	$65,420	$67,186	$69,000	$70,863	$72,777
010-610020	Health Insurance	$34,400	$22,183	$53,502	$80,201	$94,821	$110,181	$113,156	$116,211	$119,349	$122,571
010-610030	Dental Insurance	$4,300	$2,773	$6,688	$10,025	$11,853	$13,773	$14,144	$14,526	$14,919	$15,321
010-610040	Life Insurance	$2,150	$1,386	$3,344	$5,013	$5,926	$6,886	$7,072	$7,263	$7,459	$7,661
010-620010	Accountant/Audit Fees	$6,000	$6,000	$6,000	$6,000	$6,000	$6,000	$6,000	$6,000	$6,000	$6,000
010-620050	2 Professional Development	$2,000	$10,100	$15,250	$15,250	$15,500	$15,500	$15,500	$15,500	$15,500	$15,500
010-620100	2 Consulting Expense	$95,000	$105,675	$106,908	$133,175	$26,664	$5,000	$5,000	$5,000	$5,000	$5,000
010-620500	Outside Services - Restricted	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
010-630010	5 Transportation	$19,840	$4,800	$28,835	$34,248	$18,000	$20,400	$20,400	$20,400	$20,400	$20,400
010-640000	Property Taxes	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
010-640010	Telephone	$2,500	$3,600	$3,600	$3,600	$3,600	$3,600	$3,600	$3,600	$3,600	$3,600
010-640020	Cable	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
010-650000	Copier Expense	$2,000	$10,000	$12,500	$12,500	$12,500	$12,500	$12,500	$12,500	$12,500	$12,500
010-650020	Printing	$2,000	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000
010-650030	Postage	$5,000	$5,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000
010-650050	Office Supplies	$2,000	$2,000	$3,000	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000
010-660010	Office/Classroom Furniture	$6,000	$5,000	$10,000	$10,000	$5,000	$2,000	$2,000	$2,000	$2,000	$2,000
010-660100	Computer Equipment	$500	$6,000	$9,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000
010-680050	Technology Upgrades	$0	$0	$0	$0	$0	$2,000	$2,000	$2,000	$2,000	$2,000
010-680120	Dues and Subscriptions	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000
010-681000	6 SaaS Expenses	$0	$8,100	$7,325	$18,952	$14,882	$15,568	$16,166	$16,576	$16,999	$17,434
010-690010	Insurance	$2,500	$4,000	$6,000	$6,000	$6,000	$6,000	$6,000	$6,000	$6,000	$6,000
010-690020	Bank Fees	$50	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000
010-690030	Advertisement	$10,000	$8,000	$10,000	$6,000	$4,000	$3,000	$3,000	$3,000	$3,000	$3,000
010-690040	Legal Fees	$3,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000
010-690050	Interest Expense	$0	$500	$500	$500	$500	$500	$500	$500	$500	$500
010-690100	Recreation Expense	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
010-700000	Miscellaneous Expense	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
010-810010	3 Rent Expense	$12,000	$90,000	$92,700	$95,481	$98,345	$101,296	$104,335	$107,465	$110,689	$114,009
010-810020	Electric/Gas/Water	$1,500	$3,600	$3,600	$3,600	$3,600	$3,600	$3,600	$3,600	$3,600	$3,600
010-810050	Building Insurance	$0	$7,500	$7,500	$7,500	$7,500	$7,500	$7,500	$7,500	$7,500	$7,500
010-810100	Building Maintenance/Repair	$500	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000
010-810200	Janitorial Supplies	$100	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000
	Total Expense	**$449,765**	**$473,034**	**$771,408**	**$1,023,921**	**$1,010,622**	**$1,116,356**	**$1,143,885**	**$1,171,962**	**$1,200,808**	**$1,230,444**
	Net Income before Debt Service	$235	$894	$691	$384	$170	$7,637	$171,762	$263,186	$347,078	$364,792
	Debt Service Estimate	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
	Net Income after Debt Service	**$235**	**$894**	**$691**	**$384**	**$170**	**$7,637**	**$171,762**	**$263,186**	**$347,078**	**$364,792**

	12-13 Proj	13-14 Proj	14-15 Proj	15-16 Proj	16-17 Proj	17-18 Proj	18-19 Proj	19-20 Proj	20-21 Proj	21-22 Proj
1 Staff Title	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation
Executive Director	$135,000	$138,645	$142,388	$146,233	$150,181	$154,236	$158,400	$162,677	$167,070	$171,580
Director of School Services	$0	$0	$0	$80,000	$82,160	$84,378	$86,657	$88,996	$91,399	$93,867
Director of Mangement Services	$0	$0	$0	$80,000	$82,160	$84,378	$86,657	$88,996	$91,399	$93,867
Director of Finances	$0	$0	$0	$0	$80,000	$82,160	$84,378	$86,657	$88,996	$91,399
Director of Human Capital	$0	$0	$0	$0	$80,000	$82,160	$84,378	$86,657	$88,996	$91,399
Director of Development	$0	$0	$0	$0	$0	$80,000	$82,160	$84,378	$86,657	$88,996
Director of IT	$0	$0	$80,000	$82,160	$84,378	$86,657	$88,996	$91,399	$93,867	$96,401
Principal for year 2013-14	$80,000	$0	$0	$0	$0	$0	$0	$0	$0	$0
Principal for year 2015-16	$0	$0	$80,000	$0	$0	$0	$0	$0	$0	$0
Principal for year 2016-17	$0	$0	$0	$80,000	$0	$0	$0	$0	$0	$0
IT Technicians	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Administrative Assistant	$0	$0	$32,000	$32,864	$33,751	$34,663	$35,599	$36,560	$37,547	$38,561
	$215,000	$138,645	$334,388	$501,257	$592,631	$688,632	$707,225	$726,320	$745,931	$766,071
Consulting										
Finance Consultant / Bookkeeper	$10,000	$20,000	$20,000	$40,000	$0	$0	$0	$0	$0	$0
Development Manager / Grant Writer	$0	$20,000	$20,540	$21,095	$21,664	$0	$0	$0	$0	$0
HR Consultant	$25,000	$25,675	$26,368	$27,080	$0	$0	$0	$0	$0	$0
IT Consultant	$0	$40,000								
Educational Elements	$40,000		$40,000	$40,000						
APQC Membership				$5,000	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000
IFF	$20,000									
	$95,000	$105,675	$106,908	$133,175	$26,664	$5,000	$5,000	$5,000	$5,000	$5,000
4 Professional Development										
National Charter Schools Conference	$ 5,000									
Misc	$ 5,000	$10,000	$15,000	$15,000	$15,000	$15,000	$15,000	$15,000	$15,000	$15,000
School Spring - Recruiting Website		$100	$250	$250	$500	$500	$500	$500	$500	$500
	$ 10,000	$ 10,100	$ 15,250	$ 15,250	$ 15,500	$ 15,500	$ 15,500	$ 15,500	$ 15,500	$ 15,500
5 Rent @ $10/square foot and heating @ $5/square foot										
Travel										
Executive Director	$ -	$ 4,800	$ 4,800	$ 4,800	$ 4,800	$ 4,800	$ 4,800	$ 4,800	$ 4,800	$ 4,800
Director of School Services			$ -	$ 2,400	$ 2,400	$ 2,400	$ 2,400	$ 2,400	$ 2,400	$ 2,400
Director of Mangement Services			$ -	$ 2,400	$ 2,400	$ 2,400	$ 2,400	$ 2,400	$ 2,400	$ 2,400
Director of Finances				$ -	$ 2,400	$ 2,400	$ 2,400	$ 2,400	$ 2,400	$ 2,400
Director of Human Capital				$ -	$ 2,400	$ 2,400	$ 2,400	$ 2,400	$ 2,400	$ 2,400
Director of Development					$ -	$ 2,400	$ 2,400	$ 2,400	$ 2,400	$ 2,400
Director of IT			$ 3,600	$ 3,600	$ 3,600	$ 3,600	$ 3,600	$ 3,600	$ 3,600	$ 3,600
Principal for year 2013-14	$ 19,840									
Principal for year 2015-16			$ 20,435							
Principal for year 2016-17				$ 21,048						
Administrative Assistant										
	$ 19,840	$ 4,800	$ 28,835	$ 34,248	$ 18,000	$ 20,400	$ 20,400	$ 20,400	$ 20,400	$ 20,400
Principal Intern Travel (used in calculations above)										
# of Trips	8									
Airfare	600									
Food for 13 days	585									
Extended Stay 13 days	845									
Car & Gas for 13 days	450									
SaaS										
WebHelpDesk		$ 2,500	$ 2,575	$ 2,652	$ 2,732	$ 2,814	$ 2,898	$ 2,985	$ 3,075	$ 3,167
PowerSchool		$ 5,000	$ 3,500	$ 5,000	$ 5,150	$ 5,305	$ 5,464	$ 5,628	$ 5,796	$ 5,970
HRIS Platform		$ -	$ -	$ 10,000	$ 5,000	$ 5,150	$ 5,305	$ 5,464	$ 5,628	$ 5,796
School Spring - Recruiting Website		$ 600	$ 1,250	$ 1,300	$ 2,000	$ 2,300	$ 2,500	$ 2,500	$ 2,500	$ 2,500
	$ -	$ 8,100	$ 7,325	$ 18,952	$ 14,882	$ 15,568	$ 16,166	$ 16,576	$ 16,999	$ 17,434

	13-14 Projected	14-15 Projected	15-16 Projected	16-17 Projected	17-18 Projected	18-19 Projected	19-20 Projected	20-21 Projected	21-22 Projected
School 1									
School Revenue	1,821,775	2,087,315	2,556,354	2,724,893	3,107,361	3,446,544	3,410,575	3,410,680	3,410,680
School Expenses	1,770,720	2,075,891	2,511,256	2,685,347	3,010,953	3,246,790	3,273,610	3,292,306	3,292,306
Net Operating Revenue	51,056	11,423	45,098	39,546	96,409	199,754	136,965	118,374	118,374
School 2									
School Revenue	0	0	1,821,775	2,087,315	2,556,354	2,724,893	3,107,361	3,446,544	3,410,575
School Expenses	0	0	1,796,725	2,078,554	2,507,420	2,689,187	3,026,131	3,263,350	3,273,599
Net Operating Revenue	0	0	25,051	8,760	48,934	35,706	81,230	183,194	136,977
School 3									
School Revenue	0	0	0	1,821,775	2,091,315	2,560,354	2,728,893	3,111,361	3,450,544
School Expenses	0	0	0	1,819,887	2,082,240	2,539,742	2,693,278	3,047,417	3,275,981
Net Operating Revenue	0	0	0	1,888	9,075	20,612	35,616	63,944	174,563
All School Revenues	1,821,775	2,087,315	4,378,129	6,633,983	7,755,030	8,731,791	9,246,830	9,968,586	10,271,800
All School Expenses	1,770,720	2,075,891	4,307,981	6,583,789	7,600,613	8,475,718	8,993,019	9,603,073	9,841,886
All School Net Revenues	51,056	11,423	70,148	50,194	154,417	256,073	253,811	365,513	429,914
Network Revenue from Tuition	1,399,500	1,959,300	3,864,175	6,274,425	7,751,675	9,073,425	9,897,575	10,675,075	11,001,625
Student Count @ 100% Enrollment									
School 1	180	252	317	375	428	475	470	470	470
School 2	0	0	180	252	317	375	428	475	470
School 3	0	0	0	180	252	317	375	428	475
	180	*252*	*497*	*807*	*997*	*1,167*	*1,273*	*1,373*	*1,415*
Student Count @ 85% Enrollment									
School 1	153	214	269	319	364	404	400	400	400
School 2	0	0	153	214	269	319	364	404	400
School 3	0	0	0	153	153	153	153	153	153
	153	*214*	*422*	*686*	*786*	*876*	*916*	*956*	*952*

	12-13 Proj	13-14 Proj	14-15 Proj	15-16 Proj	16-17 Proj	17-18 Proj	18-19 Proj	19-20 Proj	20-21 Proj	21-22 Proj
School 1										
School Tax	0	202,928	284,099	357,378	422,766	482,517	535,503	529,866	529,866	529,866
School 2										
School Tax	0	0	0	202,928	284,099	357,378	422,766	482,517	535,503	529,866
School 3										
School Tax	0	0	0	0	202,928	284,099	357,378	422,766	482,517	535,503
Total School Taxes	0	202,928	284,099	560,305	909,792	1,123,993	1,315,647	1,435,148	1,547,886	1,595,236
CoS Expenses	437,165	367,854	660,470	877,279	874,234	940,952	976,368	1,005,019	1,018,909	1,033,044
Taxes - CoS Expenses	(437,165)	(164,927)	(376,372)	(316,974)	35,557	183,041	339,279	430,130	528,977	562,191
Restricted Donations	450,000	271,000	488,000	464,000	101,000	0	0	0	0	0
Taxes + Donations - Expenses	12,835	106,073	111,628	147,026	136,557	183,041	339,279	430,130	528,977	562,191
Per Pupil Expenses	N/A	2,044	2,621	1,765	1,083	944	837	789	742	730
Student Count										
School 1	*0*	*180*	*252*	*317*	*375*	*428*	*475*	*470*	*470*	*470*
School 2	*0*	*0*	*0*	*180*	*252*	*317*	*375*	*428*	*475*	*470*
School 3	*0*	*0*	*0*	*0*	*180*	*252*	*317*	*375*	*428*	*475*
	0	*180*	*252*	*497*	*807*	*997*	*1,167*	*1,273*	*1,373*	*1,415*
Student Count @ 85% Enrollment										
School 1	*0*	*153*	*214*	*269*	*319*	*364*	*404*	*400*	*400*	*400*
School 2	*0*	*0*	*0*	*153*	*214*	*269*	*319*	*364*	*404*	*400*
School 3	*0*	*0*	*0*	*153*	*153*	*153*	*153*	*153*	*153*	*153*
	0	*153*	*214*	*575*	*686*	*786*	*876*	*916*	*956*	*952*

Quest-Milwauke 6th thru 12th Grade School
8 Year Projected Budget @ 85%

		13-14 Proj Budget	14-15 Proj Budget	15-16 Proj Budget	16-17 Proj Budget	17-18 Proj Budget	18-19 Proj Budget	19-20 Proj Budget	20-21 Proj Budget	
Student Count		153	214	269	319	364	404	400	400	
Per Pupil Revenue Before Network Tax		7,775	7,775	7,775	7,775	7,775	7,775	7,775	7,775	
Per Pupil Revenue After Network Tax		6,648	6,648	6,648	6,648	6,648	6,648	6,648	6,648	
Ledger #	**Operating Revenues**									
041-400001	Tuition - State	$1,017,087	$1,423,921	$1,791,203	$2,118,930	$2,418,406	$2,683,979	$2,655,726	$2,655,726	1
041-400002	Lunch Revenue	$11,016	$15,422	$19,400	$22,950	$26,194	$29,070	$28,764	$28,764	8
041-400005	Lunch Program Reibursement	$99,144	$138,802	$174,604	$206,550	$235,742	$261,630	$258,876	$258,876	8
041-400010	Title I & II	$130,050	$182,070	$229,033	$270,938	$309,230	$343,188	$339,575	$339,575	2
041-400015	Special Education EE Reimburse	$7,169	$7,265	$7,363	$7,463	$7,564	$7,666	$7,769	$7,874	
041-400020	IDEA Flow Through	$41,310	$57,834	$72,752	$86,063	$98,226	$109,013	$107,865	$107,865	
041-400050	Uniforms	$8,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	
041-400100	Field Trips	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	
041-400101	Miscellaneous Income	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000	
041-500010	Restricted DPI Implementation Grant	$250,000	$250,000	$250,000	$0	$0	$0	$0	$0	
041-500011	Restricted Walton Grant	$250,000	$0	$0	$0	$0	$0	$0	$0	
041-500012	Donations	$0	$0	$0	$0	$0	$0	$0	$0	
041-500013	Donations - Restricted	$0	$0	$0	$0	$0	$0	$0	$0	
041-500014	Donations - Unrestricted	$0	$0	$0	$0	$0	$0	$0	$0	
	Net Operating Revenue	$1,821,775	$2,087,315	$2,556,354	$2,724,893	$3,107,361	$3,446,544	$3,410,575	$3,410,680	
	Operating Expense									
041-600000	Salary Expense	$465,000	$586,278	$854,192	$919,724	$1,077,140	$1,121,682	$1,136,824	$1,152,171	3
041-610010	Employer Tax Expense	$44,175	$55,696	$81,148	$87,374	$102,328	$106,560	$107,998	$109,456	6
041-610020	Health Insurance	$74,400	$93,804	$136,671	$147,156	$172,342	$179,469	$181,892	$184,347	6
041-610030	Dental Insurance	$9,300	$11,726	$17,084	$18,394	$21,543	$22,434	$22,736	$23,043	6
041-610040	Life Insurance	$4,650	$5,863	$8,542	$9,197	$10,771	$11,217	$11,368	$11,522	6
041-620010	Accountant/Audit Fees	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	
041-620050	Professional Development	$23,500	$18,500	$7,500	$7,500	$7,500	$7,500	$7,500	$7,500	4
041-620100	Consulting Expense	$5,000	$0	$5,000	$5,000	$5,000	$20,000	$20,000	$20,000	
041-620500	Outside Services - Restricted	$0	$0	$0	$0	$0	$0	$0	$0	
041-630010	Transportation	$15,000	$7,500	$15,000	$15,000	$15,000	$15,000	$15,000	$12,000	
041-640000	Property Taxes	$0	$0	$0	$0	$0	$0	$0	$0	
041-640010	Telephone	$9,500	$9,500	$9,500	$9,500	$9,500	$9,500	$9,500	$9,500	
041-640020	Cable	$3,700	$3,700	$3,700	$3,700	$3,700	$3,700	$3,700	$3,700	
041-650000	Copier Expense	$15,000	$15,000	$15,000	$15,000	$15,000	$15,000	$15,000	$15,000	
041-650020	Printing	$4,500	$4,500	$4,500	$4,500	$4,500	$4,500	$4,500	$4,500	
041-650030	Postage	$2,000	$4,000	$6,000	$6,000	$6,000	$6,000	$6,000	$6,000	
041-650050	Office Supplies	$5,000	$5,000	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	
041-660010	Office/Classroom Furniture	$70,853	$70,689	$49,277	$40,776	$38,824	$34,459	$10,000	$5,000	7
041-660100	Computer Equipment	$49,220	$51,408	$64,668	$49,780	$45,904	$42,232	$29,380	$18,568	10
041-680010	Uniform Expense	$8,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	
041-680050	Technology Upgrades	$0	$0	$2,500	$2,500	$2,500	$2,500	$2,500	$2,500	
041-680100	Classroom Curriculum/Supplies	$10,000	$5,000	$10,000	$10,000	$10,000	$10,000	$10,000	$8,000	
041-680120	Dues and Subscriptions	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	
041-680150	Field Trip Expense	$5,000	$3,000	$7,500	$7,500	$10,000	$10,000	$10,000	$10,000	
041-680200	Lunch Expense	$123,930	$173,502	$218,255	$258,188	$294,678	$327,038	$323,595	$323,595	8
041-680500	Scholarships	$0	$0	$0	$0	$0	$5,000	$5,000	$5,000	
041-680510	College Expense - Restricted	$0	$0	$0	$0	$0	$81,327	$80,471	$80,471	9
041-681000	SaaS Expenses	$99,000	$152,440	$191,115	$225,625	$257,160	$285,125	$282,150	$282,150	11
041-690010	Insurance	$13,000	$13,000	$13,000	$13,000	$13,000	$13,000	$13,000	$13,000	6
041-690020	Bank Fees	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	
041-690030	Advertisement	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	
041-690040	Legal Fees	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	
041-690050	Interest Expense	$2,000	$2,000	$2,000	$2,000	$2,000	$2,000	$2,000	$2,000	
041-690100	Recreation Expense	$5,000	$500	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	
041-695000	Authorizer Fee	$23,792	$33,308	$41,899	$49,566	$56,571	$62,783	$62,122	$62,122	
041-700000	Miscellaneous Expense	$4,000	$2,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	
041-800000	Facility Fee	$658,200	$725,978	$701,205	$732,368	$783,990	$802,766	$855,373	$875,160	5
	Total Expense	$1,770,720	$2,075,891	$2,511,256	$2,685,347	$3,010,953	$3,246,790	$3,273,610	$3,292,306	
	Net Income before Debt Service	$51,056	$11,423	$45,098	$39,546	$96,409	$199,754	$136,965	$118,374	
	Debt Service Estimate	$0	$0	$0	$0	$0	$0	$0	$0	
	Net Income after Debt Service	$51,056	$11,423	$45,098	$39,546	$96,409	$199,754	$136,965	$118,374	

School 1 Notes @ 85%	13-14 Proj	14-15 Proj	15-16 Proj	16-17 Proj	17-18 Proj	18-19 Proj	19-20 Proj	20-21 Proj
Student Count (previous page)	153	214	269	319	364	404	400	400

1 Assumes the current $7,775 per student funding for 2R charter schools, less the anticipated network tax to cover the Center of Support Costs

2 Title I + Title II funding is based on a per pupil of $850

3 Staff Title	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation
Director	$ 80,000	$ 81,080	$ 82,175	$ 83,284	$ 84,408	$ 85,548	$ 86,703	$ 87,873
Dean of Students Lower		$ 60,000	$ 60,810	$ 61,631	$ 62,463	$ 63,306	$ 64,161	$ 65,027
Dean of Students Upper					$ 60,000	$ 60,810	$ 61,631	$ 62,463
Curriculum Coach		$ 55,000	$ 55,743	$ 56,495	$ 57,258	$ 58,031	$ 58,814	$ 59,608
ELA Teacher	$ 50,000	$ 50,675	$ 51,359	$ 52,052	$ 52,755	$ 53,467	$ 54,189	$ 54,921
Math Teacher	$ 50,000	$ 50,675	$ 51,359	$ 52,052	$ 52,755	$ 53,467	$ 54,189	$ 54,921
Science Teacher	$ 50,000	$ 50,675	$ 51,359	$ 52,052	$ 52,755	$ 53,467	$ 54,189	$ 54,921
Social Studies Teacher	$ 50,000	$ 50,675	$ 51,359	$ 52,052	$ 52,755	$ 53,467	$ 54,189	$ 54,921
Physical Education Teacher	$ 25,000	$ 25,338	$ 25,680	$ 26,026	$ 26,378	$ 26,734	$ 27,095	$ 27,460
PT Arts and Humanities	$ 25,000	$ 25,338	$ 25,680	$ 26,026	$ 26,378	$ 26,734	$ 27,095	$ 27,460
ELA Teacher			$ 50,000	$ 50,675	$ 51,359	$ 52,052	$ 52,755	$ 53,467
Math Teacher			$ 50,000	$ 50,675	$ 51,359	$ 52,052	$ 52,755	$ 53,467
Science Teacher			$ 50,000	$ 50,675	$ 51,359	$ 52,052	$ 52,755	$ 53,467
Social Studies Teacher			$ 50,000	$ 50,675	$ 51,359	$ 52,052	$ 52,755	$ 53,467
Physical Education Teacher				$ -	$ -	$ -	$ -	$ -
PT Arts and Humanities	$ -	$ -		$ 24,000	$ 24,324	$ 24,652	$ 24,985	$ 25,322
Instructional Advisor 1	$ 30,000	$ 30,405	$ 30,815	$ 31,231	$ 31,653	$ 32,080	$ 32,514	$ 32,952
Instructional Advisor 2	$ -		$ 30,000	$ 30,405	$ 30,815	$ 31,231	$ 31,653	$ 32,080
Instructional Advisor 3			$ 30,000	$ 30,405	$ 30,815	$ 31,231	$ 31,653	$ 32,080
Instructional Advisor 4				$ 30,000	$ 30,405	$ 30,815	$ 31,231	$ 31,653
Instructional Advisor 5					$ 30,000	$ 30,405	$ 30,815	$ 31,231
Instructional Advisor 6						$ 30,000	$ 30,405	$ 30,815
Academic Counselor	$ 25,000	$ 25,338	$ 25,680	$ 26,026	$ 26,378	$ 26,734	$ 27,095	$ 27,460
Academic Counselor - College Focus					$ 55,000	$ 55,743	$ 56,495	$ 57,258
Special Ed Teacher	$ 22,500	$ 22,804	$ 23,112	$ 23,424	$ 23,740	$ 24,060	$ 24,385	$ 24,714
Secretary	$ 35,000	$ 35,473	$ 35,951	$ 36,437	$ 36,929	$ 37,427	$ 37,932	$ 38,445
IT Technician	$ 22,500	$ 22,804	$ 23,112	$ 23,424	$ 23,740	$ 24,060	$ 24,385	$ 24,714
	$ 465,000	$ 586,278	$ 854,192	$ 919,724	$ 1,077,140	$ 1,121,682	$ 1,136,824	$ 1,152,171
4 Professional Development								
Project Based Learning - Instruction	$ 8,500	$ 8,500						
Project Based Learning - Coaching and OD	$ 7,500	$ 7,500						
Edmodo integration	$ 5,000							
PowerSchool On-Line PD	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500
Misc.			$ 5,000	$ 5,000	$ 5,000	$ 5,000	$ 5,000	$ 5,000
	$ 23,500	$ 18,500	$ 7,500	$ 7,500	$ 7,500	$ 7,500	$ 7,500	$ 7,500

5 Is included on the Facilities Tab

6 Uses multiples listed on 'Variables' tab

7 Classroom / Office Furniture								
Principal's and Dean's Desk	$ 650	$ 650			$ 650			
Classroom Teacher's Desks	$ 2,560		$ 2,560					
Secretaries Desks	$ 593							
Counselor's Desk	$ 593							
Academic Advisors Desks	$ 593		$ 593	$ 593	$ 593			
Student Chairs	$ 9,794	$ 4,394	$ 2,058	$ 1,836	$ 1,678	$ 1,488		
Student Workstations	$ 46,512	$ 50,613	$ 31,769	$ 28,348	$ 25,904	$ 22,971		
Round Tables	$ 1,450	$ 1,450						
Classroom Tables	$ 2,033	$ 2,033						
Misc Furniture		$ 6,149	$ 12,298					
Service	$ 6,075	$ 5,400						
Furniture Replacement				$ 10,000	$ 10,000	$ 10,000	$ 10,000	$ 5,000
	$ 70,853	$ 70,689	$ 49,277	$ 40,776	$ 38,824	$ 34,459	$ 10,000	$ 5,000

8 Lunch Program								
Revenue	$ 11,016	$ 15,422	$ 19,400	$ 22,950	$ 26,194	$ 29,070	$ 28,764	$ 28,764
Reimbursement	$ 99,144	$ 138,802	$ 174,604	$ 206,550	$ 235,742	$ 261,630	$ 258,876	$ 258,876
Service Cost	$ 123,930	$ 173,502	$ 218,255	$ 258,188	$ 294,678	$ 327,038	$ 323,595	$ 323,595

9 College Expenses								
Cost per AP Test = $87								
50% of seniors taking 3 AP Tests						$ 15,054	$ 14,896	$ 14,896
2011 MATC Course = $383								
50% of seniors dual enrolling at MATC in 3 courses per year						$ 66,273	$ 65,575	$ 65,575
Total Restricted College Expenses	$ -	$ -	$ -	$ -	$ -	$ 81,327	$ 80,471	$ 80,471

10 Computer Equipment								
Content Server	$ 2,500	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Chromebook Laptops	$ 36,720	$ 51,408	$ 64,668	$ 39,780	$ 35,904	$ 32,232	$ 19,380	$ 8,568
Replacement Laptops				$ 10,000	$ 10,000	$ 10,000	$ 10,000	$ 10,000
Networking Equipment	$ 10,000	$ -	$ -	$ -	$ -	$ -	$ -	$ -
	$ 49,220	$ 51,408	$ 64,668	$ 49,780	$ 45,904	$ 42,232	$ 29,380	$ 18,568

11 Software as a Service (SaaS)								
Instructional platforms	$ 76,500	$ 128,520	$ 161,670	$ 191,250	$ 218,280	$ 242,250	$ 239,700	$ 239,700
Project Foundry	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500
Educational Elements Single Sign-on	$ 20,000	$ 21,420	$ 26,945	$ 31,875	$ 36,380	$ 40,375	$ 39,950	$ 39,950
	$ 99,000	$ 152,440	$ 191,115	$ 225,625	$ 257,160	$ 285,125	$ 282,150	$ 282,150

Quest School 2 - 6th thru 12th Grade School
8 Year Projected Budget @ 85%

		15-16 Proj Budget	16-17 Proj Budget	17-18 Proj Budget	18-19 Proj Budget	19-20 Proj Budget	20-21 Proj Budget	21-22 Proj Budget	22-23 Proj Budget	
Student Count		153	214	269	319	364	404	400	400	
Per Pupil Revenue Before Network Tax		7,775	7,775	7,775	7,775	7,775	7,775	7,775	7,775	
Per Pupil Revenue After Network Tax		6,648	6,648	6,648	6,648	6,648	6,648	6,648	6,648	
Ledger #	**Operating Revenues**									
042-400001	Tuition - State	$1,017,087	$1,423,921	$1,791,203	$2,118,930	$2,418,406	$2,683,979	$2,655,726	$2,655,726	1
042-400002	Lunch Revenue	$11,016	$15,422	$19,400	$22,950	$26,194	$29,070	$28,764	$28,764	8
042-400005	Lunch Program Reibursement	$99,144	$138,802	$174,604	$206,550	$235,742	$261,630	$258,876	$258,876	8
042-400010	Title I & II	$130,050	$182,070	$229,033	$270,938	$309,230	$343,188	$339,575	$339,575	2
042-400015	Special Education EE Reimburse	$7,169	$7,265	$7,363	$7,463	$7,564	$7,666	$7,769	$7,874	
042-400020	IDEA Flow Through	$41,310	$57,834	$72,752	$86,063	$98,226	$109,013	$107,865	$107,865	
042-400050	Uniforms	$8,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	
042-400100	Field Trips	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	
042-400101	Miscellaneous Income	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000	
042-500010	Restricted DPI Implementation Grant	$250,000	$250,000	$250,000	$0	$0	$0	$0	$0	
042-500011	Restricted Walton Grant	$250,000	$0	$0	$0	$0	$0	$0	$0	
042-500012	Donations	$0	$0	$0	$0	$0	$0	$0	$0	
042-500013	Donations - Restricted	$0	$0	$0	$0	$0	$0	$0	$0	
042-500014	Donations - Unrestricted	$0	$0	$0	$0	$0	$0	$0	$0	
	Net Operating Revenue	$1,821,775	$2,087,315	$2,556,354	$2,724,893	$3,107,361	$3,446,544	$3,410,575	$3,410,680	
	Operating Expense									
042-600000	Salary Expense	$465,000	$586,278	$854,192	$919,724	$1,077,140	$1,121,682	$1,136,824	$1,152,171	3
042-610010	Employer Tax Expense	$44,175	$55,696	$81,148	$87,374	$102,328	$106,560	$107,998	$109,456	6
042-610020	Health Insurance	$74,400	$93,804	$136,671	$147,156	$172,342	$179,469	$181,892	$184,347	
042-610030	Dental Insurance	$9,300	$11,726	$17,084	$18,394	$21,543	$22,434	$22,736	$23,043	6
042-610040	Life Insurance	$4,650	$5,863	$8,542	$9,197	$10,771	$11,217	$11,368	$11,522	6
042-620010	Accountant/Audit Fees	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	
042-620050	Professional Development	$10,500	$15,600	$17,500	$17,500	$17,500	$17,500	$17,500	$17,500	4
042-620100	Consulting Expense	$5,000	$5,000	$0	$3,000	$5,000	$20,000	$20,000	$20,000	
042-620500	Outside Services - Restricted	$0	$0	$0	$0	$0	$0	$0	$0	
042-630010	Transportation	$15,000	$10,000	$7,500	$15,000	$15,000	$15,000	$15,000	$15,000	
042-640000	Property Taxes	$0	$0	$0	$0	$0	$0	$0	$0	
042-640010	Telephone	$9,500	$9,500	$9,500	$9,500	$9,500	$9,500	$9,500	$9,500	
042-640020	Cable	$3,700	$3,700	$3,700	$3,700	$3,700	$3,700	$3,700	$3,700	
042-650000	Copier Expense	$15,000	$15,000	$15,000	$15,000	$15,000	$15,000	$15,000	$15,000	
042-650020	Printing	$4,500	$4,500	$4,500	$4,500	$4,500	$4,500	$4,500	$4,500	
042-650030	Postage	$2,000	$4,000	$6,000	$6,000	$6,000	$6,000	$6,000	$6,000	
042-650050	Office Supplies	$5,000	$8,000	$5,000	$8,000	$10,000	$10,000	$10,000	$10,000	
042-660010	Office/Classroom Furniture	$70,853	$71,282	$16,101	$10,593	$10,000	$10,000	$10,000	$10,000	7
042-660100	Computer Equipment	$49,220	$51,408	$64,668	$49,780	$45,904	$42,232	$29,380	$18,568	10
042-680000	Uniform Expense	$8,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	
042-680050	Technology Upgrades	$0	$0	$0	$2,500	$2,500	$2,500	$2,500	$2,500	
042-680100	Classroom Curriculum/Supplies	$10,000	$10,000	$5,000	$10,000	$10,000	$10,000	$10,000	$10,000	
042-680120	Dues and Subscriptions	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	
042-680150	Field Trip Expense	$5,000	$5,000	$5,000	$5,000	$10,000	$10,000	$10,000	$5,000	
042-680200	Lunch Expense	$123,930	$173,502	$218,255	$258,188	$294,678	$327,038	$323,595	$323,595	8
042-680500	Scholarships	$0	$0	$0	$0	$0	$5,000	$5,000	$5,000	
042-680510	College Expense - Restricted	$0	$0	$0	$0	$0	$81,327	$80,471	$80,471	9
042-681000	SaaS Expenses	$99,000	$131,020	$164,170	$193,750	$220,780	$244,750	$242,200	$242,200	11
042-690010	Insurance	$13,000	$13,000	$13,000	$13,000	$13,000	$13,000	$13,000	$13,000	6
042-690020	Bank Fees	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	
042-690030	Advertisement	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	
042-690040	Legal Fees	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	
042-690050	Interest Expense	$2,000	$2,000	$2,000	$2,000	$2,000	$2,000	$2,000	$2,000	
042-690100	Recreation Expense	$5,000	$5,000	$5,000	$5,000	$10,000	$10,000	$10,000	$5,000	
042-695000	Authorizer Fee	$23,792	$33,308	$41,899	$49,566	$56,571	$62,783	$62,122	$62,122	
042-700000	Miscellaneous Expense	$0	$0	$0	$1,000	$3,000	$3,000	$3,000	$3,000	
042-800000	Facility Fee	$701,205	$732,368	$783,990	$802,766	$855,373	$875,160	$886,312	$907,041	5
	Total Expense	$1,796,725	$2,078,554	$2,507,420	$2,689,187	$3,026,131	$3,263,350	$3,273,599	$3,293,237	
	Net Income before Debt Service	$25,051	$8,760	$48,934	$35,706	$81,230	$183,194	$136,977	$117,443	
	Debt Service Estimate	$0	$0	$0	$0	$0	$0	$0	$0	
	Net Income after Debt Service	$25,051	$8,760	$48,934	$35,706	$81,230	$183,194	$136,977	$117,443	

School 2 Notes @ 85%	15-16 Projected	16-17 Projected	17-18 Projected	18-19 Projected	19-20 Projected	20-21 Projected	21-22 Projected	22-23 Projected
Student Count (previous page)	153	214	269	319	364	404	400	400

1   Assumes the current $7,775 per student funding for 2R charter schools, less the anticipated network tax to cover the Center of Support Costs

2   Title I + Title II funding is based on a per pupil of $850

3 Staff Title

Staff Title	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation
Director	$ 80,000	$ 81,080	$ 82,175	$ 83,284	$ 84,408	$ 85,548	$ 86,703	$ 87,873
Dean of Students Lower		$ 60,000	$ 60,810	$ 61,631	$ 62,463	$ 63,306	$ 64,161	$ 65,027
Dean of Students Upper					$ 60,000	$ 60,810	$ 61,631	$ 62,463
Curriculum Coach		$ 55,000	$ 55,743	$ 56,495	$ 57,258	$ 58,031	$ 58,814	$ 59,608
ELA Teacher	$ 50,000	$ 50,675	$ 51,359	$ 52,052	$ 52,755	$ 53,467	$ 54,189	$ 54,921
Math Teacher	$ 50,000	$ 50,675	$ 51,359	$ 52,052	$ 52,755	$ 53,467	$ 54,189	$ 54,921
Science Teacher	$ 50,000	$ 50,675	$ 51,359	$ 52,052	$ 52,755	$ 53,467	$ 54,189	$ 54,921
Social Studies Teacher	$ 50,000	$ 50,675	$ 51,359	$ 52,052	$ 52,755	$ 53,467	$ 54,189	$ 54,921
Physical Education Teacher	$ 25,000	$ 25,338	$ 25,680	$ 26,026	$ 26,378	$ 26,734	$ 27,095	$ 27,460
PT Arts and Humanities	$ 25,000	$ 25,338	$ 25,680	$ 26,026	$ 26,378	$ 26,734	$ 27,095	$ 27,460
ELA Teacher			$ 50,000	$ 50,675	$ 51,359	$ 52,052	$ 52,755	$ 53,467
Math Teacher			$ 50,000	$ 50,675	$ 51,359	$ 52,052	$ 52,755	$ 53,467
Science Teacher			$ 50,000	$ 50,675	$ 51,359	$ 52,052	$ 52,755	$ 53,467
Social Studies Teacher			$ 50,000	$ 50,675	$ 51,359	$ 52,052	$ 52,755	$ 53,467
Physical Education Teacher				$ -	$ -	$ -	$ -	$ -
PT Arts and Humanities		$ -	$ -	$ 24,000	$ 24,324	$ 24,652	$ 24,985	$ 25,322
Instructional Advisor 1	$ 30,000	$ 30,405	$ 30,815	$ 31,231	$ 31,653	$ 32,080	$ 32,514	$ 32,952
Instructional Advisor 2	$ -		$ 30,000	$ 30,405	$ 30,815	$ 31,231	$ 31,653	$ 32,080
Instructional Advisor 3			$ 30,000	$ 30,405	$ 30,815	$ 31,231	$ 31,653	$ 32,080
Instructional Advisor 4				$ 30,000	$ 30,405	$ 30,815	$ 31,231	$ 31,653
Instructional Advisor 5					$ 30,000	$ 30,405	$ 30,815	$ 31,231
Instructional Advisor 6						$ 30,000	$ 30,405	$ 30,815
Academic Counselor	$ 25,000	$ 25,338	$ 25,680	$ 26,026	$ 26,378	$ 26,734	$ 27,095	$ 27,460
Academic Counselor - College Focus					$ 55,000	$ 55,743	$ 56,495	$ 57,258
Special Ed Teacher	$ 22,500	$ 22,804	$ 23,112	$ 23,424	$ 23,740	$ 24,060	$ 24,385	$ 24,714
Secretary	$ 35,000	$ 35,473	$ 35,951	$ 36,437	$ 36,929	$ 37,427	$ 37,932	$ 38,445
IT Technician	$ 22,500	$ 22,804	$ 23,112	$ 23,424	$ 23,740	$ 24,060	$ 24,385	$ 24,714
	$ 465,000	$ 586,278	$ 854,192	$ 919,724	$ 1,077,140	$ 1,121,682	$ 1,136,824	$ 1,152,171

4 Professional Development

Project Based Learning - Instruction	$ 4,250	$ 4,350						
Project Based Learning - Coaching and OD	$ 3,750	$ 3,750						
PowerSchool On-Line PD	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500
Misc.		$ 5,000	$ 15,000	$ 15,000	$ 15,000	$ 15,000	$ 15,000	$ 15,000
	$ 10,500	$ 15,600	$ 17,500	$ 17,500	$ 17,500	$ 17,500	$ 17,500	$ 17,500

5 Is included on the Facilities Tab

6 Uses multiples listed on 'Variables' tab

7 Classroom / Office Furniture

Principal's and Dean's Desk	$ 650	$ 650	$ 650					
Classroom Teacher's Desks	$ 2,560		$ 2,560					
Secretaries Desks	$ 593							
Counselor's Desk	$ 593							
Academic Advisors Desks	$ 593	$ 593	$ 593	$ 593				
Student Chairs	$ 9,794	$ 4,394	$ -	$ -	$ -	$ -	$ -	
Student Workstations	$ 46,512	$ 50,613	$ -	$ -	$ -	$ -	$ -	
Round Tables	$ 1,450	$ 1,450						
Classroom Tables	$ 2,033	$ 2,033						
Misc Furniture		$ 6,149	$ 12,298					
Service	$ 6,075	$ 5,400						
Furniture Replacement				$ 10,000	$ 10,000	$ 10,000	$ 10,000	$ 10,000
	$ 70,853	$ 71,282	$ 16,101	$ 10,593	$ 10,000	$ 10,000	$ 10,000	$ 10,000

8 Lunch Program

Revenue	$ 11,016	$ 15,422	$ 19,400	$ 22,950	$ 26,194	$ 29,070	$ 28,764	$ 28,764
Reimbursement	$ 99,144	$ 138,802	$ 174,604	$ 206,550	$ 235,742	$ 261,630	$ 258,876	$ 258,876
Service Cost	$ 123,930	$ 173,502	$ 218,255	$ 258,188	$ 294,678	$ 327,038	$ 323,595	$ 323,595

8 College Expenses

Cost per AP Test = $87								
50% of seniors taking 3 AP Tests						$ 15,054	$ 14,896	$ 14,896
2011 MATC Course = $383								
50% of seniors dual enrolling at MATC in 3 courses per year						$ 66,273	$ 65,575	$ 65,575
Total Restricted College Expenses	$ -	$ -	$ -	$ -	$ -	$ 81,327	$ 80,471	$ 80,471

9 Computer Equipment

Content Server	$ 2,500			$ -	$ -		$ -	$ -
Chromebook Laptops	$ 36,720	$ 51,408	$ 64,668	$ 39,780	$ 35,904	$ 32,232	$ 19,380	$ 8,568
Replacement Laptops				$ 10,000	$ 10,000	$ 10,000	$ 10,000	$ 10,000
Networking Equipment	$ 10,000	$ -	$ -	$ -	$ -	$ -	$ -	$ -
	$ 49,220	$ 51,408	$ 64,668	$ 49,780	$ 45,904	$ 42,232	$ 29,380	$ 18,568

Software as a Service (SaaS)

10 Instructional platforms	$ 76,500	$ 107,100	$ 134,725	$ 159,375	$ 181,900	$ 201,875	$ 199,750	$ 199,750
Project Foundry	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500
Educational Elements Single Sign-on	$ 20,000	$ 21,420	$ 26,945	$ 31,875	$ 36,380	$ 40,375	$ 39,950	$ 39,950
	$ 99,000	$ 131,020	$ 164,170	$ 193,750	$ 220,780	$ 244,750	$ 242,200	$ 242,200

Quest School 3 - 6th thru 12th Grade School
8 Year Projected Budget @ 85%

		16-17 Proj Budget	17-18 Proj Budget	18-19 Proj Budget	19-20 Proj Budget	20-21 Proj Budget	21-22 Proj Budget	22-23 Proj Budget	23-24 Proj Budget	
Student Count		153	214	269	319	364	404	404	404	
Per Pupil Revenue Before Network Tax		7,775	7,775	7,775	7,775	7,775	7,775	7,775	7,775	
Per Pupil Revenue After Network Tax		6,648	6,648	6,648	6,648	6,648	6,648	6,648	6,648	
Ledger #	**Operating Revenues**									
043-400001	Tuition - State	$1,017,087	$1,423,921	$1,791,203	$2,118,930	$2,418,406	$2,683,979	$2,683,979	$2,683,979	1
043-400002	Lunch Revenue	$11,016	$15,422	$19,400	$22,950	$26,194	$29,070	$29,070	$29,070	
043-400005	Lunch Program Reibursement	$99,144	$138,802	$174,604	$206,550	$235,742	$261,630	$261,630	$261,630	
043-400010	Title I & II	$130,050	$182,070	$229,033	$270,938	$309,230	$343,188	$343,188	$343,188	2
043-400015	Special Education EE Reimburse	$7,169	$7,265	$7,363	$7,463	$7,564	$7,666	$7,769	$7,874	
043-400020	IDEA Flow Through	$41,310	$57,834	$72,752	$86,063	$98,226	$109,013	$109,013	$109,013	
043-400050	Uniforms	$8,000	$8,000	$8,000	$8,000	$8,000	$8,000	$8,000	$8,000	
043-400100	Field Trips	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	
043-400101	Miscellaneous Income	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000	
043-500010	Restricted DPI Implementation Grant	$250,000	$250,000	$250,000	$0	$0	$0	$0	$0	
043-500011	Restricted Walton Grant	$250,000	$0	$0	$0	$0	$0	$0	$0	
043-500012	Donations	$0	$0	$0	$0	$0	$0	$0	$0	
043-500013	Donations - Restricted	$0	$0	$0	$0	$0	$0	$0	$0	
043-500014	Donations - Unrestricted	$0	$0	$0	$0	$0	$0	$0	$0	
	Net Operating Revenue	$1,821,775	$2,091,315	$2,560,354	$2,728,893	$3,111,361	$3,450,544	$3,450,648	$3,450,753	
	Operating Expense									
043-600000	Salary Expense	$465,000	$558,778	$853,450	$888,971	$1,075,972	$1,120,498	$1,135,625	$1,150,956	3
043-610010	Employer Tax Expense	$44,175	$53,084	$81,078	$84,452	$102,217	$106,447	$107,884	$109,341	6
043-610020	Health Insurance	$74,400	$89,404	$136,552	$142,235	$172,156	$179,280	$181,700	$184,153	6
043-610030	Dental Insurance	$9,300	$11,176	$17,069	$17,779	$21,519	$22,410	$22,712	$23,019	6
043-610040	Life Insurance	$4,650	$5,588	$8,534	$8,890	$10,760	$11,205	$11,356	$11,510	6
043-620010	Accountant/Audit Fees	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	
043-620050	Professional Development	$10,500	$10,500	$12,500	$12,500	$17,500	$17,500	$17,500	$17,500	4
043-620100	Consulting Expense	$0	$2,000	$5,000	$2,000	$5,000	$20,000	$20,000	$20,000	
043-620500	Outside Services - Restricted	$0	$0	$0	$0	$0	$0	$0	$0	
043-630010	Transportation	$15,000	$10,000	$9,000	$10,000	$15,000	$15,000	$15,000	$15,000	
043-640000	Property Taxes	$0	$0	$0	$0	$0	$0	$0	$0	
043-640010	Telephone	$9,500	$9,500	$9,500	$9,500	$9,500	$9,500	$9,500	$9,500	
043-640020	Cable	$3,700	$3,700	$3,700	$3,700	$3,700	$3,700	$3,700	$3,700	
043-650000	Copier Expense	$15,000	$15,000	$15,000	$15,000	$15,000	$15,000	$15,000	$15,000	
043-650020	Printing	$4,500	$4,500	$4,500	$4,500	$4,500	$4,500	$4,500	$4,500	
043-650030	Postage	$2,000	$4,000	$4,000	$6,000	$6,000	$6,000	$6,000	$6,000	
043-650050	Office Supplies	$5,000	$5,000	$8,000	$5,000	$10,000	$10,000	$10,000	$10,000	
043-660010	Office/Classroom Furniture	$70,853	$71,282	$16,101	$10,593	$10,000	$10,000	$10,000	$10,000	7
043-660100	Computer Equipment	$49,220	$51,408	$64,668	$49,780	$45,904	$42,232	$30,400	$19,588	10
043-680010	Uniform Expense	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	
043-680050	Technology Upgrades	$0	$2,500	$2,500	$2,500	$2,500	$2,500	$2,500	$2,500	
043-680100	Classroom Curriculum/Supplies	$8,000	$5,000	$8,000	$10,000	$10,000	$10,000	$10,000	$10,000	
043-680120	Dues and Subscriptions	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	
043-680150	Field Trip Expense	$5,000	$5,000	$7,500	$5,000	$10,000	$10,000	$10,000	$10,000	
043-680200	Lunch Expense	$123,930	$173,502	$218,255	$258,188	$294,678	$327,038	$327,038	$327,038	8
043-680500	Scholarships	$0	$0	$0	$0	$0	$5,000	$5,000	$5,000	
043-680510	College Expense - Restricted	$0	$0	$0	$0	$0	$81,327	$81,327	$81,327	9
043-681000	SaaS Expenses	$99,000	$131,020	$164,170	$193,750	$220,780	$244,750	$244,750	$244,750	11
043-690010	Insurance	$13,000	$13,000	$13,000	$13,000	$13,000	$13,000	$13,000	$13,000	6
043-690020	Bank Fees	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	
043-690030	Advertisement	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	
043-690040	Legal Fees	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	
043-690050	Interest Expense	$2,000	$2,000	$2,000	$2,000	$2,000	$2,000	$2,000	$2,000	
043-690100	Recreation Expense	$5,000	$5,000	$5,000	$5,000	$10,000	$10,000	$10,000	$10,000	
043-695000	Authorizer Fee	$23,792	$33,308	$41,899	$49,566	$56,571	$62,783	$62,783	$62,783	
043-700000	Miscellaneous Expense	$3,000	$1,000	$4,000	$6,000	$6,000	$6,000	$6,000	$6,000	
043-800000	Facility Fees	$732,368	$783,990	$802,766	$855,373	$875,160	$886,312	$907,041	$874,337	5
	Total Expense	$1,819,887	$2,082,240	$2,539,742	$2,693,278	$3,047,417	$3,275,981	$3,304,316	$3,280,500	
	Net Income before Debt Service	$1,888	$9,075	$20,612	$35,616	$63,944	$174,563	$146,332	$170,252	
	Debt Service Estimate	$0	$0	$0	$0	$0	$0	$0	$0	
	Net Income after Debt Service	$1,888	$9,075	$20,612	$35,616	$63,944	$174,563	$146,332	$170,252	

School 3 Notes @ 85%	16-17 Projected	17-18 Projected	18-19 Projected	19-20 Projected	20-21 Projected	21-22 Projected	22-23 Projected	23-24 Projected
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2   Title I + Title II funding is based on a per pupil of $850

3 Staff Title

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Dean of Students Upper					$ 60,000	$ 60,810	$ 61,631	$ 62,463
Curriculum Coach		$ 27,500	$ 55,000	$ 55,743	$ 56,495	$ 57,258	$ 58,031	$ 58,814
ELA Teacher	$ 50,000	$ 50,675	$ 51,359	$ 52,052	$ 52,755	$ 53,467	$ 54,189	$ 54,921
Math Teacher	$ 50,000	$ 50,675	$ 51,359	$ 52,052	$ 52,755	$ 53,467	$ 54,189	$ 54,921
Science Teacher	$ 50,000	$ 50,675	$ 51,359	$ 52,052	$ 52,755	$ 53,467	$ 54,189	$ 54,921
Social Studies Teacher	$ 50,000	$ 50,675	$ 51,359	$ 52,052	$ 52,755	$ 53,467	$ 54,189	$ 54,921
Physical Education Teacher	$ 25,000	$ 25,338	$ 25,680	$ 26,026	$ 26,378	$ 26,734	$ 27,095	$ 27,460
PT Arts and Humanities	$ 25,000	$ 25,338	$ 25,680	$ 26,026	$ 26,378	$ 26,734	$ 27,095	$ 27,460
ELA Teacher			$ 50,000	$ 50,675	$ 51,359	$ 52,052	$ 52,755	$ 53,467
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Science Teacher			$ 50,000	$ 50,675	$ 51,359	$ 52,052	$ 52,755	$ 53,467
Social Studies Teacher			$ 50,000	$ 50,675	$ 51,359	$ 52,052	$ 52,755	$ 53,467
Physical Education Teacher				$ -	$ -	$ -	$ -	$ -
PT Arts and Humanities	$ -	$ -		$ 24,000	$ 24,324	$ 24,652	$ 24,985	$ 25,322
Instructional Advisor 1	$ 30,000	$ 30,405	$ 30,815	$ 31,231	$ 31,653	$ 32,080	$ 32,514	$ 32,952
Instructional Advisor 2	$ -		$ 30,000	$ 30,405	$ 30,815	$ 31,231	$ 31,653	$ 32,080
Instructional Advisor 3			$ 30,000	$ 30,405	$ 30,815	$ 31,231	$ 31,653	$ 32,080
Instructional Advisor 4					$ 30,000	$ 30,405	$ 30,815	$ 31,231
Instructional Advisor 5					$ 30,000	$ 30,405	$ 30,815	$ 31,231
Instructional Advisor 6						$ 30,000	$ 30,405	$ 30,815
Academic Counselor	$ 25,000	$ 25,338	$ 25,680	$ 26,026	$ 26,378	$ 26,734	$ 27,095	$ 27,460
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IT Technician	$ 22,500	$ 22,804	$ 23,112	$ 23,424	$ 23,740	$ 24,060	$ 24,385	$ 24,714
	$ 465,000	$ 558,778	$ 853,450	$ 888,971	$ 1,075,972	$ 1,120,498	$ 1,135,625	$ 1,150,956

4 Professional Development

Project Based Learning - Instruction	$ 4,250	$ 4,250						
Project Based Learning - Coaching and OD	$ 3,750	$ 3,750						
PowerSchool On-Line PD	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500
Misc.			$ 10,000	$ 10,000	$ 15,000	$ 15,000	$ 15,000	$ 15,000
	$ 10,500	$ 10,500	$ 12,500	$ 12,500	$ 17,500	$ 17,500	$ 17,500	$ 17,500

5 Is included on the Facilities Tab

6 Uses multiples listed on 'Variables' tab

7 Classroom / Office Furniture

Principal's and Dean's Desk	$ 650	$ 650	$ 650					
Classroom Teacher's Desks	$ 2,560		$ 2,560					
Secretaries Desks	$ 593							
Counselor's Desk	$ 593							
Academic Advisors Desks	$ 593	$ 593	$ 593	$ 593				
Student Chairs	$ 9,794	$ 4,394	$ -	$ -	$ -	$ -	$ -	
Student Workstations	$ 46,512	$ 50,613	$ -	$ -	$ -	$ -	$ -	
Round Tables	$ 1,450	$ 1,450						
Classroom Tables	$ 2,033	$ 2,033						
Misc Furniture		$ 6,149	$ 12,298					
Service	$ 6,075	$ 5,400						
Furniture Replacement				$ 10,000	$ 10,000	$ 10,000	$ 10,000	$ 10,000
	$ 70,853	$ 71,282	$ 16,101	$ 10,593	$ 10,000	$ 10,000	$ 10,000	$ 10,000

8 Lunch Program

Revenue	$ 11,016	$ 15,422	$ 19,400	$ 22,950	$ 26,194	$ 29,070	$ 29,070	$ 29,070
Reimbursement	$ 99,144	$ 138,802	$ 174,604	$ 206,550	$ 235,742	$ 261,630	$ 261,630	$ 261,630
Service Cost	$ 123,930	$ 173,502	$ 218,255	$ 258,188	$ 294,678	$ 327,038	$ 327,038	$ 327,038

8 College Expenses

Cost per AP Test = $87

50% of seniors taking 3 AP Tests	$ -	$ -	$ -	$ -	$ -	$ 15,054	$ 15,054	$ 15,054
2011 MATC Course = $383								
50% of seniors dual enrolling at MATC in 3								

9 courses per year $ - $ - $ - $ - $ - $ 66,273 $ 66,273 $ 66,273

Total Restricted College Expenses	$ -	$ -	$ -	$ -	$ -	$ 81,327	$ 81,327	$ 81,327

Content Server	$ 2,500	$ -	$ -	$ -	$ -	$ -	$ -	$ -
10 Chromebook Laptops	$ 36,720	$ 51,408	$ 64,668	$ 39,780	$ 35,904	$ 32,232	$ 20,400	$ 9,588
Replacement Laptops				$ 10,000	$ 10,000	$ 10,000	$ 10,000	$ 10,000
Networking Equipment	$ 10,000	$ -	$ -	$ -	$ -	$ -	$ -	$ -
	$ 49,220	$ 51,408	$ 64,668	$ 49,780	$ 45,904	$ 42,232	$ 30,400	$ 19,588

Software as a Service (SaaS)

Instructional platforms	$ 76,500	$ 107,100	$ 134,725	$ 159,375	$ 181,900	$ 201,875	$ 201,875	$ 201,875
Project Foundry	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500
Educational Elements Single Sign-on	$ 20,000	$ 21,420	$ 26,945	$ 31,875	$ 36,380	$ 40,375	$ 40,375	$ 40,375
	$ 99,000	$ 131,020	$ 164,170	$ 193,750	$ 220,780	$ 244,750	$ 244,750	$ 244,750

	13-14 Proj Budget	14-15 Proj Budget	15-16 Proj Budget	16-17 Proj Budget	17-18 Proj Budget	18-19 Proj Budget	19-20 Proj Budget	20-21 Proj Budget	21-22 Proj
Operating Revenues									
School 1 Facility Fees	$632,500	$674,578	$692,116	$735,128	$803,627	$822,625	$842,135	$862,173	$882,752
School 2 Facility Fees			$632,500	$699,578	$717,116	$735,128	$803,627	$822,625	$842,135
School 3 Facility Fees				$632,500	$699,578	$717,116	$785,128	$803,627	$822,625
Net Operating Revenue	**$0**	**$0**	**$632,500**	**$1,332,078**	**$1,416,694**	**$1,452,244**	**$1,588,755**	**$1,626,251**	**$1,664,760**
Operating Expense									
School 1									
Rent Expense School 1	$400,000	$410,800	$421,892	$433,283	$444,981	$456,996	$469,335	$482,007	$495,021
Electric/Gas/Water School 1	$200,000	$205,400	$210,946	$216,641	$222,491	$228,498	$234,667	$241,003	$247,510
Building Insurance School 1	$7,500	$7,703	$7,910	$8,124	$8,343	$8,569	$8,800	$9,038	$9,282
Capital Reserves		$25,000	$25,000	$50,000	$100,000	$100,000	$100,000	$100,000	$100,000
Building Maintenance/Repair School 1	$15,000	$15,405	$15,821	$16,248	$16,687	$17,137	$17,600	$18,075	$18,563
Janitorial Supplies School 1	$10,000	$10,270	$10,547	$10,832	$11,125	$11,425	$11,733	$12,050	$12,376
	$632,500	**$674,578**	**$692,116**	**$735,128**	**$803,627**	**$822,625**	**$842,135**	**$862,173**	**$882,752**
School 2									
Rent Expense School 2			$400,000	$410,800	$421,892	$433,283	$444,981	$456,996	$469,335
Electric/Gas/Water School 2			$200,000	$205,400	$210,946	$216,641	$222,491	$228,498	$234,667
Building Insurance School 2			$7,500	$7,703	$7,910	$8,124	$8,343	$8,569	$8,800
Capital Reserves			$50,000	$50,000	$50,000	$50,000	$100,000	$100,000	$100,000
Building Maintenance/Repair School 2			$15,000	$15,405	$15,821	$16,248	$16,687	$17,137	$17,600
Janitorial Supplies School 2			$10,000	$10,270	$10,547	$10,832	$11,125	$11,425	$11,733
			$632,500	**$699,578**	**$717,116**	**$735,128**	**$803,627**	**$822,625**	**$842,135**
School 3									
Rent Expense School 3				$400,000	$410,800	$421,892	$433,283	$444,981	$456,996
Electric/Gas/Water School 3				$200,000	$205,400	$210,946	$216,641	$222,491	$228,498
Building Insurance School 3				$7,500	$7,703	$7,910	$8,124	$8,343	$8,569
Capital Reserves				$50,000	$50,000	$100,000	$100,000	$100,000	$100,000
Building Maintenance/Repair School 3				$15,000	$15,405	$15,821	$16,248	$16,687	$17,137
Janitorial Supplies School 3				$10,000	$10,270	$10,547	$10,832	$11,125	$11,425
				$632,500	**$699,578**	**$717,116**	**$785,128**	**$803,627**	**$822,625**
Custodial Wages	$20,000	$40,000	$60,540	$101,087	$102,452	$103,835	$105,237	$106,658	$86,710
Health Insurance	$3,200	$6,400	$9,686	$16,174	$16,392	$16,614	$16,838	$17,065	$13,874
Dental Insurance	$400	$800	$1,211	$2,022	$2,049	$2,077	$2,105	$2,133	$1,734
Life Insurance	$200	$400	$605	$1,011	$1,025	$1,038	$1,052	$1,067	$867
Employer Tax Expense	$1,900	$3,800	$5,751	$9,603	$9,733	$9,864	$9,998	$10,132	$8,237
	$25,700	**$51,400**	**$77,794**	**$129,897**	**$131,651**	**$133,428**	**$135,229**	**$137,055**	**$111,423**
Total Facilities Cost	$658,200	$725,978	$1,402,410	$2,197,103	$2,351,971	$2,408,297	$2,566,120	$2,625,479	$2,658,935

Facilities LLC Budget Notes @ 85%	13-14 Proj	14-15 Proj	15-16 Proj	16-17 Proj	17-18 Proj	18-19 Proj	19-20 Proj	20-21 Proj	21-22 Proj	22-23 Proj	23-24 Proj
Staff Title	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation
Custodian	$ 20,000	$ 40,000	$ 40,540	$ 41,087	$ 41,642	$ 42,204	$ 42,774	$ 43,351	$ 43,937	$ 44,530	$ 45,131
Custodian			$ 20,000	$ 40,000	$ 40,540	$ 41,087	$ 41,642	$ 42,204	$ 42,774	$ 43,351	$ 43,937
Custodian				$ 20,000	$ 20,270	$ 20,544	$ 20,821	$ 21,102			
	$ 20,000	$ 40,000	$ 60,540	$ 101,087	$ 102,452	$ 103,835	$ 105,237	$ 106,658	$ 86,710	$ 87,881	$ 89,067

			12-13 Proj	13-14 Proj	14-15 Proj	15-16 Proj	16-17 Proj	17-18 Proj	18-19 Proj	19-20 Proj	20-21 Proj	21-22 Proj
		Student Count	0	153	214.2	422.45	685.95	847.45	992	1,082	1,167	1,203
		Per Pupil Revenue Before Network Tax	7,775	7,775	7,775	7,775	7,775	7,775	7,775	7,775	7,775	7,775
		Per Pupil Network Tax	1,127	1,127	1,127	1,127	1,127	1,127	1,127	1,127	1,127	1,127
Ledger #		**Operating Revenues**										
010-410000		School Tax	$0	$172,488	$241,484	$476,260	$773,323	$955,394	$1,118,300	$1,219,876	$1,315,703	$1,355,950
010-500012		Donations	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
010-500013		Donations - Restricted	$450,000	$271,000	$488,000	$464,000	$101,000	$0	$0	$0	$0	$0
010-500014		Donations - Unrestricted	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
010-400101		Miscellaneous Income	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
		Net Operating Revenue	**$450,000**	**$443,488**	**$729,484**	**$940,260**	**$874,323**	**$955,394**	**$1,118,300**	**$1,219,876**	**$1,315,703**	**$1,355,950**
		Operating Expense										
010-600000	1	Salary Expense	$215,000	$136,823	$330,670	$414,054	$498,563	$585,294	$593,195	$601,204	$609,320	$617,546
010-610010		Employer Tax Expense	$20,425	$12,998	$31,414	$39,335	$47,364	$55,603	$56,354	$57,114	$57,885	$58,667
010-610020		Health Insurance	$34,400	$21,892	$52,907	$66,249	$79,770	$93,647	$94,911	$96,193	$97,491	$98,807
010-610030		Dental Insurance	$4,300	$2,736	$6,613	$8,281	$9,971	$11,706	$11,864	$12,024	$12,186	$12,351
010-610040		Life Insurance	$2,150	$1,368	$3,307	$4,141	$4,986	$5,853	$5,932	$6,012	$6,093	$6,175
010-620010		Accountant/Audit Fees	$6,000	$6,000	$6,000	$6,000	$6,000	$6,000	$6,000	$6,000	$6,000	$6,000
010-620050	2	Professional Development	$2,000	$10,100	$15,250	$250	$500	$500	$500	$15,500	$15,500	$15,500
010-620100	2	Consulting Expense	$95,000	$105,338	$105,950	$131,570	$52,199	$5,000	$5,000	$5,000	$5,000	$5,000
010-620500		Outside Services - Restricted	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
010-630010	5	Transportation	$19,840	$4,800	$28,835	$34,248	$3,600	$3,600	$20,400	$20,400	$20,400	$20,400
010-640000		Property Taxes	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
010-640010		Telephone	$2,500	$3,600	$3,600	$3,600	$3,600	$3,600	$3,600	$3,600	$3,600	$3,600
010-640020		Cable	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
010-650000		Copier Expense	$2,000	$10,000	$12,500	$12,500	$12,500	$12,500	$12,500	$12,500	$12,500	$12,500
010-650020		Printing	$2,000	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000
010-650030		Postage	$5,000	$5,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000
010-650050		Office Supplies	$2,000	$2,000	$3,000	$5,000	$2,000	$2,000	$5,000	$5,000	$5,000	$5,000
010-660010		Office/Classroom Furniture	$6,000	$5,000	$10,000	$10,000	$2,000	$2,000	$2,000	$2,000	$2,000	$2,000
010-660100		Computer Equipment	$500	$6,000	$9,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000
010-680050		Technology Upgrades	$0	$0	$0	$0	$0	$0	$2,000	$2,000	$2,000	$2,000
010-680120		Dues and Subscriptions	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000
010-681000	6	SaaS Expenses	$0	$8,100	$7,325	$18,952	$14,882	$15,568	$16,166	$16,576	$16,999	$17,434
010-690010		Insurance	$2,500	$4,000	$6,000	$6,000	$6,000	$6,000	$6,000	$6,000	$6,000	$6,000
010-690020		Bank Fees	$50	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000
010-690030		Advertisement	$10,000	$8,000	$10,000	$6,000	$4,000	$3,000	$3,000	$3,000	$3,000	$3,000
010-690040		Legal Fees	$3,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000
010-690050		Interest Expense	$0	$500	$500	$500	$500	$500	$500	$500	$500	$500
010-690100		Recreation Expense	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
010-700000		Miscellaneous Expense	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
010-810010	3	Rent Expense	$0	$0	$0	$90,000	$92,700	$95,481	$98,345	$101,296	$104,335	$107,465
010-810020		Electric/Gas/Water	$1,500	$3,600	$3,600	$3,600	$3,600	$3,600	$3,600	$3,600	$3,600	$3,600
010-810050		Building Insurance	$0	$0	$0	$0	$7,500	$7,500	$7,500	$7,500	$7,500	$7,500
010-810100		Building Maintenance/Repair	$0	$0	$0	$0	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000
010-810200		Janitorial Supplies	$0	$0	$0	$0	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000
		Total Expense	**$437,165**	**$367,854**	**$660,470**	**$877,279**	**$874,234**	**$940,952**	**$976,368**	**$1,005,019**	**$1,018,909**	**$1,033,044**
		Net Income before Debt Service	$12,835	$75,634	$69,014	$62,980	$89	$14,442	$141,932	$214,857	$296,794	$322,906
		Debt Service Estimate	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
		Net Income after Debt Service	**$12,835**	**$75,634**	**$69,014**	**$62,980**	**$89**	**$14,442**	**$141,932**	**$214,857**	**$296,794**	**$322,906**

Center of Support Notes @ 85%	12-13 Proj	13-14 Proj	14-15 Proj	15-16 Proj	16-17 Proj	17-18 Proj	18-19 Proj	19-20 Proj	20-21 Proj	21-22 Proj
1 Staff Title	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation
Executive Director	$135,000	$136,823	$138,670	$140,542	$142,439	$144,362	$146,311	$148,286	$150,288	$152,317
Director of School Services	$0	$0	$0	$80,000	$81,080	$82,175	$83,284	$84,408	$85,548	$86,703
Director of Mangement Services	$0	$0	$0	$0	$80,000	$81,080	$82,175	$83,284	$84,408	$85,548
Director of Finances	$0	$0	$0	$0	$80,000	$81,080	$82,175	$83,284	$84,408	$85,548
Director of Human Capital	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Director of Development	$0	$0	$0	$0	$0	$80,000	$81,080	$82,175	$83,284	$84,408
Director of IT	$0	$0	$80,000	$81,080	$82,175	$83,284	$84,408	$85,548	$86,703	$87,873
Principal for year 2013-14	$80,000	$0	$0	$0	$0	$0	$0	$0	$0	$0
Principal for year 2015-16	$0	$0	$80,000	$0	$0	$0	$0	$0	$0	$0
Principal for year 2016-17	$0	$0	$0	$80,000	$0	$0	$0	$0	$0	$0
IT Technicians	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Administrative Assistant	$0	$0	$32,000	$32,432	$32,870	$33,314	$33,763	$34,219	$34,681	$35,149
	$215,000	$136,823	$330,670	$414,054	$498,563	$585,294	$593,195	$601,204	$609,320	$617,546
Consulting										
Finance Consultant / Bookkeeper	$10,000	$20,000	$20,000	$40,000	$0	$0	$0	$0	$0	$0
Development Manager / Grant Writer	$0	$20,000	$20,270	$20,544	$20,821	$0	$0	$0	$0	$0
HR Consultant	$25,000	$25,338	$25,680	$26,026	$26,378	$0	$0	$0	$0	$0
IT Consultant	$0	$40,000								
Educational Elements	$40,000		$40,000	$40,000						
APQC Membership				$5,000	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000
IFF	$20,000									
	$95,000	$105,338	$105,950	$131,570	$52,199	$5,000	$5,000	$5,000	$5,000	$5,000
4 Professional Development										
National Charter Schools Conference	$ 5,000									
Misc	$ 5,000	$10,000	$15,000						$15,000	$15,000	$15,000
School Spring - Recruiting Website		$100	$250	$250	$500	$500	$500	$500	$500	$500
	$ 10,000	$ 10,100	$ 15,250	$ 250	$ 500	$ 500	$ 500	$ 15,500	$ 15,500	$ 15,500

5 Rent @ $10/square foot and heating @ $5/square foot

Travel	12-13 Proj	13-14 Proj	14-15 Proj	15-16 Proj	16-17 Proj	17-18 Proj	18-19 Proj	19-20 Proj	20-21 Proj	21-22 Proj
Executive Director	$ -	$ 4,800	$ 4,800	$ 4,800	$ 2,400	$ 2,400	$ 4,800	$ 4,800	$ 4,800	$ 4,800
Director of School Services			$ -	$ 2,400			$ 2,400	$ 2,400	$ 2,400	$ 2,400
Director of Mangement Services			$ -	$ 2,400			$ 2,400	$ 2,400	$ 2,400	$ 2,400
Director of Finances				$ -			$ 2,400	$ 2,400	$ 2,400	$ 2,400
Director of Human Capital				$ -			$ 2,400	$ 2,400	$ 2,400	$ 2,400
Director of Development					$ -	$ -	$ 2,400	$ 2,400	$ 2,400	$ 2,400
Director of IT		$ 3,600	$ 3,600	$ 1,200	$ 1,200	$ 3,600	$ 3,600	$ 3,600	$ 3,600
Principal for year 2013-14	$ 19,840									
Principal for year 2015-16		$ 20,435								
Principal for year 2016-17			$ 21,048							
Administrative Assistant										
	$ 19,840	$ 4,800	$ 28,835	$ 34,248	$ 3,600	$ 3,600	$ 20,400	$ 20,400	$ 20,400	$ 20,400

Principal Intern Travel (used in calculations above)

# of Trips	8
Airfare	600
Food for 13 days	585
Extended Stay 13 days	845
Car & Gas for 13 days	450

SaaS	12-13 Proj	13-14 Proj	14-15 Proj	15-16 Proj	16-17 Proj	17-18 Proj	18-19 Proj	19-20 Proj	20-21 Proj	21-22 Proj
WebHelpDesk		$ 2,500	$ 2,575	$ 2,652	$ 2,732	$ 2,814	$ 2,898	$ 2,985	$ 3,075	$ 3,167
PowerSchool		$ 5,000	$ 3,500	$ 5,000	$ 5,150	$ 5,305	$ 5,464	$ 5,628	$ 5,796	$ 5,970
HRIS Platform		$ -	$ -	$ 10,000	$ 5,000	$ 5,150	$ 5,305	$ 5,464	$ 5,628	$ 5,796
School Spring - Recruiting Website		$ 600	$ 1,250	$ 1,300	$ 2,000	$ 2,300	$ 2,500	$ 2,500	$ 2,500	$ 2,500
	$ -	$ 8,100	$ 7,325	$ 18,952	$ 14,882	$ 15,568	$ 16,166	$ 16,576	$ 16,999	$ 17,434

	13-14 Projected	14-15 Projected	15-16 Projected	16-17 Projected	17-18 Projected	18-19 Projected	19-20 Projected	20-21 Projected	21-22 Projected
School 1									
School Revenue	1,592,609	1,766,386	2,152,572	2,247,170	2,562,061	2,841,304	2,811,597	2,811,597	2,811,597
School Expenses	1,592,370	1,753,007	2,103,696	2,164,189	2,445,699	2,637,363	2,652,110	2,652,384	2,652,384
Net Operating Revenue	239	13,379	48,876	82,981	116,362	203,940	159,487	159,213	159,213
School 2									
School Revenue	0	0	1,592,609	1,766,386	2,152,572	2,247,170	2,562,061	2,841,304	2,811,597
School Expenses	0	0	1,584,691	1,753,170	2,084,244	2,185,482	2,448,484	2,641,668	2,636,029
Net Operating Revenue	0	0	7,919	13,216	68,328	61,688	113,577	199,635	175,568
School 3									
School Revenue	0	0	0	1,592,609	1,770,386	2,156,572	2,251,170	2,566,061	2,845,304
School Expenses	0	0	0	1,591,293	1,755,150	2,121,927	2,199,989	2,470,662	2,655,798
Net Operating Revenue	0	0	0	1,316	15,236	34,646	51,181	95,399	189,506
All School Revenues	1,592,609	1,766,386	3,745,182	5,606,165	6,485,019	7,245,046	7,624,828	8,218,962	8,468,498
All School Expenses	1,592,370	1,753,007	3,688,387	5,508,652	6,285,093	6,944,773	7,300,583	7,764,714	7,944,210
All School Net Revenues	239	13,379	56,795	97,513	199,926	300,274	324,245	454,247	524,288
Network Revenue from Tuition	1,399,500	1,959,300	3,864,175	6,274,425	7,751,675	9,073,425	9,897,575	10,675,075	11,001,625
Student Count @ 100% Enrollment									
School 1	180	252	317	375	428	475	470	470	470
School 2	0	0	180	252	317	375	428	475	470
School 3	0	0	0	180	252	317	375	428	475
	180	**252**	**497**	**807**	**997**	**1,167**	**1,273**	**1,373**	**1,415**
Student Count @ 70% Enrollment									
School 1	126	176	222	263	300	333	329	329	329
School 2	0	0	126	176	222	263	300	333	329
School 3	0	0	0	126	126	126	126	126	126
	126	**176**	**348**	**565**	**648**	**721**	**755**	**788**	**784**

	12-13 Proj	13-14 Proj	14-15 Proj	15-16 Proj	16-17 Proj	17-18 Proj	18-19 Proj	19-20 Proj	20-21 Proj	21-22 Proj
School 1										
School Tax	0	202,928	284,099	357,378	422,766	482,517	535,503	529,866	529,866	529,866
School 2										
School Tax	0	0	0	202,928	284,099	357,378	422,766	482,517	535,503	529,866
School 3										
School Tax	0	0	0	0	202,928	284,099	357,378	422,766	482,517	535,503
Total School Taxes	0	202,928	284,099	560,305	909,792	1,123,993	1,315,647	1,435,148	1,547,886	1,595,236
CoS Expenses	435,665	346,575	619,705	850,346	730,877	695,563	918,561	962,571	962,994	963,429
Taxes - CoS Expenses	(435,665)	(143,648)	(335,607)	(290,040)	178,915	428,430	397,085	472,577	584,892	631,807
Restricted Donations	450,000	271,000	488,000	464,000	101,000	0	0	0	0	0
Taxes + Donations - Expenses	14,335	127,353	152,393	173,960	279,915	428,430	397,085	472,577	584,892	631,807
Per Pupil Expenses	N/A	1,925	2,459	1,711	906	698	787	756	701	681
Student Count										
School 1	0	180	252	317	375	428	475	470	470	470
School 2	0	0	0	180	252	317	375	428	475	470
School 3	0	0	0	0	180	252	317	375	428	475
	0	*180*	*252*	*497*	*807*	*997*	*1,167*	*1,273*	*1,373*	*1,415*
Student Count @ 85% Enrollment										
School 1	0	126	176	222	263	300	333	329	329	329
School 2	0	0	0	126	176	222	263	300	333	329
School 3	0	0	0	126	126	126	126	126	126	126
	0	*126*	*176*	*474*	*565*	*648*	*721*	*755*	*788*	*784*

ke 6th thru 12th Grade School
ted Budget @ 70% of Enrollment

	13-14 Proj Budget	14-15 Proj Budget	15-16 Proj Budget	16-17 Proj Budget	17-18 Proj Budget	18-19 Proj Budget	19-20 Proj Budget	20-21 Proj Budget	
	126	176	222	263	300	333	329	329	
ue Before Network Tax	7,775	7,775	7,775	7,775	7,775	7,775	7,775	7,775	
ue After Network Tax	6,648	6,648	6,648	6,648	6,648	6,648	6,648	6,648	
Operating Revenues									
Tuition - State	$837,601	$1,172,641	$1,475,108	$1,745,002	$1,991,628	$2,210,335	$2,187,069	$2,187,069	1
Lunch Revenue	$9,072	$12,701	$15,977	$18,900	$21,571	$23,940	$23,688	$23,688	8
Lunch Program Reibursement	$81,648	$114,307	$143,791	$170,100	$194,141	$215,460	$213,192	$213,192	8
Title I & II	$107,100	$149,940	$188,615	$223,125	$254,660	$282,625	$279,650	$279,650	2
Special Education EE Reimburse	$7,169	$7,169	$7,169	$7,169	$7,169	$7,169	$7,169	$7,169	
IDEA Flow Through	$34,020	$47,628	$59,913	$70,875	$80,892	$89,775	$88,830	$88,830	
Uniforms	$8,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	
Field Trips	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	
Miscellaneous Income	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000	
Restricted DPI Implementation Grant	$250,000	$250,000	$250,000	$0	$0	$0	$0	$0	
Restricted Walton Grant	$250,000	$0	$0	$0	$0	$0	$0	$0	
Donations	$0	$0	$0	$0	$0	$0	$0	$0	
Donations - Restricted	$0	$0	$0	$0	$0	$0	$0	$0	
Donations - Unrestricted	$0	$0	$0	$0	$0	$0	$0	$0	
Net Operating Revenue	$1,592,609	$1,766,386	$2,152,572	$2,247,170	$2,562,061	$2,841,304	$2,811,597	$2,811,597	
Operating Expense									
Salary Expense	$387,500	$410,000	$610,000	$610,000	$730,000	$760,000	$760,000	$760,000	3
Employer Tax Expense	$36,812.50	$38,950.00	$57,950.00	$57,950.00	$69,350.00	$72,200.00	$72,200.00	$72,200.00	6
Health Insurance	$62,000	$65,600	$97,600	$97,600	$116,800	$121,600	$121,600	$121,600	6
Dental Insurance	$7,750	$8,200	$12,200	$12,200	$14,600	$15,200	$15,200	$15,200	6
Life Insurance	$3,875	$4,100	$6,100	$6,100	$7,300	$7,600	$7,600	$7,600	6
Accountant/Audit Fees	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	
Professional Development	$5,000	$18,500	$23,500	$7,500	$7,500	$7,500	$7,500	$7,500	4
Consulting Expense	$0	$0	$5,000	$5,000	$5,000	$20,000	$20,000	$20,000	
Outside Services - Restricted	$0	$0	$0	$0	$0	$0	$0	$0	
Transportation	$15,000	$7,500	$15,000	$15,000	$15,000	$15,000	$15,000	$12,000	
Property Taxes	$0	$0	$0	$0	$0	$0	$0	$0	
Telephone	$9,500	$9,500	$9,500	$9,500	$9,500	$9,500	$9,500	$9,500	
Cable	$3,700	$3,700	$3,700	$3,700	$3,700	$3,700	$3,700	$3,700	
Copier Expense	$15,000	$15,000	$15,000	$15,000	$15,000	$15,000	$15,000	$15,000	
Printing	$4,500	$4,500	$4,500	$4,500	$4,500	$4,500	$4,500	$4,500	
Postage	$2,000	$4,000	$6,000	$6,000	$6,000	$6,000	$6,000	$6,000	
Office Supplies	$5,000	$5,000	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	
Office/Classroom Furniture	$61,640	$70,689	$43,308	$35,450	$33,957	$30,143	$10,000	$5,000	7
Computer Equipment	$42,740	$42,336	$53,256	$42,760	$39,568	$36,544	$25,960	$17,056	10
Uniform Expense	$8,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	
Technology Upgrades	$0	$0	$2,500	$2,500	$2,500	$2,500	$2,500	$2,500	
Classroom Curriculum/Supplies	$10,000	$5,000	$10,000	$10,000	$10,000	$10,000	$10,000	$8,000	
Dues and Subscriptions	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	
Field Trip Expense	$5,000	$2,000	$7,500	$7,500	$10,000	$10,000	$10,000	$10,000	
Lunch Expense	$102,060	$142,884	$179,739	$212,625	$242,676	$269,325	$266,490	$266,490	8
Scholarships	$0	$0	$0	$0	$0	$5,000	$5,000	$5,000	
College Expense - Restricted	$0	$0	$0	$0	$0	$66,975	$66,270	$66,270	9
SaaS Expenses	$85,500	$128,340	$157,830	$186,250	$212,220	$235,250	$232,800	$232,800	11
Insurance	$13,000	$13,000	$13,000	$13,000	$13,000	$13,000	$13,000	$13,000	6
Bank Fees	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	
Advertisement	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	
Legal Fees	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	
Interest Expense	$2,000	$2,000	$2,000	$2,000	$2,000	$2,000	$2,000	$2,000	
Recreation Expense	$5,000	$500	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	
Authorizer Fee	$19,593	$27,430	$34,505	$40,819	$46,588	$51,704	$51,160	$51,160	
Miscellaneous Expense	$4,000	$2,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	
Facility Fee	$658,200	$700,278	$688,008	$715,235	$782,940	$801,123	$853,130	$872,308	5
Total Expense	$1,592,370	$1,753,007	$2,103,696	$2,164,189	$2,445,699	$2,637,363	$2,652,110	$2,652,384	
Net Income before Debt Service	$239	$13,379	$48,876	$82,981	$116,362	$203,940	$159,487	$159,213	
Debt Service Estimate	$0	$0	$0	$0	$0	$0	$0	$0	

School 1 Notes @ 70% of Enrollment	13-14 Proj	14-15 Proj	15-16 Proj	16-17 Proj	17-18 Proj	18-19 Proj	19-20 Proj	20-21 Proj
Student Count (previous page)	126	176	222	263	300	333	329	329

1 Assumes the current $7,775 per student funding for 2R charter schools, less the anticipated network tax to cover the Center of Support Costs

2 Title I + Title II funding is based on a per pupil of $850

3 Staff Title

Staff Title	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation
Director	$ 80,000	$ 80,000	$ 80,000	$ 80,000	$ 80,000	$ 80,000	$ 80,000	$ 80,000
Dean of Students Lower			$ 60,000	$ 60,000	$ 60,000	$ 60,000	$ 60,000	$ 60,000
Dean of Students Upper					$ 60,000	$ 60,000	$ 60,000	$ 60,000
Curriculum Coach			$ 55,000	$ 55,000	$ 55,000	$ 55,000	$ 55,000	$ 55,000
ELA Teacher	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000
Math Teacher	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000
Science Teacher	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000
Social Studies Teacher	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000
Physical Education Teacher	$ 25,000	$ 25,000	$ 25,000	$ 25,000	$ 25,000	$ 25,000	$ 25,000	$ 25,000
PT Arts and Humanities	$ 25,000	$ 25,000	$ 25,000	$ 25,000	$ 55,000	$ 55,000	$ 55,000	$ 55,000
ELA Teacher				$ -		$ -	$ -	$ -
Math Teacher				$ -	$ -	$ -	$ -	$ -
Science Teacher				$ -	$ -	$ -	$ -	$ -
Social Studies Teacher				$ -	$ -	$ -	$ -	$ -
Physical Education Teacher				$ -	$ -	$ -	$ -	$ -
PT Arts and Humanities	$ -	$ -			$ -	$ -	$ -	$ -
Instructional Advisor 1	$ -	$ -	$ 30,000	$ 30,000	$ 30,000	$ 30,000	$ 30,000	$ 30,000
Instructional Advisor 2	$ -				$ 30,000	$ 30,000	$ 30,000	$ 30,000
Instructional Advisor 3					$ -		$ -	
Instructional Advisor 4					$ -	$ -	$ -	$ -
Instructional Advisor 5						$ -	$ -	$ -
Instructional Advisor 6						$ 30,000	$ 30,000	$ 30,000
Academic Counselor			$ 55,000	$ 55,000	$ 55,000	$ 55,000	$ 55,000	$ 55,000
Academic Counselor - College Focus						$ -	$ -	$ -
Special Ed Teacher	$ 22,500	$ 22,500	$ 22,500	$ 22,500	$ 22,500	$ 22,500	$ 22,500	$ 22,500
Secretary	$ 35,000	$ 35,000	$ 35,000	$ 35,000	$ 35,000	$ 35,000	$ 35,000	$ 35,000
IT Technician	$ 22,500	$ 22,500	$ 22,500	$ 22,500	$ 22,500	$ 22,500	$ 22,500	$ 22,500
	$ 387,500	$ 410,000	$ 610,000	$ 610,000	$ 730,000	$ 760,000	$ 760,000	$ 760,000

4 Professional Development

Project Based Learning - Instruction		$ 8,500	8500					
Project Based Learning - Coaching and OD		$ 7,500	$ 7,500					
Edmodo integration	$ 2,500							
PowerSchool On-Line PD	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500
Misc.			$ 5,000	$ 5,000	$ 5,000	$ 5,000	$ 5,000	$ 5,000
	$ 5,000	$ 18,500	$ 23,500	$ 7,500	$ 7,500	$ 7,500	$ 7,500	$ 7,500

5 Is included on the Facilities Tab

6 Uses multiples listed on 'Variables' tab

7 Classroom / Office Furniture

Principal's and Dean's Desk	$ 650	$ 650			$ 650			
Classroom Teacher's Desks	$ 2,560		$ 2,560					
Secretaries Desks	$ 593							
Counselor's Desk	$ 593							
Academic Advisors Desks	$ 593		$ 593	$ 593	$ 593			
Student Chairs	$ 8,789	$ 4,394	$ 1,694	$ 1,512	$ 1,382	$ 1,225		
Student Workstations	$ 38,304	$ 50,613	$ 26,163	$ 23,345	$ 21,333	$ 18,918		
Round Tables	$ 1,450	$ 1,450						
Classroom Tables	$ 2,033	$ 2,033						
Misc Furniture		$ 6,149	$ 12,298					
Service	$ 6,075	$ 5,400						
Furniture Replacement				$ 10,000	$ 10,000	$ 10,000	$ 10,000	$ 5,000
	$ 61,640	$ 70,689	$ 43,308	$ 35,450	$ 33,957	$ 30,143	$ 10,000	$ 5,000

8 Lunch Program

Revenue	$ 9,072	$ 12,701	$ 15,977	$ 18,900	$ 21,571	$ 23,940	$ 23,688	$ 23,688
Reimbursement	$ 81,648	$ 114,307	$ 143,791	$ 170,100	$ 194,141	$ 215,460	$ 213,192	$ 213,192
Service Cost	$ 102,060	$ 142,884	$ 179,739	$ 212,625	$ 242,676	$ 269,325	$ 266,490	$ 266,490

9 College Expenses

Cost per AP Test = $87
50% of seniors taking 3 AP Tests
2011 MATC Course = $383
50% of seniors dual enrolling at MATC in 3

courses per year						$ 54,578	$ 54,003	$ 54,003
50% of seniors taking 3 AP Tests (cont.)						$ 12,398	$ 12,267	$ 12,267
Total Restricted College Expenses	$ -	$ -	$ -	$ -	$ -	$ 66,975	$ 66,270	$ 66,270

10 Computer Equipment

Content Server	$ 2,500	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Chromebook Laptops	$ 30,240	$ 42,336	$ 53,256	$ 32,760	$ 29,568	$ 26,544	$ 15,960	$ 7,056
Replacement Laptops				$ 10,000	$ 10,000	$ 10,000	$ 10,000	$ 10,000
Networking Equipment	$ 10,000	$ -	$ -	$ -	$ -	$ -	$ -	$ -
	$ 42,740	$ 42,336	$ 53,256	$ 42,760	$ 39,568	$ 36,544	$ 25,960	$ 17,056

11 Software as a Service (SaaS)

Instructional platforms	$ 63,000	$ 105,840	$ 133,140	$ 157,500	$ 179,760	$ 199,500	$ 197,400	$ 197,400
Project Foundry	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500
Educational Elements Single Sign-on	$ 20,000	$ 20,000	$ 22,190	$ 26,250	$ 29,960	$ 33,250	$ 32,900	$ 32,900
	$ 85,500	$ 128,340	$ 157,830	$ 186,250	$ 212,220	$ 235,250	$ 232,800	$ 232,800

	15-16 Proj Budget	16-17 Proj Budget	17-18 Proj Budget	18-19 Proj Budget	19-20 Proj Budget	20-21 Proj Budget	21-22 Proj Budget	22-23 Proj Budget	
	126	176	222	263	300	333	329	329	
ıue Before Network Tax	7,775	7,775	7,775	7,775	7,775	7,775	7,775	7,775	
ıue After Network Tax	6,648	6,648	6,648	6,648	6,648	6,648	6,648	6,648	
Operating Revenues									
Tuition - State	$837,601	$1,172,641	$1,475,108	$1,745,002	$1,991,628	$2,210,335	$2,187,069	$2,187,069	1
Lunch Revenue	$9,072	$12,701	$15,977	$18,900	$21,571	$23,940	$23,688	$23,688	8
Lunch Program Reibursement	$81,648	$114,307	$143,791	$170,100	$194,141	$215,460	$213,192	$213,192	8
Title I & II	$107,100	$149,940	$188,615	$223,125	$254,660	$282,625	$279,650	$279,650	2
Special Education EE Reimburse	$7,169	$7,169	$7,169	$7,169	$7,169	$7,169	$7,169	$7,169	
IDEA Flow Through	$34,020	$47,628	$59,913	$70,875	$80,892	$89,775	$88,830	$88,830	
Uniforms	$8,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	
Field Trips	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	
Miscellaneous Income	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000	
Restricted DPI Implementation Grant	$250,000	$250,000	$250,000	$0	$0	$0	$0	$0	
Restricted Walton Grant	$250,000	$0	$0	$0	$0	$0	$0	$0	
Donations	$0	$0	$0	$0	$0	$0	$0	$0	
Donations - Restricted	$0	$0	$0	$0	$0	$0	$0	$0	
Donations - Unrestricted	$0	$0	$0	$0	$0	$0	$0	$0	
Net Operating Revenue	**$1,592,609**	**$1,766,386**	**$2,152,572**	**$2,247,170**	**$2,562,061**	**$2,841,304**	**$2,811,597**	**$2,811,597**	
Operating Expense									
Salary Expense	$370,000	$392,500	$592,500	$592,500	$712,500	$742,500	$742,500	$742,500	3
Employer Tax Expense	$35,150	$37,288	$56,288	$56,288	$67,688	$70,538	$70,538	$70,538	6
Health Insurance	$59,200	$62,800	$94,800	$94,800	$114,000	$118,800	$118,800	$118,800	
Dental Insurance	$7,400	$7,850	$11,850	$11,850	$14,250	$14,850	$14,850	$14,850	6
Life Insurance	$3,700	$3,925	$5,925	$5,925	$7,125	$7,425	$7,425	$7,425	6
Accountant/Audit Fees	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	
Professional Development	$10,500	$15,600	$17,500	$17,500	$17,500	$17,500	$17,500	$17,500	4
Consulting Expense	$0	$2,000	$0	$5,000	$5,000	$20,000	$20,000	$20,000	
Outside Services - Restricted	$0	$0	$0	$0	$0	$0	$0	$0	
Transportation	$7,500	$15,000	$7,500	$15,000	$15,000	$15,000	$15,000	$15,000	
Property Taxes	$0	$0	$0	$0	$0	$0	$0	$0	
Telephone	$9,500	$9,500	$9,500	$9,500	$9,500	$9,500	$9,500	$9,500	
Cable	$3,700	$3,700	$3,700	$3,700	$3,700	$3,700	$3,700	$3,700	
Copier Expense	$15,000	$15,000	$15,000	$15,000	$15,000	$15,000	$15,000	$15,000	
Printing	$4,500	$4,500	$4,500	$4,500	$4,500	$4,500	$4,500	$4,500	
Postage	$2,000	$4,000	$6,000	$6,000	$6,000	$6,000	$6,000	$6,000	
Office Supplies	$5,000	$10,000	$5,000	$10,000	$10,000	$10,000	$10,000	$10,000	
Office/Classroom Furniture	$61,640	$71,282	$16,101	$10,593	$10,000	$10,000	$10,000	$10,000	7
Computer Equipment	$42,740	$42,336	$53,256	$42,760	$39,568	$36,544	$25,960	$17,056	10
Uniform Expense	$8,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	
Technology Upgrades	$0	$0	$0	$2,500	$2,500	$2,500	$2,500	$2,500	
Classroom Curriculum/Supplies	$5,000	$10,000	$5,000	$10,000	$10,000	$10,000	$10,000	$10,000	
Dues and Subscriptions	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	
Field Trip Expense	$3,000	$7,500	$5,000	$7,500	$10,000	$10,000	$10,000	$10,000	
Lunch Expense	$102,060	$142,884	$179,739	$212,625	$242,676	$269,325	$266,490	$266,490	8
Scholarships	$0	$0	$0	$0	$0	$5,000	$5,000	$5,000	
College Expense - Restricted	$0	$0	$0	$0	$0	$66,975	$66,270	$66,270	9
SaaS Expenses	$85,500	$108,340	$135,640	$160,000	$182,260	$202,000	$199,900	$199,900	11
Insurance	$13,000	$13,000	$13,000	$13,000	$13,000	$13,000	$13,000	$13,000	6
Bank Fees	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	
Advertisement	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	
Legal Fees	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	
Interest Expense	$2,000	$2,000	$2,000	$2,000	$2,000	$2,000	$2,000	$2,000	
Recreation Expense	$3,000	$7,500	$5,000	$10,000	$10,000	$10,000	$10,000	$10,000	
Authorizer Fee	$19,593	$27,430	$34,505	$40,819	$46,588	$51,704	$51,160	$51,160	
Miscellaneous Expense	$0	$0	$0	$3,000	$3,000	$3,000	$3,000	$3,000	
Facility Fee	$688,008	$715,235	$782,940	$801,123	$853,130	$872,308	$883,437	$903,665	5
Total Expense	**$1,584,691**	**$1,753,170**	**$2,084,244**	**$2,185,482**	**$2,448,484**	**$2,641,668**	**$2,636,029**	**$2,647,353**	
Net Income before Debt Service	$7,919	$13,216	$68,328	$61,688	$113,577	$199,635	$175,568	$164,244	

School 2 Notes @ 70% of Enrollment	15-16 Projected	16-17 Projected	17-18 Projected	18-19 Projected	19-20 Projected	20-21 Projected	21-22 Projected	22-23 Projected
Student Count (previous page)	126	176	222	263	300	333	329	329

1   Assumes the current $7,775 per student funding for 2R charter schools, less the anticipated network tax to cover the Center of Support Costs

2   Title I + Title II funding is based on a per pupil of $850

3   **Staff Title**

Staff Title	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation
Director	$ 80,000	$ 80,000	$ 80,000	$ 80,000	$ 80,000	$ 80,000	$ 80,000	$ 80,000
Dean of Students Lower			$ 60,000	$ 60,000	$ 60,000	$ 60,000	$ 60,000	$ 60,000
Dean of Students Upper					$ 60,000	$ 60,000	$ 60,000	$ 60,000
Curriculum Coach			$ 55,000	$ 55,000	$ 55,000	$ 55,000	$ 55,000	$ 55,000
ELA Teacher	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000
Math Teacher	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000
Science Teacher	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000
Social Studies Teacher	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000
Physical Education Teacher	$ 25,000	$ 25,000	$ 25,000	$ 25,000	$ 25,000	$ 25,000	$ 25,000	$ 25,000
PT Arts and Humanities	$ 25,000	$ 25,000	$ 25,000	$ 25,000	$ 55,000	$ 55,000	$ 55,000	$ 55,000
ELA Teacher				$ -	$ -	$ -	$ -	$ -
Math Teacher				$ -	$ -	$ -	$ -	$ -
Science Teacher				$ -	$ -	$ -	$ -	$ -
Social Studies Teacher				$ -	$ -	$ -	$ -	$ -
Physical Education Teacher				$ -	$ -	$ -	$ -	$ -
PT Arts and Humanities		$ -	$ -		$ -	$ -	$ -	$ -
Instructional Advisor 1		$ -	$ 30,000	$ 30,000	$ 30,000	$ 30,000	$ 30,000	$ 30,000
Instructional Advisor 2	$ -				$ 30,000	$ 30,000	$ 30,000	$ 30,000
Instructional Advisor 3					$ -		$ -	
Instructional Advisor 4					$ -	$ -	$ -	$ -
Instructional Advisor 5						$ -	$ -	$ -
Instructional Advisor 6						$ 30,000	$ 30,000	$ 30,000
Academic Counselor			$ 55,000	$ 55,000	$ 55,000	$ 55,000	$ 55,000	$ 55,000
Academic Counselor - College Focus						$ -	$ -	
Special Ed Teacher	$ 22,500	$ 22,500	$ 22,500	$ 22,500	$ 22,500	$ 22,500	$ 22,500	$ 22,500
Secretary	$ 17,500	$ 17,500	$ 17,500	$ 17,500	$ 17,500	$ 17,500	$ 17,500	$ 17,500
IT Technician		$ 22,500	$ 22,500	$ 22,500	$ 22,500	$ 22,500	$ 22,500	$ 22,500
	$ 370,000	$ 392,500	$ 592,500	$ 592,500	$ 712,500	$ 742,500	$ 742,500	$ 742,500

4   **Professional Development**

	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation
Project Based Learning - Instruction	$ 4,250	$ 4,350						
Project Based Learning - Coaching and OD	$ 3,750	$ 3,750						
PowerSchool On-Line PD	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500
Misc.		$ 5,000	$ 15,000	$ 15,000	$ 15,000	$ 15,000	$ 15,000	$ 15,000
	$ 10,500	$ 15,600	$ 17,500	$ 17,500	$ 17,500	$ 17,500	$ 17,500	$ 17,500

5   **Is included on the Facilities Tab**

6   **Uses multiples listed on 'Variables' tab**

7   **Classroom / Office Furniture**

Principal's and Dean's Desk	$ 650	$ 650	$ 650					
Classroom Teacher's Desks	$ 2,560		$ 2,560					
Secretaries Desks	$ 593							
Counselor's Desk	$ 593							
Academic Advisors Desks	$ 593	$ 593	$ 593	$ 593				
Student Chairs	$ 8,789	$ 4,394	$ -	$ -	$ -	$ -	$ -	
Student Workstations	$ 38,304	$ 50,613	$ -	$ -	$ -	$ -		
Round Tables	$ 1,450	$ 1,450						
Classroom Tables	$ 2,033	$ 2,033						
Misc Furniture		$ 6,149	$ 12,298					
Service	$ 6,075	$ 5,400						
Furniture Replacement				$ 10,000	$ 10,000	$ 10,000	$ 10,000	$ 10,000
	$ 61,640	$ 71,282	$ 16,101	$ 10,593	$ 10,000	$ 10,000	$ 10,000	$ 10,000

8   **Lunch Program**

Revenue	$ 9,072	$ 12,701	$ 15,977	$ 18,900	$ 21,571	$ 23,940	$ 23,688	$ 23,688
Reimbursement	$ 81,648	$ 114,307	$ 143,791	$ 170,100	$ 194,141	$ 215,460	$ 213,192	$ 213,192
Service Cost	$ 102,060	$ 142,884	$ 179,739	$ 212,625	$ 242,676	$ 269,325	$ 266,490	$ 266,490

8   **College Expenses**

Cost per AP Test = $87								
50% of seniors taking 3 AP Tests						$ 12,398	$ 12,267	$ 12,267
2011 MATC Course = $383								
50% of seniors dual enrolling at MATC in 3 courses per year						$ 54,578	$ 54,003	$ 54,003
Total Restricted College Expenses	$ -	$ -	$ -	$ -	$ -	$ 66,975	$ 66,270	$ 66,270

9   **Computer Equipment**

Content Server	$ 2,500			$ -	$ -		$ -	$ -
Chromebook Laptops	$ 30,240	$ 42,336	$ 53,256	$ 32,760	$ 29,568	$ 26,544	$ 15,960	$ 7,056
Replacement Laptops				$ 10,000	$ 10,000	$ 10,000	$ 10,000	$ 10,000
Networking Equipment	$ 10,000	$ -	$ -	$ -	$ -	$ -	$ -	$ -
	$ 42,740	$ 42,336	$ 53,256	$ 42,760	$ 39,568	$ 36,544	$ 25,960	$ 17,056

Software as a Service (SaaS)

10 Instructional platforms	$ 63,000	$ 88,200	$ 110,950	$ 131,250	$ 149,800	$ 166,250	$ 164,500	$ 164,500
Project Foundry	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500
Educational Elements Single Sign-on	$ 20,000	$ 17,640	$ 22,190	$ 26,250	$ 29,960	$ 33,250	$ 32,900	$ 32,900
	$ 85,500	$ 108,340	$ 135,640	$ 160,000	$ 182,260	$ 202,000	$ 199,900	$ 199,900

B - 6th thru 12th Grade School
ed Budget @ 70% of Enrollment

	16-17 Proj Budget	17-18 Proj Budget	18-19 Proj Budget	19-20 Proj Budget	20-21 Proj Budget	21-22 Proj Budget	22-23 Proj Budget	23-24 Proj Budget	
	126	176	222	263	300	333	333	333	
nue Before Network Tax	7,775	7,775	7,775	7,775	7,775	7,775	7,775	7,775	
nue After Network Tax	6,648	6,648	6,648	6,648	6,648	6,648	6,648	6,648	
Operating Revenues									
Tuition - State	$837,601	$1,172,641	$1,475,108	$1,745,002	$1,991,628	$2,210,335	$2,210,335	$2,210,335	1
Lunch Revenue	$9,072	$12,701	$15,977	$18,900	$21,571	$23,940	$23,940	$23,940	8
Lunch Program Reibursement	$81,648	$114,307	$143,791	$170,100	$194,141	$215,460	$215,460	$215,460	8
Title I & II	$107,100	$149,940	$188,615	$223,125	$254,660	$282,625	$282,625	$282,625	2
Special Education EE Reimburse	$7,169	$7,169	$7,169	$7,169	$7,169	$7,169	$7,169	$7,169	
IDEA Flow Through	$34,020	$47,628	$59,913	$70,875	$80,892	$89,775	$89,775	$89,775	
Uniforms	$8,000	$8,000	$8,000	$8,000	$8,000	$8,000	$8,000	$8,000	
Field Trips	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	
Miscellaneous Income	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000	
Restricted DPI Implementation Grant	$250,000	$250,000	$250,000	$0	$0	$0	$0	$0	
Restricted Walton Grant	$250,000	$0	$0	$0	$0	$0	$0	$0	
Donations	$0	$0	$0	$0	$0	$0	$0	$0	
Donations - Restricted	$0	$0	$0	$0	$0	$0	$0	$0	
Donations - Unrestricted	$0	$0	$0	$0	$0	$0	$0	$0	
Net Operating Revenue	$1,592,609	$1,770,386	$2,156,572	$2,251,170	$2,566,061	$2,845,304	$2,845,304	$2,845,304	
Operating Expense									
Salary Expense	$345,000	$367,500	$592,500	$592,500	$712,500	$742,500	$742,500	$742,500	3
Employer Tax Expense	$32,775	$34,913	$56,288	$56,288	$67,688	$70,538	$70,538	$70,538	6
Health Insurance	$55,200	$58,800	$94,800	$94,800	$114,000	$118,800	$118,800	$118,800	6
Dental Insurance	$6,900	$7,350	$11,850	$11,850	$14,250	$14,850	$14,850	$14,850	6
Life Insurance	$3,450	$3,675	$5,925	$5,925	$7,125	$7,425	$7,425	$7,425	6
Accountant/Audit Fees	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	
Professional Development	$10,500	$10,500	$17,500	$17,500	$17,500	$17,500	$17,500	$17,500	4
Consulting Expense	$0	$0	$5,000	$0	$5,000	$20,000	$20,000	$20,000	
Outside Services - Restricted	$0	$0	$0	$0	$0	$0	$0	$0	
Transportation	$15,000	$5,000	$9,000	$5,000	$15,000	$15,000	$15,000	$15,000	
Property Taxes	$0	$0	$0	$0	$0	$0	$0	$0	
Telephone	$9,500	$9,500	$9,500	$9,500	$9,500	$9,500	$9,500	$9,500	
Cable	$3,700	$3,700	$3,700	$3,700	$3,700	$3,700	$3,700	$3,700	
Copier Expense	$15,000	$15,000	$15,000	$15,000	$15,000	$15,000	$15,000	$15,000	
Printing	$4,500	$4,500	$4,500	$4,500	$4,500	$4,500	$4,500	$4,500	
Postage	$2,000	$4,000	$4,000	$6,000	$6,000	$6,000	$6,000	$6,000	
Office Supplies	$5,000	$5,000	$8,000	$5,000	$10,000	$10,000	$10,000	$10,000	
Office/Classroom Furniture	$61,640	$71,282	$16,101	$10,593	$10,000	$10,000	$10,000	$10,000	7
Computer Equipment	$42,740	$42,336	$53,256	$42,760	$39,568	$36,544	$26,800	$17,896	10
Uniform Expense	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	
Technology Upgrades	$0	$2,500	$2,500	$2,500	$2,500	$2,500	$2,500	$2,500	
Classroom Curriculum/Supplies	$8,000	$8,000	$8,000	$10,000	$10,000	$10,000	$10,000	$10,000	
Dues and Subscriptions	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	
Field Trip Expense	$5,000	$2,000	$7,500	$2,000	$10,000	$10,000	$10,000	$10,000	
Lunch Expense	$102,060	$142,884	$179,739	$212,625	$242,676	$269,325	$269,325	$269,325	8
Scholarships	$0	$0	$0	$0	$0	$5,000	$5,000	$5,000	
College Expense - Restricted	$0	$0	$0	$0	$0	$66,975	$66,975	$66,975	9
SaaS Expenses	$85,500	$108,340	$135,640	$160,000	$182,260	$202,000	$202,000	$202,000	11
Insurance	$13,000	$13,000	$13,000	$13,000	$13,000	$13,000	$13,000	$13,000	6
Bank Fees	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	
Advertisement	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	
Legal Fees	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	
Interest Expense	$2,000	$1,000	$2,000	$1,000	$2,000	$2,000	$2,000	$2,000	
Recreation Expense	$5,000	$1,000	$5,000	$1,000	$10,000	$10,000	$10,000	$10,000	
Authorizer Fee	$19,593	$27,430	$34,505	$40,819	$46,588	$51,704	$51,704	$51,704	
Miscellaneous Expense	$1,000	$1,000	$4,000	$1,000	$6,000	$6,000	$6,000	$6,000	
Facility Fees	$715,235	$782,940	$801,123	$853,130	$872,308	$883,437	$903,665	$870,453	5
Total Expense	$1,591,293	$1,755,150	$2,121,927	$2,199,989	$2,470,662	$2,655,798	$2,666,281	$2,624,165	
Net Income before Debt Service	$1,316	$15,236	$34,646	$51,181	$95,399	$189,506	$179,023	$221,138	
Debt Service Estimate	$0	$0	$0	$0	$0	$0	$0	$0	
Net Income after Debt Service	$1,316	$15,236	$34,646	$51,181	$95,399	$189,506	$179,023	$221,138	

School 3 Notes @ 70% of Enrollment	16-17 Projected	17-18 Projected	18-19 Projected	19-20 Projected	20-21 Projected	21-22 Projected	22-23 Projected	23-24 Projected
Student Count (previous page)	126	176	222	263	300	333	333	333

1 Assumes the current $7,775 per student funding for 2R charter schools, less the anticipated network tax to cover the Center of Support Costs

2 Title I + Title II funding is based on a per pupil of $850

3

Staff Title	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation
Director	$ 80,000	$ 80,000	$ 80,000	$ 80,000	$ 80,000	$ 80,000	$ 80,000	$ 80,000
Dean of Students Lower			$ 60,000	$ 60,000	$ 60,000	$ 60,000	$ 60,000	$ 60,000
Dean of Students Upper					$ 60,000	$ 60,000	$ 60,000	$ 60,000
Curriculum Coach			$ 55,000	$ 55,000	$ 55,000	$ 55,000	$ 55,000	$ 55,000
ELA Teacher	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000
Math Teacher	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000
Science Teacher	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000
Social Studies Teacher	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000	$ 50,000
Physical Education Teacher	$ 25,000	$ 25,000	$ 25,000	$ 25,000	$ 25,000	$ 25,000	$ 25,000	$ 25,000
PT Arts and Humanities			$ 25,000	$ 25,000	$ 55,000	$ 55,000	$ 55,000	$ 55,000
ELA Teacher				$ -	$ -	$ -	$ -	$ -
Math Teacher				$ -	$ -	$ -	$ -	$ -
Science Teacher				$ -	$ -	$ -	$ -	$ -
Social Studies Teacher				$ -	$ -	$ -	$ -	$ -
Physical Education Teacher				$ -	$ -	$ -	$ -	$ -
PT Arts and Humanities		$ -	$ -		$ -	$ -	$ -	$ -
Instructional Advisor 1		$ -	$ 30,000	$ 30,000	$ 30,000	$ 30,000	$ 30,000	$ 30,000
Instructional Advisor 2	$ -				$ 30,000	$ 30,000	$ 30,000	$ 30,000
Instructional Advisor 3					$ -		$ -	
Instructional Advisor 4					$ -	$ -	$ -	$ -
Instructional Advisor 5						$ -	$ -	
Instructional Advisor 6						$ 30,000	$ 30,000	$ 30,000
Academic Counselor			$ 55,000	$ 55,000	$ 55,000	$ 55,000	$ 55,000	$ 55,000
Academic Counselor - College Focus						$ -	$ -	$ -
Special Ed Teacher	$ 22,500	$ 22,500	$ 22,500	$ 22,500	$ 22,500	$ 22,500	$ 22,500	$ 22,500
Secretary	$ 17,500	$ 17,500	$ 17,500	$ 17,500	$ 17,500	$ 17,500	$ 17,500	$ 17,500
IT Technician		$ 22,500	$ 22,500	$ 22,500	$ 22,500	$ 22,500	$ 22,500	$ 22,500
	$ 345,000	$ 367,500	$ 592,500	$ 592,500	$ 712,500	$ 742,500	$ 742,500	$ 742,500

4 Professional Development

	16-17	17-18	18-19	19-20	20-21	21-22	22-23	23-24
Project Based Learning - Instruction	$ 4,250	$ 4,250						
Project Based Learning - Coaching and OD	$ 3,750	$ 3,750						
PowerSchool On-Line PD	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500
Misc.			$ 15,000	$ 15,000	$ 15,000	$ 15,000	$ 15,000	$ 15,000
	$ 10,500	$ 10,500	$ 17,500	$ 17,500	$ 17,500	$ 17,500	$ 17,500	$ 17,500

5 Is included on the Facilities Tab

6 Uses multiples listed on 'Variables' tab

7 Classroom / Office Furniture

	16-17	17-18	18-19	19-20	20-21	21-22	22-23	23-24
Principal's and Dean's Desk	$ 650	$ 650	$ 650					
Classroom Teacher's Desks	$ 2,560		$ 2,560					
Secretaries Desks	$ 593							
Counselor's Desk	$ 593							
Academic Advisors Desks	$ 593	$ 593	$ 593	$ 593				
Student Chairs	$ 8,789	$ 4,394	$ -	$ -	$ -	$ -	$ -	
Student Workstations	$ 38,304	$ 50,613	$ -	$ -	$ -	$ -	$ -	
Round Tables	$ 1,450	$ 1,450						
Classroom Tables	$ 2,033	$ 2,033						
Misc Furniture		$ 6,149	$ 12,298					
Service	$ 6,075	$ 5,400						
Furniture Replacement				$ 10,000	$ 10,000	$ 10,000	$ 10,000	$ 10,000
	$ 61,640	$ 71,282	$ 16,101	$ 10,593	$ 10,000	$ 10,000	$ 10,000	$ 10,000

8 Lunch Program

	16-17	17-18	18-19	19-20	20-21	21-22	22-23	23-24
Revenue	$ 9,072	$ 12,701	$ 15,977	$ 18,900	$ 21,571	$ 23,940	$ 23,940	$ 23,940
Reimbursement	$ 81,648	$ 114,307	$ 143,791	$ 170,100	$ 194,141	$ 215,460	$ 215,460	$ 215,460
Service Cost	$ 102,060	$ 142,884	$ 179,739	$ 212,625	$ 242,676	$ 269,325	$ 269,325	$ 269,325

8 College Expenses

Cost per AP Test = $87

	16-17	17-18	18-19	19-20	20-21	21-22	22-23	23-24
50% of seniors taking 3 AP Tests	$ -	$ -	$ -	$ -	$ -	$ 12,398	$ 12,398	$ 12,398
2011 MATC Course = $383								
50% of seniors dual enrolling at MATC in 3								
9 courses per year	$ -	$ -	$ -	$ -	$ -	$ 54,578	$ 54,578	$ 54,578
Total Restricted College Expenses	$ -	$ -	$ -	$ -	$ -	$ 66,975	$ 66,975	$ 66,975

	16-17	17-18	18-19	19-20	20-21	21-22	22-23	23-24
Content Server	$ 2,500	$ -	$ -	$ -	$ -	$ -	$ -	$ -
10 Chromebook Laptops	$ 30,240	$ 42,336	$ 53,256	$ 32,760	$ 29,568	$ 26,544	$ 16,800	$ 7,896
Replacement Laptops				$ 10,000	$ 10,000	$ 10,000	$ 10,000	$ 10,000
Networking Equipment	$ 10,000	$ -	$ -	$ -	$ -	$ -	$ -	$ -
	$ 42,740	$ 42,336	$ 53,256	$ 42,760	$ 39,568	$ 36,544	$ 26,800	$ 17,896

Software as a Service (SaaS)

	16-17	17-18	18-19	19-20	20-21	21-22	22-23	23-24
Instructional platforms	$ 63,000	$ 88,200	$ 110,950	$ 131,250	$ 149,800	$ 166,250	$ 166,250	$ 166,250
Project Foundry	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500	$ 2,500
Educational Elements Single Sign-on	$ 20,000	$ 17,640	$ 22,190	$ 26,250	$ 29,960	$ 33,250	$ 33,250	$ 33,250
	$ 85,500	$ 108,340	$ 135,640	$ 160,000	$ 182,260	$ 202,000	$ 202,000	$ 202,000

s LLC Model
ted Budget @ 70%

	13-14 Proj Budget	14-15 Proj Budget	15-16 Proj Budget	16-17 Proj Budget	17-18 Proj Budget	18-19 Proj Budget	19-20 Proj Budget	20-21 Proj Budget	21-22 Proj
Operating Revenues									
School 1 Facility Fees	$632,500	$674,578	$692,116	$710,128	$803,627	$822,625	$842,135	$862,173	$882,752
School 2 Facility Fees			$632,500	$674,578	$717,116	$735,128	$803,627	$822,625	$842,135
School 3 Facility Fees				$632,500	$699,578	$717,116	$785,128	$803,627	$822,625
Net Operating Revenue	**$0**	**$0**	**$632,500**	**$1,307,078**	**$1,416,694**	**$1,452,244**	**$1,588,755**	**$1,626,251**	**$1,664,760**
Operating Expense									
School 1									
Rent Expense School 1	$400,000	$410,800	$421,892	$433,283	$444,981	$456,996	$469,335	$482,007	$495,021
Electric/Gas/Water School 1	$200,000	$205,400	$210,946	$216,641	$222,491	$228,498	$234,667	$241,003	$247,510
Building Insurance School 1	$7,500	$7,703	$7,910	$8,124	$8,343	$8,569	$8,800	$9,038	$9,282
Capital Reserves		$25,000	$25,000	$25,000	$100,000	$100,000	$100,000	$100,000	$100,000
Building Maintenance/Repair School 1	$15,000	$15,405	$15,821	$16,248	$16,687	$17,137	$17,600	$18,075	$18,563
Janitorial Supplies School 1	$10,000	$10,270	$10,547	$10,832	$11,125	$11,425	$11,733	$12,050	$12,376
	$632,500	**$674,578**	**$692,116**	**$710,128**	**$803,627**	**$822,625**	**$842,135**	**$862,173**	**$882,752**
School 2									
Rent Expense School 2			$400,000	$410,800	$421,892	$433,283	$444,981	$456,996	$469,335
Electric/Gas/Water School 2			$200,000	$205,400	$210,946	$216,641	$222,491	$228,498	$234,667
Building Insurance School 2			$7,500	$7,703	$7,910	$8,124	$8,343	$8,569	$8,800
Capital Reserves				$25,000	$50,000	$50,000	$100,000	$100,000	$100,000
Building Maintenance/Repair School 2			$15,000	$15,405	$15,821	$16,248	$16,687	$17,137	$17,600
Janitorial Supplies School 2			$10,000	$10,270	$10,547	$10,832	$11,125	$11,425	$11,733
			$632,500	**$674,578**	**$717,116**	**$735,128**	**$803,627**	**$822,625**	**$842,135**
School 3									
Rent Expense School 3				$400,000	$410,800	$421,892	$433,283	$444,981	$456,996
Electric/Gas/Water School 3				$200,000	$205,400	$210,946	$216,641	$222,491	$228,498
Building Insurance School 3				$7,500	$7,703	$7,910	$8,124	$8,343	$8,569
Capital Reserves					$50,000	$50,000	$100,000	$100,000	$100,000
Building Maintenance/Repair School 3				$15,000	$15,405	$15,821	$16,248	$16,687	$17,137
Janitorial Supplies School 3				$10,000	$10,270	$10,547	$10,832	$11,125	$11,425
				$632,500	**$699,578**	**$717,116**	**$785,128**	**$803,627**	**$822,625**
Custodial Wages	$20,000	$20,000	$40,000	$100,000	$100,000	$100,000	$100,000	$100,000	$80,000
Health Insurance	$3,200	$3,200	$6,400	$16,000	$16,000	$16,000	$16,000	$16,000	$12,800
Dental Insurance	$400	$400	$800	$2,000	$2,000	$2,000	$2,000	$2,000	$1,600
Life Insurance	$200	$200	$400	$1,000	$1,000	$1,000	$1,000	$1,000	$800
Employer Tax Expense	$1,900	$1,900	$3,800	$9,500	$9,500	$9,500	$9,500	$9,500	$7,600
	$25,700	**$25,700**	**$51,400**	**$128,500**	**$128,500**	**$128,500**	**$128,500**	**$128,500**	**$102,800**
Total Facilities Cost	$658,200	$700,278	$1,376,016	$2,145,706	$2,348,820	$2,403,369	$2,559,390	$2,616,924	$2,650,312

Staff Title	13-14 Proj Compensation	14-15 Proj Compensation	15-16 Proj Compensation	16-17 Proj Compensation	17-18 Proj Compensation	18-19 Proj Compensation	19-20 Proj Compensation	20-21 Proj Compensation	21-22 Proj Compensation	22-23 Proj Compensation	23-24 Proj Compensation
Custodian	$ 20,000	$ 20,000	$ 40,000	$ 40,000	$ 40,000	$ 40,000	$ 40,000	$ 40,000	$ 40,000	$ 40,000	$ 40,000
Custodian				$ 40,000	$ 40,000	$ 40,000	$ 40,000	$ 40,000	$ 40,000	$ 40,000	$ 40,000
Custodian				$ 20,000	$ 20,000	$ 20,000	$ 20,000	$ 20,000			
	$ 20,000	$ 20,000	$ 40,000	$ 100,000	$ 100,000	$ 100,000	$ 100,000	$ 100,000	$ 80,000	$ 80,000	$ 80,000

	12-13 Proj	13-14 Proj	14-15 Proj	15-16 Proj	16-17 Proj	17-18 Proj	18-19 Proj	19-20 Proj	20-21 Proj
t	0	126	176.4	347.9	564.9	697.9	817	891	961
enue Before Network Tax	7,775	7,775	7,775	7,775	7,775	7,775	7,775	7,775	7,775
work Tax	1,127	1,127	1,127	1,127	1,127	1,127	1,127	1,127	1,127
Operating Revenues									
School Tax	$0	$142,049	$198,869	$392,214	$636,854	$786,795	$920,953	$1,004,604	$1,083,520
Donations	$0	$0	$0	$0	$0	$0	$0	$0	$0
Donations - Restricted	$450,000	$271,000	$488,000	$464,000	$101,000	$0	$0	$0	$0
Donations - Unrestricted	$0	$0	$0	$0	$0	$0	$0	$0	$0
Miscellaneous Income	$0	$0	$0	$0	$0	$0	$0	$0	$0
Net Operating Revenue	**$450,000**	**$413,049**	**$686,869**	**$856,214**	**$737,854**	**$786,795**	**$920,953**	**$1,004,604**	**$1,083,520**
Operating Expense									
1 Salary Expense	$215,000	$135,000	$327,000	$487,000	$487,000	$487,000	$647,000	$647,000	$647,000
Employer Tax Expense	$20,425	$12,825	$31,065	$46,265	$46,265	$46,265	$61,465	$61,465	$61,465
Health Insurance	$34,400	$21,600	$52,320	$77,920	$77,920	$77,920	$103,520	$103,520	$103,520
Dental Insurance	$4,300	$2,700	$6,540	$9,740	$9,740	$9,740	$12,940	$12,940	$12,940
Life Insurance	$2,150	$1,350	$3,270	$4,870	$4,870	$4,870	$6,470	$6,470	$6,470
Accountant/Audit Fees	$6,000	$6,000	$6,000	$6,000	$6,000	$6,000	$6,000	$6,000	$6,000
2 Professional Development	$2,000	$5,100	$2,250	$250	$500	$500	$500	$15,500	$15,500
2 Consulting Expense	$95,000	$95,000	$95,000	$115,000	$35,000	$0	$0	$5,000	$5,000
Outside Services - Restricted	$0	$0	$0	$0	$0	$0	$0	$0	$0
5 Transportation	$19,840	$4,800	$28,835	$34,248	$3,600	$3,600	$20,400	$20,400	$20,400
Property Taxes	$0	$0	$0	$0	$0	$0	$0	$0	$0
Telephone	$2,500	$3,600	$3,600	$3,600	$3,600	$3,600	$3,600	$3,600	$3,600
Cable	$0	$0	$0	$0	$0	$0	$0	$0	$0
Copier Expense	$2,000	$10,000	$10,000	$10,000	$10,000	$10,000	$10,000	$12,500	$12,500
Printing	$2,000	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000
Postage	$5,000	$5,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000	$4,000
Office Supplies	$2,000	$2,000	$2,000	$2,000	$2,000	$2,000	$2,000	$5,000	$5,000
Office/Classroom Furniture	$6,000	$5,000	$5,000	$5,000	$2,000	$2,000	$2,000	$2,000	$2,000
Computer Equipment	$500	$6,000	$9,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000
Technology Upgrades	$0	$0	$0	$0	$0	$0	$0	$2,000	$2,000
Dues and Subscriptions	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000
6 SaaS Expenses	$0	$8,100	$7,325	$18,952	$14,882	$15,568	$16,166	$16,576	$16,999
Insurance	$2,500	$4,000	$6,000	$6,000	$6,000	$6,000	$6,000	$6,000	$6,000
Bank Fees	$50	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000
Advertisement	$10,000	$8,000	$10,000	$6,000	$4,000	$3,000	$3,000	$3,000	$3,000
Legal Fees	$3,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000	$1,000
Interest Expense	$0	$500	$500	$500	$500	$500	$500	$500	$500
Recreation Expense	$0	$0	$0	$0	$0	$0	$0	$0	$0
Miscellaneous Expense	$0	$0	$0	$0	$0	$0	$0	$0	$0
3 Rent Expense	$0	$0	$0	$0	$0	$0	$0	$0	$0
Electric/Gas/Water	$0	$0	$0	$0	$0	$0	$0	$3,600	$3,600
Building Insurance	$0	$0	$0	$0	$0	$0	$0	$7,500	$7,500
Building Maintenance/Repair	$0	$0	$0	$0	$0	$0	$0	$1,000	$1,000
Janitorial Supplies	$0	$0	$0	$0	$0	$0	$0	$4,000	$4,000
Total Expense	**$435,665**	**$346,575**	**$619,705**	**$850,346**	**$730,877**	**$695,563**	**$918,561**	**$962,571**	**$962,994**
Net Income before Debt Service	**$14,335**	**$66,474**	**$67,164**	**$5,868**	**$6,977**	**$91,232**	**$2,391**	**$42,033**	**$120,527**
Debt Service Estimate	$0	$0	$0	$0	$0	$0	$0	$0	$0
Net Income after Debt Service	**$14,335**	**$66,474**	**$67,164**	**$5,868**	**$6,977**	**$91,232**	**$2,391**	**$42,033**	**$120,527**

Center of Support Notes @ 70%	12-13 Proj	13-14 Proj	14-15 Proj	15-16 Proj	16-17 Proj	17-18 Proj	18-19 Proj	19-20 Proj	20-21 Proj	21-22 Proj
1 Staff Title	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation	Compensation
Executive Director	$135,000	$135,000	$135,000	$135,000	$135,000	$135,000	$135,000	$135,000	$135,000	$135,000
Director of School Services	$0	$0	$0	$80,000	$80,000	$80,000	$80,000	$80,000	$80,000	$80,000
Director of Mangement Services	$0	$0	$0	$80,000	$80,000	$80,000	$80,000	$80,000	$80,000	$80,000
Director of Finances	$0	$0	$0	$0	$80,000	$80,000	$80,000	$80,000	$80,000	$80,000
Director of Human Capital	$0	$0	$0	$0	$0	$0	$80,000	$80,000	$80,000	$80,000
Director of Development	$0	$0	$0	$0	$0	$0	$80,000	$80,000	$80,000	$80,000
Director of IT	$0	$0	$80,000	$80,000	$80,000	$80,000	$80,000	$80,000	$80,000	$80,000
Principal for year 2013-14	$80,000	$0	$0	$0	$0	$0	$0	$0	$0	$0
Principal for year 2015-16	$0	$0	$80,000	$0	$0	$0	$0	$0	$0	$0
Principal for year 2016-17	$0	$0	$0	$80,000	$0	$0	$0	$0	$0	$0
IT Technicians	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Administrative Assistant	$0	$0	$32,000	$32,000	$32,000	$32,000	$32,000	$32,000	$32,000	$32,000
	$215,000	**$135,000**	**$327,000**	**$487,000**	**$487,000**	**$487,000**	**$647,000**	**$647,000**	**$647,000**	**$647,000**
Consulting										
Finance Consultant / Bookkeeper	$10,000	$20,000	$20,000	$40,000	$0	$0	$0	$0	$0	$0
Development Manager / Grant Writer	$0	$10,000	$10,000	$10,000	$10,000	$0	$0	$0	$0	$0
HR Consultant	$25,000	$25,000	$25,000	$25,000	$25,000	$0	$0	$0	$0	$0
IT Consultant	$0	$40,000								
Educational Elements	$40,000		$40,000	$40,000						
APQC Membership				$0	$0	$0	$0	$5,000	$5,000	$5,000
IFF	$20,000									
	$95,000	**$95,000**	**$95,000**	**$115,000**	**$35,000**	**$0**	**$0**	**$5,000**	**$5,000**	**$5,000**
4 Professional Development										
National Charter Schools Conference	$ 5,000									
Misc	$ 5,000	$5,000	$2,000					$15,000	$15,000	$15,000
School Spring - Recruiting Website		$100	$250	$250	$500	$500	$500	$500	$500	$500
	$ 10,000	$ 5,100	$ 2,250	$ 250	$ 500	$ 500	$ 500	$ 15,500	$ 15,500	$ 15,500

5   Rent @ $10/square foot and heating @ $5/square foot

Travel	12-13 Proj	13-14 Proj	14-15 Proj	15-16 Proj	16-17 Proj	17-18 Proj	18-19 Proj	19-20 Proj	20-21 Proj	21-22 Proj
Executive Director	$ -	$ 4,800	$ 4,800	$ 4,800	$ 2,400	$ 2,400	$ 4,800	$ 4,800	$ 4,800	$ 4,800
Director of School Services			$ -	$ 2,400			$ 2,400	$ 2,400	$ 2,400	$ 2,400
Director of Mangement Services			$ -	$ 2,400			$ 2,400	$ 2,400	$ 2,400	$ 2,400
Director of Finances				$ -			$ 2,400	$ 2,400	$ 2,400	$ 2,400
Director of Human Capital				$ -			$ 2,400	$ 2,400	$ 2,400	$ 2,400
Director of Development					$ -	$ -	$ 2,400	$ 2,400	$ 2,400	$ 2,400
Director of IT			$ 3,600	$ 3,600	$ 1,200	$ 1,200	$ 3,600	$ 3,600	$ 3,600	$ 3,600
Principal for year 2013-14	$ 19,840									
Principal for year 2015-16			$ 20,435							
Principal for year 2016-17				$ 21,048						
Administrative Assistant										
	$ 19,840	$ 4,800	$ 28,835	$ 34,248	$ 3,600	$ 3,600	$ 20,400	$ 20,400	$ 20,400	$ 20,400

Principal Intern Travel (used in calculations above)	
# of Trips	8
Airfare	600
Food for 13 days	585
Extended Stay 13 days	845
Car & Gas for 13 days	450

SaaS	12-13 Proj	13-14 Proj	14-15 Proj	15-16 Proj	16-17 Proj	17-18 Proj	18-19 Proj	19-20 Proj	20-21 Proj	21-22 Proj
WebHelpDesk		$ 2,500	$ 2,575	$ 2,652	$ 2,732	$ 2,814	$ 2,898	$ 2,985	$ 3,075	$ 3,167
PowerSchool		$ 5,000	$ 3,500	$ 5,000	$ 5,150	$ 5,305	$ 5,464	$ 5,628	$ 5,796	$ 5,970
HRIS Platform		$ -	$ -	$ 10,000	$ 5,000	$ 5,150	$ 5,305	$ 5,464	$ 5,628	$ 5,796
School Spring - Recruiting Website		$ 600	$ 1,250	$ 1,300	$ 2,000	$ 2,300	$ 2,500	$ 2,500	$ 2,500	$ 2,500
	$ -	$ 8,100	$ 7,325	$ 18,952	$ 14,882	$ 15,568	$ 16,166	$ 16,576	$ 16,999	$ 17,434

Operating Revenues	July	August	September	October	November	December	January	February	March	April	May	June	
Beginning Balance	$ -	$ 328,496	$ 180,234	$ 165,937	$ 93,225	$ 78,927	$ 78,330	$ 23,608	$ 58,810	$ 60,713	$ 65,991	$ 51,693	
Tuition - State		$ 119,657	$ 119,657	$ 119,657	$ 119,657	$ 119,657	$ 119,657	$ 119,657	$ 119,657	$ 119,657	$ 119,657		$ 1,196,573
Lunch Revenue		$ 1,296	$ 1,296	$ 1,296	$ 1,296	$ 1,296	$ 1,296	$ 1,296	$ 1,296	$ 1,296	$ 1,296		$ 12,960
Title I & II							$ 50,000		$ 50,000			$ 53,000	$ 153,000
Special Education Reimbursement												$ 17,523	$ 17,523
IDEA Flow Through						$ 16,200		$ 16,200				$ 16,200	$ 48,600
Lunch Program Reimbursement			$ 11,664	$ 11,664	$ 11,664	$ 11,664	$ 11,664	$ 11,664	$ 11,664	$ 11,664	$ 11,664	$ 11,664	$ 116,640
Restricted DPI Implementation Grant	$ 250,000												$ 250,000
Restricted Walton Grant	$ 250,000												$ 250,000
Donations													$ -
Donations - Restricted													$ -
Donations - Unrestricted													$ -
Uniforms		$ 8,000											$ 8,000
Field Trips			$ 300	$ 300	$ 300	$ 300	$ 300	$ 300	$ 300	$ 300	$ 300	$ 300	$ 3,000
Miscellaneous Income		$ 500	$ 500	$ 500	$ 500	$ 500	$ 500	$ 500	$ 500	$ 500	$ 500		$ 5,000
Net Operating Revenue	$ 500,000	$ 129,453	$ 133,417	$ 133,417	$ 133,417	$ 149,617	$ 133,417	$ 183,417	$ 149,617	$ 183,417	$ 133,417	$ 98,687	$ 2,061,296
Operating Expense													
Salary Expense	$ 52,500	$ 52,500	$ 52,500	$ 52,500	$ 52,500	$ 52,500	$ 52,500	$ 52,500	$ 52,500	$ 52,500	$ 52,500	$ 52,500	$ 630,000
Accountant/Audit Fees		$ 500	$ 500	$ 500	$ 500	$ 500	$ 500	$ 500	$ 500	$ 500	$ 500	$ 5,000	$ 10,000
Printing		$ 2,500		$ 500		$ 500		$ 500		$ 500			$ 4,500
Professional Development		$ 15,000					$ 8,500						$ 23,500
Uniform Expense	$ 8,000												$ 8,000
Facility Fee	$ 54,850	$ 54,850	$ 54,850	$ 54,850	$ 54,850	$ 54,850	$ 54,850	$ 54,850	$ 54,850	$ 54,850	$ 54,850	$ 54,850	$ 658,200
Health Insurance	$ 25,200			$ 25,200			$ 25,200			$ 25,200			$ 100,800
Dental Insurance	$ 3,150			$ 3,150			$ 3,150			$ 3,150			$ 12,600
Life Insurance	$ 1,575			$ 1,575			$ 1,575			$ 1,575			$ 6,300
Office/Classroom Furniture		$ 8,056	$ 8,056	$ 8,056	$ 8,056	$ 8,056	$ 8,056	$ 8,056	$ 8,056	$ 8,056	$ 8,056		$ 80,555
Telephone	$ 792	$ 792	$ 792	$ 792	$ 792	$ 792	$ 792	$ 792	$ 792	$ 792	$ 792	$ 792	$ 9,500
Cable	$ 308	$ 308	$ 308	$ 308	$ 308	$ 308	$ 308	$ 308	$ 308	$ 308	$ 308	$ 308	$ 3,700
Employer Tax Expense	$ 4,988	$ 4,988	$ 4,988	$ 4,988	$ 4,988	$ 4,988	$ 4,988	$ 4,988	$ 4,988	$ 4,988	$ 4,988	$ 4,988	$ 59,850
Postage	$ 167	$ 167	$ 167	$ 167	$ 167	$ 167	$ 167	$ 167	$ 167	$ 167	$ 167	$ 167	$ 2,000
Office Supplies	$ 1,000	$ 400	$ 400	$ 400	$ 400	$ 400	$ 400	$ 400	$ 400	$ 400	$ 400		$ 5,000
Classroom Curriculum/Supplies	$ 8,000					$ 2,000							$ 10,000
Copier Expense	$ 1,250	$ 1,250	$ 1,250	$ 1,250	$ 1,250	$ 1,250	$ 1,250	$ 1,250	$ 1,250	$ 1,250	$ 1,250	$ 1,250	$ 15,000
Transportation	$ 1,250	$ 1,250	$ 1,250	$ 1,250	$ 1,250	$ 1,250	$ 1,250	$ 1,250	$ 1,250	$ 1,250	$ 1,250	$ 1,250	$ 15,000
Technology Upgrades													$ -
Insurance	$ 1,083	$ 1,083	$ 1,083	$ 1,083	$ 1,083	$ 1,083	$ 1,083	$ 1,083	$ 1,083	$ 1,083	$ 1,083	$ 1,083	$ 13,000
Dues and Subscriptions	$ 1,000												$ 1,000
Bank Fees	$ 250	$ 250	$ 250	$ 250	$ 250	$ 250	$ 250	$ 250	$ 250	$ 250	$ 250	$ 250	$ 3,000
Lunch Expense		$ 14,580	$ 14,580	$ 14,580	$ 14,580	$ 14,580	$ 14,580	$ 14,580	$ 14,580	$ 14,580	$ 14,580		$ 145,800
Recreation Expense		$ 500	$ 500	$ 500	$ 500	$ 500	$ 500	$ 500	$ 500	$ 500	$ 500		$ 5,000
Advertisement	$ 1,000						$ 2,000						$ 3,000
Legal Fees		$ 100	$ 100	$ 100	$ 100	$ 100	$ 100	$ 100	$ 100	$ 100	$ 100		$ 1,000
Interest Expense	$ 167	$ 167	$ 167	$ 167	$ 167	$ 167	$ 167	$ 167	$ 167	$ 167	$ 167	$ 167	$ 2,000
Field Trip Expense		$ 500	$ 500	$ 500	$ 500	$ 500	$ 500	$ 500	$ 500	$ 500	$ 500		$ 5,000
Consulting Expense		$ 500	$ 500	$ 500	$ 500	$ 500	$ 500	$ 500	$ 500	$ 500	$ 500		$ 5,000
Outside Services - Restricted													$ -
Scholarships													$ -
College Expense - Restricted													$ -
Computer Equipment	$ 4,642	$ 4,642	$ 4,642	$ 4,642	$ 4,642	$ 4,642	$ 4,642	$ 4,642	$ 4,642	$ 4,642	$ 4,642	$ 4,642	$ 55,700
SaaS Expenses		$ 112,500											$ 112,500
Property Taxes	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Authorizer Fee				$ 27,990									
Miscellaneous Expense	$ 333	$ 333	$ 333	$ 333	$ 333	$ 333	$ 333	$ 333	$ 333	$ 333	$ 333	333	$ 4,000
Total Expense	$ 171,504	$ 277,715	$ 147,715	$ 206,130	$ 147,715	$ 150,215	$ 188,140	$ 148,215	$ 147,715	$ 178,140	$ 147,715	$ 127,579	$ 2,010,505
Monthly Net Income (Deficit)	$ 328,496	$ (148,261)	$ (14,297)	$ (72,712)	$ (14,297)	$ (597)	$ (54,722)	$ 35,203	$ 1,903	$ 5,278	$ (14,297)	$ (28,892)	
Ending Balance	$ 328,496	$ 180,234	$ 165,937	$ 93,225	$ 78,927	$ 78,330	$ 23,608	$ 58,810	$ 60,713	$ 65,991	$ 51,693	$ 22,801	

Quest Position Listing

School Personnel

Position	Salaried/Hourly	10, 11, or 12 Months
Academic Counselor	Salaried	11
Curriculum Coach	Salaried	11
Dean of Students	Salaried	12
ELA Teacher	Salaried	11
Instructional Advisor	Hourly	11
IT Technician	Salaried	12
School Counselor	Salaried	12
School Director	Salaried	12
Secretary	Hourly	12
Teacher - Arts and Humanities	Salaried	11
Teacher - Math	Salaried	11
Teacher - Physical Education	Salaried	10
Teacher - Science	Salaried	11
Teacher - Social Studies	Salaried	11
Teacher - Special Education	Salaried	11

Center of Support Personnel

Position	Salaried/Hourly	10, 11, or 12 Months
Administrative Assistant	Hourly	12
Custodian	Hourly	12
Director of Development	Salaried	12
Director of Finances	Salaried	12
Director of Human Capital	Salaried	12
Director of IT	Salaried	12
Director of Management Services	Salaried	12
Director of School Services	Salaried	12
Executive Director	Salaried	12

Note: Full job descriptions are in Section 8.

IFF Real Estate Services, LLC

One North LaSalle, Suite 700
Chicago, Illinois 60602
Telephone 312 629 0060
Fax 312 629 0061

911 Washington, Ave., Suite 203
St. Louis, Missouri 63101
Telephone 314 588 8840
Fax 314 588 2170

215 N. Water Street, Suite 225
Milwaukee, Wisconsin 53202
Telephone 414 563 1100
Fax 414 223 0133

December 20, 2011

Dear City of Milwaukee Charter School Review Committee:

The purpose of this letter is to inform you of our intention to assist Quest Milwaukee ("Quest") in its efforts to identify locations to house its new schools.

Over the course of the last year, IFF has met with Quest multiple times in order to help the agency define the facility parameters needed for the proposed program model. IFF has reviewed the preliminary occupancy budgets and proposed search area for consistency with the program goals. Early next year, IFF will prepare a contract for services to assist Quest with implementation of the plan, including searching for sites that meet Quest's criteria and financial capacity, conducting due diligence to determine their suitability for use as a school, negotiating a purchase or lease on behalf of the school, and overseeing development of the property.

IFF is a private not-for-profit agency providing real estate and financial solutions to nonprofits throughout the Midwest. IFF has a solid track record of identifying and securing facilities for charter and other schools in Milwaukee and the agency's other markets. To date, IFF has worked with dozens of schools, including 16 in Milwaukee, and renovated or constructed over 700,000 square feet of space on their behalf. IFF's lending services division has provided nearly 100 loans to charter schools, totaling over $50 million and creating over 20,000 new charter school seats.

We are pleased to have the potential opportunity to assist Quest Milwaukee in their plans to charter innovative new schools in Milwaukee. If you have any questions regarding IFF or the agency's role in this process, please do not hesitate to contact me at 414-563-1102 or hheaviland@iff.org

Yours truly,

Heather Heaviland
Director of Real Estate Services, Wisconsin

BK

Burdick-Kellenberger
INSURANCE

January 4, 2012

Mr. Edgar T. Russell
Quest Executive Director
Institute for the Transformation of Learning
Marquette University
750 N. 18th Street
Milwaukee, WI 53233

RE: Insurance for Charter School

Dear Mr. Russell,

Thank you for contacting me for assistance with your charter schools insurance program.

This letter confirms our agreement to work together to find the insurance program and carrier best suited for Quest.

I will gather the applications that need to be completed and will forward to you via email.

Please contact me with any questions.

Sincerely,

Kelly Drescher
Account Executive

December 21, 2011

Quest-Milwaukee
750 N. 18th Street
Milwaukee, WI 53233

We are pleased to confirm our understanding of the services we are to provide Quest-Milwaukee, ("School") for the fiscal year ended June 30, 2014.

We will:

- Audit the School's Academic Achievement and Program Results.
- Audit the School's compliance with contractual requirements of the charter school contract.
- Audit the statement of financial position of Quest-Milwaukee as of June 30, 2014 and the related statements of activities and cash flows for the year ended June 30, 2014 ("financial statements") presented in accordance with generally accepted accounting principles. Also, the document we submit to you will include additional information including a Schedule of Instructional Expenses and Schedule of Non-Instructional Expenses. The additional information will be subjected to the auditing procedures applied in our audit of the financial statements.

The objective of our audit of the School's Academic Achievement and Program Results is the expression of an opinion whether your Report on Academic Performance is accurate, valid and representative of the students participating in the program, in all material respects, in conformity with U.S. generally accepted accounting principles. Our audit will be conducted in accordance with auditing standards generally accepted in the United States of America. If our opinion on the Report on Academic Performance is other than unqualified, we will discuss the reasons with management in advance. If, for any reason, we are unable to complete the audit or unable to form or have not formed an opinion, we may decline to express an opinion or to issue a report as a result of this engagement.

The objective of our audit of the School's compliance with contractual requirements of the charter school contract is the expression of an opinion whether your assertion on compliance with contract requirements is accurate based on our examination, in all material respects, in conformity with U.S. generally accepted accounting principles. Our audit will be conducted in accordance with auditing standards generally accepted in the United States of America. If our opinion on the compliance with contract requirements is other than unqualified, we will discuss the reasons with management in advance. If, for any reason, we are unable to complete the audit or unable to form or have not formed an opinion, we may decline to express an opinion or to issue a report as a result of this engagement.

The objective of our audit is the expression of an opinion about whether your financial statements are fairly presented, in all material respects, in conformity with U.S. generally accepted accounting principles and to report on the fairness of the additional information referred to in the first paragraph when considered in relation to the financial statements taken as a whole. Our audit will be conducted in accordance with U.S. generally accepted auditing standards and the standards for financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States, and will include tests of your accounting records and other procedures we consider necessary to enable us to express such an opinion. If our opinion on the financial statements is other than unqualified, we will discuss the reasons with management in advance. If, for any reason, we are unable to complete the audit or are unable to form or

Quest-Milwaukee
Page Two
December 21, 2011

have not formed an opinion, we may decline to express an opinion or to issue a report as a result of this engagement.

We will also provide a report (which does not include an opinion) on internal control related to the financial statements and compliance with laws, regulations, and the provisions of contracts or grant agreements, noncompliance with which could have a material effect on the financial statements as required by *Government Auditing Standards*. The report will include a statement that the report is intended solely for the information and use of the Board of Directors, management, and specific legislative or regulatory bodies and is not intended to be and should not be used by anyone other than these specified parties.

The management of Quest-Milwaukee is responsible for establishing and maintaining internal control and for compliance with laws, regulations, contracts, and agreements. In fulfilling this responsibility, estimates and judgments by management are required to assess the expected benefits and related costs of the controls. The objectives of internal control are to provide management with reasonable, but not absolute, assurance that assets are safeguarded against loss from unauthorized use or disposition, that transactions are executed in accordance with management's authorizations and recorded properly to permit the preparation of financial statements in accordance with generally accepted accounting principles.

Management is responsible for making all financial records and related information available to us. We understand that you will provide us with such information required for our audit and that you are responsible for the accuracy and completeness of that information. We will advise management about appropriate accounting principles and their application and will assist in the preparation of the School's financial statements, but the responsibility for the financial statements remains with management. As part of our engagement we may propose standard, adjusting, or correcting journal entries to your financial statements. You are responsible for reviewing the entries and understanding the nature of any proposed entries and the impact they have on the financial statements. Your responsibility includes the establishment and maintenance of adequate records and effective internal controls over financial reporting, the selection and application of accounting principles, and the safeguarding of assets. Management is responsible for adjusting the financial statements to correct material misstatements and for confirming to us in the management representation letter that the effects of any uncorrected misstatements aggregated by us during the current engagement and pertaining to the latest period presented are immaterial, both individually and in the aggregate, to the financial statements taken as a whole.

You are responsible for the design and implementation of programs and controls to prevent and detect fraud, and for informing us about all known or suspected fraud affecting the School involving (1) management, (2) employees who have significant roles in internal control, and (3) others where the fraud could have a material effect on the financial statements. You are also responsible for informing us of your knowledge of any allegations of fraud or suspected fraud affecting the School received in communications from employees, former employees, grantors, regulators, or others. In addition, you are responsible for identifying and ensuring that the School complies with applicable laws and regulations.

Quest-Milwaukee
Page Three
December 21, 2011

An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements; therefore, our audit will involve judgment about the number of transactions to be examined and the areas to be tested. We will plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement, whether from errors, fraudulent financial reporting, misappropriation of assets, or violations of laws or governmental regulations that are attributable to the School or to acts by management or employees acting on behalf of the School. Because an audit is designed to provide reasonable, but not absolute, assurance and because we will not perform a detailed examination of all transactions, there is a risk that material misstatements may exist and not be detected by us. In addition, an audit is not designed to detect immaterial misstatements or violations of laws or governmental regulations that do not have a direct and material effect on the financial statements. However, we will inform you of any material errors and any fraudulent financial reporting or misappropriation of assets that come to our attention. We will also inform you of any violations of laws or governmental regulations that come to our attention, unless clearly inconsequential. Our responsibility as auditors is limited to the period covered by our audit and does not extend to any later periods for which we are not engaged as auditors.

Our procedures will include tests of documentary evidence supporting the transactions recorded in the accounts, tests of the physical existence of inventories, and direct confirmation of receivables and certain other assets and liabilities by correspondence with selected funding sources, creditors, and financial institutions. We will also request written representations from the School's attorneys as part of the engagement, and they may bill the School for responding to this inquiry. At the conclusion of our audit, we will require certain written representations from management about the financial statements and related matters.

Identifying and ensuring that Quest-Milwaukee complies with laws, regulations, contracts, and agreements is the responsibility of management. As part of obtaining reasonable assurance about whether the financial statements are free of material misstatement, we will perform tests of Quest-Milwaukee's compliance with applicable laws and regulations and the provisions of contracts and agreements. However, the objective of our audit will not be to provide an opinion on overall compliance and we will not express such an opinion.

In planning and performing our audit, we will consider the internal control sufficient to plan the audit in order to determine the nature, timing, and extent of our auditing procedures for the purpose of expressing our opinion on Quest-Milwaukee's financial statements.

We will obtain an understanding of the design of the relevant controls and whether they have been placed in operation, and we will assess control risk. Tests of controls may be performed to test the effectiveness of certain controls that we consider relevant to preventing and detecting errors and fraud that are material to the financial statements and to preventing and detecting misstatements resulting from illegal acts and other noncompliance matters that have a direct and material effect on the financial statements. Tests of controls are required only if control risk is assessed below the maximum level. Our tests, if performed, will be less in scope than would be necessary to render an opinion on internal control and, accordingly, no opinion will be expressed in our report on internal control issued pursuant to *Government Auditing Standards.*

Quest-Milwaukee
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December 21, 2011

An audit is not designed to provide assurance on internal control or to identify reportable conditions. However, we will inform the governing body or audit committee of any matters involving internal control and its operation that we consider to be reportable conditions under standards established by the American Institute of Certified Public Accountants. Reportable conditions involve matters coming to our attention relating to significant deficiencies in the design or operation of the internal control that, in our judgment, could adversely affect the entity's ability to record, process, summarize, and report financial data consistent with the assertions of management in the financial statements. We will also inform management of any nonreportable conditions or other matters involving internal control, if any, as required by *Government Auditing Standards*.

We understand that your employees will prepare all cash, accounts receivable, and other confirmations we request and will locate any documents selected by us for testing.

The audit documentation for this engagement is the property of Ritz Holman LLP and constitutes confidential information. However, we may be requested to make certain audit documentation available to contracting agencies pursuant to authority given to it by law or regulation. If requested, access to such audit documentation will be provided under the supervision of Ritz Holman LLP personnel. Furthermore, upon request, we may provide photocopies of selected audit documentation to contracting agencies. The contracting agencies may intend, or decide, to distribute the photocopies or information contained therein to others, including other governmental agencies.

As part of our engagement, we will also prepare the federal and state information returns for the year ended June 30, 2014.

Our fees for this engagement will be based on the time required, billed at our hourly rates, adjusted for the value of the service provided plus our out-of-pocket expenses such as report production, typing, postage, etc. Our invoice for these fees will be rendered upon completion of our engagement and is payable on presentation.

Government Auditing Standards require that we provide you with a copy of our most recent external peer review report and any letter of comment, and any subsequent peer review reports and letters of comment received during the period of the contract. Our current peer review report accompanies this letter.

We appreciate the opportunity to be of service to Quest-Milwaukee and believe this letter accurately summarizes the significant terms of our engagement. If you have any questions, please let us know. If you agree with the terms of our engagement as described in this letter, please sign the enclosed copy and return it to us.

Very truly yours,

Ritz Holman LLP

RITZ HOLMAN LLP
Certified Public Accountants

Quest-Milwaukee
Page Four
December 21, 2011

RESPONSE:

This letter correctly sets forth the understanding of Quest-Milwaukee.

Signature: _Edge Russell_

Title: _Executive Director_

Date: _12/22/2011_

Independent Auditor Report of Management's Long Range
Business Plan and 2013-2014 School Year Budget

To the Board of Directors
Quest-Milwaukee

We have examined management's long range business plan and 2013-2014 school year budget for Quest-Milwaukee. We believe that the plan contains the essential components of a long range business plan. The six-year plan includes an increase in the number of students each year with the addition of a grade level until capacity is reached.

The long range business plan includes a detailing of projected expenses. Wages are expected to increase 2.7% and health insurance is expected to increase 16% annually. In addition, positions will be added as the school grows. Classroom materials and technology costs will increase with the increase in students. Additional operational expenses will increase at a rate of 2.7%, which is based on Quest-Milwaukee's estimated inflationary increase.

In our review of Quest-Milwaukee long range business plan and 2013-2014 school year budget, we conclude that the plan provides a sufficient basis for planning, budgeting and reporting as the plan is implemented.

Ritz Holman LLP

RITZ HOLMAN, LLP
Certified Public Accountants

RitzHolman
CPAs

Independent Accountant Report on Planned, Documented
Internal Controls Policies and Procedures

To the Board of Directors
Quest-Milwaukee

We have examined management's assertions that Quest-Milwaukee's internal control structure over financial reporting is suitably designed to prevent or detect material misstatements in the financial statements on a timely basis as described in Quest-Milwaukee's Financial Policies and Procedures Manual.

Our examination was made in accordance with standards established by the American Institute of Certified Public Accountants and, accordingly, included obtaining an understanding of the internal control structure over financial reporting, evaluating the design of the internal control structure, and such other procedures as we considered necessary in the circumstances. We believe that our examination provides a reasonable basis for our opinion.

In our opinion, Quest-Milwaukee's internal control structure over financial reporting as described in the Quest Milwaukee's Financial Policies and Procedures Manual is suitably designed to provide reasonable assurance that the specific control objectives would be achieved if the described policies and procedures were complied with satisfactorily.

Ritz Holman LLP

RITZ HOLMAN, LLP
Certified Public Accountants

Plan for Instructional Staff with Emergency Licenses

(Excerpted from the Quest Human Resources Handbook)

Licensure and Background Check

As applicable to Faculty positions, the Employee hereby represents and warrants to Quest that he/she is a professionally trained Employee and appropriately licensed by the Wisconsin Department of Public Instruction to perform in the position of Employment for Quest. And, that:

- The Employee agrees to provide Quest with a copy of his/her license(s) and transcripts.
- The Employee understands that he/she retains sole responsibility for maintaining the proper licensure/certifications at all times and ensuring that the proper documentation is on file with the Executive Director or his/her designee.
- The Employee has to present original copies of the proper licensure/certification to their supervisor before the contract can be signed.
- The Employee further understands that this employment contract will become immediately null and void if the Employee fails to have such proper documentation on file with Quest as required.

Emergency Licenses

If no suitable, licensed teaching candidates exist for an opening, Quest will consider requesting an emergency license for a teacher who has content knowledge in the academic area of need and who otherwise would be a suitable candidate. The application and administration of this request will be conducted within the DPI guidelines, using form PI-1602-EL or the appropriate DPI form, at the time of the request. In this instance, preference will be given to candidates with the shortest route to licensure.

The candidate under consideration must be in a program leading toward certification or be willing to enter into such a program immediately. Within 30 days of employment an achievable plan must be submitted to the School Director that clearly will result in regular certification within 2 years. This plan will be reviewed as part of the evaluation and contracting process.

To ensure that this plan is being executed, it is the teacher's responsibility to submit to their Director any transcripts, schedules and/or proof of payment, that substantiates their continued enrollment in programs that support their certification plan. Any teacher who is in danger of not being certified according their plan will not be recommended contract renewal.

License Expirations

The CoS will maintain an electronic calendar of expiration dates for licenses. The calendar will shared with School Directors and will provide them with timely reminders. Employees will be given advance warning of license expiration, through their School Director, and through the CoS.

Teachers who allow their licenses to expire will receive a series of warnings, including a termination letter, with termination contingent upon the employee providing proof that they have applied for license renewal or the CoS ability to verify license renewal through the DPI website.

The Employee must have a background check conducted and on file as a condition of employment and reviewed by the Executive Director or his/her designee. Any employment offer is consider contingent upon the acceptable results of the licensure and background check. Background checks will be performed at least every 3 years on all employees who have contact with students.

Employment Status

In the absence of a written employment contract, employment with Quest is terminable at will, meaning that the employment relationship can be terminated by Quest at any time, with or without notice and with or without cause. The at-will nature of an individual's employment with Quest may not be modified except by a written document approved by the Executive Director. Any expressed or implied agreements or assurances concerning the terms, conditions, or duration of an individual's employment with Quest are not binding upon Quest unless they are in writing, approved by the Executive Director.

Quest will maintain a database of all employee certifications and licenses. From time to time, Quest may provide a written reminder to employees regarding an expiring license. However, it is always the employees' responsibility to ensure that needed certifications and licenses are up to date and available for review by the Executive Director or his/her designate.

Quest is committed to employing only United States citizens and aliens who are authorized to work in the United States and does not unlawfully discriminate on the basis of citizenship or national origin. In compliance with the Immigration Reform and Control Act of 1986, as amended, each new employee, as a condition of employment, must complete the Employment Eligibility Verification Form I-9 and present documentation establishing identity and employment eligibility.

If an employee is authorized to work in this country for a limited time period, the individual will be required to submit proof of renewed employment eligibility prior to expiration of that period to remain employed by Quest. Former employees who are rehired must also complete the form if they have not completed an I-9 with Quest within the past three years, or if their previous I-9 is no longer retained or valid. Employees with questions or seeking more information are encouraged to contact the Executive Director.

Quest 2013-14 Plan to Educate Children with Disabilities

Plan to Educate Children with Disabilities

Quest-Milwaukee will comply with all applicable state laws, the Individuals with Disabilities Education Act (IDEA & IDEA-97), the Family Educational Rights and Privacy Act (FERPA), and section 504 of the Rehabilitation Act of 1973.

Quest is projecting and budgeting for 15% of our students to need special education services. During our 1st year of operation, we will hire a DPI licensed special education teacher, preferably with experience in charter school operations. Thereafter, we may provide services both directly and/or under contract with outside providers.

Services will be provided with consideration to the Wisconsin Department of Public Instructions, 'Model 2r Charter School Special Education Policies and Procedures', November 2008, Amended July 2011. Quest has met with a representative from the Independent Charter School Collaborative of Wisconsin and intends to have the following in place by the 1st day of school:

- A Child Find, Notice and Brochure,
- A peer review of our Special Education Referral Process,
- A Board adopted customization of the Model 2r Policies and Procedures,
- Any needed modifications to our Discipline Policy to address suspension and expulsions and the Board's role,
- Procedural safeguards for parents,
- Provisions for transfer of records,
- Provisions for Independent Education Evaluations,
- Provisions for releasing information to any outside agencies,
- Procedures that address 504 requirements.

Quest also intends to seek psychological and speech and language services through a contractual arrangement with a local or national provider.

The 1st Level Intervention Team at Quest will be the School Director, appointed subject area teachers, the Director of School Services (during year 3 and thereafter), the School Counselor, and the student advisor assigned to the student. Quest is committed to a program of responsible inclusion for students with special needs. This means that we will offer an education program designed to meet the learning needs and styles of the broadest possible spectrum of students, within the context of an RTI framework.

The 2nd Level Intervention Team will include the 1st Level team, plus the special education teacher. Our special education teacher will work with subject area teachers and special needs students within the subject classrooms and also in separate settings when necessary, to meet the individualized needs of each student, by previewing workshop material and new instructional platform content. The special education teacher and subject area teachers will work together to ensure that identified students remain activated and focused.

Staff will work with identified students for intensive, short-term "pull-asides," returning them to subject area activities with support materials, plans, and follow-up. The special education teacher will also provide strategic direct instruction for some individual students in one-to-one and in small groups within a resource setting, as determined by the IEP Team.

Additionally, the special education teacher will provide subject area teachers with strategic modeling, materials, curricular adaptations and follow-up that elaborates on instruction and practice for identified students, through co-planning and co-teaching. He or she will regularly review each student's level of service and adjusts it to meet his or her academic and social learning needs. The school will use appropriate IEP procedures for making referrals, conducting evaluations, communicating with families, writing and reviewing IEPs, maintaining student records, and reporting to federal and state authorities.

Referral Process

Level 1: Problem Solving

Teachers first bring concerns about a student's welfare and/or academic progress to their School Director, who arranges a meeting with the 1st Level Team and the parent who then collaborate to plan modifications and accommodations to enable the student to be successful in Tier 1 (universal) instruction. Students' progress or lack of is carefully documented in the student information system.

After 5 weeks, the Level Team and the parent will revisit the effects of the interventions to determine whether or not they were effective. Students experiencing academic and/or behavioral problems may or may not have a disability or require special education to meet their educational needs.

Level 2: Necessary Actions

If concerns persist and the intervention strategies are not sufficiently effective after no more than 10 weeks from the beginning of Level 1, the parents and the IEP team must determine whether or not the intervention has been successful and what the next step should be for the student. By analyzing data, one of three decisions may be made:

- The data shows continued improvement. The strategy works with the usual regular classroom supports. The intervention will continue.
- The data shows little or no improvement, and strategy was not implemented as planned. In this case, we would consider whether additional intervention is needed or whether a referral for a full and individual evaluation would be better.
- The data shows little or no improvement, and the teacher and key personnel believe that they have implemented the strategy as planned. When this occurs, refer the student for a full and individual evaluation.

We have met with and it is our intention to enter into a formal relationship with the Independent Charter School Collaborative of Wisconsin to utilize their resources and consulting services.

SECTION III: CERTIFICATION

Charter schools must abide by the following provisions of state law and the policy of the City of Milwaukee (open records for contractors with city, background checks). Please read the following list carefully. Initial each section of the list to certify that you understand these requirements and that the school will honor them. Please sign and date the certification in the space provided and return this section with your application. (Attachment R)

I certify that the school named in this application will not charge tuition to charter students. (Schools may charge tuition for students not eligible for charter status. Charter schools may accept students under other programs such as the Milwaukee Parental Choice Program. However, schools may not receive tuition payments for the same students from more than one program. Schools may also charge reasonable fees for such items as field trips or extracurricular activities.)

I certify that the school named in this application will abide by statutory eligibility requirements in determining who is a charter student. State statutes provide that students must meet the following tests: the student is a city resident.

I certify that the school named in this application will administer required state examinations. (State law requires charter schools to administer the state's examinations for fourth, eighth and tenth graders.)

I certify that the school named in this application is or will be nonsectarian.

I certify that the school named in this application will not discriminate in its admission policies or deny participation in any program or activity on the basis of a person's sex, race, religion, national origin, ancestry, pregnancy, marital or parental status, sexual orientation, or physical, mental, emotional or learning disability.

I certify that the school named in this application serves at-risk students or, if it does not now serve at-risk students, will serve at-risk students who apply and meet other admission requirements. (State statutes define at-risk students to include students in grades 5 - 12 who are one or more years behind their age group in the number of high school credits attained, or two or more years behind their age group in basic skills levels, and who are also one or more of the following: dropouts, habitual truants, parents or adjudicated delinquents.)

I certify that the school named in this application will abide by health and safety codes that apply to public schools, including immunization requirements.

I certify that the school named in this application is located in the City of Milwaukee.

Continued

Certification, continued

I certify that the applicant is not a for-profit entity.

I certify that the school named in this application will abide by city requirements for access to records of a contractor with the city.

I certify that the school named in this application has conducted criminal background checks on current employees and volunteers and will conduct criminal background checks on all new employees, and that the school will assign only those employees and volunteers who, in the judgment of the school have nothing in their background, including but not limited to pending charges or convictions of criminal offenses, which would render them unfit to work or otherwise have contact with the school's students and employees.

I certify that the school named in this application will submit information required by contract, including an annual financial audit, to the sponsor by the date established in the contract.

I certify that I understand that the award of a charter school contract is contingent meeting benchmarks identified in the charter school contract.

I certify that the school named in this application will comply with federal regulations that apply to charter schools authorized by the City of Milwaukee, including, but not limited to, the provisions in the No Child Left Behind Act that apply to schools in need of improvement (The 2001 passage of the Elementary and Secondary Education Act, also known as No Child Left Behind, contains significant sanctions for schools that do not meet its requirements; charter schools are required to comply with its provisions. For guidance from the US Department of Education, please see Charter School Policy Guidance for NCLB.)

I certify that the school named in this application will comply with the requirements of the CSRC regarding tasks required by the academic monitoring and operations monitoring consultants and any additional monitoring requirements that the CSRC develops as needed during the lifetime of the school's contract with the City of Milwaukee.

I hereby certify that I agree to abide by the requirements above and understand that failure to do so may result in revocation of the charter.

Edgar T. Russell, Jr.
_____
Applicant Legal Name

E. Edgar Russell
_____
Applicant Signature

1/6/2012
_____
Date

40 Developmental Assets® for Adolescents (ages 12-18)

Search Institute® has identified the following building blocks of healthy development—known as **Developmental Assets®**—that help young people grow up healthy, caring, and responsible.

External Assets

Support

1. **Family support**—Family life provides high levels of love and support.
2. **Positive family communication**—Young person and her or his parent(s) communicate positively, and young person is willing to seek advice and counsel from parents.
3. **Other adult relationships**—Young person receives support from three or more nonparent adults.
4. **Caring neighborhood**—Young person experiences caring neighbors.
5. **Caring school climate**—School provides a caring, encouraging environment.
6. **Parent involvement in schooling**—Parent(s) are actively involved in helping young person succeed in school.

Empowerment

7. **Community values youth**—Young person perceives that adults in the community value youth.
8. **Youth as resources**—Young people are given useful roles in the community.
9. **Service to others**—Young person serves in the community one hour or more per week.
10. **Safety**—Young person feels safe at home, school, and in the neighborhood.

Boundaries & Expectations

11. **Family boundaries**—Family has clear rules and consequences and monitors the young person's whereabouts.
12. **School Boundaries**—School provides clear rules and consequences.
13. **Neighborhood boundaries**—Neighbors take responsibility for monitoring young people's behavior.
14. **Adult role models**—Parent(s) and other adults model positive, responsible behavior.
15. **Positive peer influence**—Young person's best friends model responsible behavior.
16. **High expectations**—Both parent(s) and teachers encourage the young person to do well.

Constructive Use of Time

17. **Creative activities**—Young person spends three or more hours per week in lessons or practice in music, theater, or other arts.
18. **Youth programs**—Young person spends three or more hours per week in sports, clubs, or organizations at school and/or in the community.
19. **Religious community**—Young person spends one or more hours per week in activities in a religious institution.
20. **Time at home**—Young person is out with friends "with nothing special to do" two or fewer nights per week.

Internal Assets

Commitment to Learning

21. **Achievement Motivation**—Young person is motivated to do well in school.
22. **School Engagement**—Young person is actively engaged in learning.
23. **Homework**—Young person reports doing at least one hour of homework every school day.
24. **Bonding to school**—Young person cares about her or his school.
25. **Reading for Pleasure**—Young person reads for pleasure three or more hours per week.

Positive Values

26. **Caring**—Young person places high value on helping other people.
27. **Equality and social justice**—Young person places high value on promoting equality and reducing hunger and poverty.
28. **Integrity**—Young person acts on convictions and stands up for her or his beliefs.
29. **Honesty**—Young person "tells the truth even when it is not easy."
30. **Responsibility**—Young person accepts and takes personal responsibility.
31. **Restraint**—Young person believes it is important not to be sexually active or to use alcohol or other drugs.

Social Competencies

32. **Planning and decision making**—Young person knows how to plan ahead and make choices.
33. **Interpersonal Competence**—Young person has empathy, sensitivity, and friendship skills.
34. **Cultural Competence**—Young person has knowledge of and comfort with people of different cultural/racial/ethnic backgrounds.
35. **Resistance skills**—Young person can resist negative peer pressure and dangerous situations.
36. **Peaceful conflict resolution**—Young person seeks to resolve conflict nonviolently.

Positive Identity

37. **Personal power**—Young person feels he or she has control over "things that happen to me."
38. **Self-esteem**—Young person reports having a high self-esteem.
39. **Sense of purpose**—Young person reports that "my life has a purpose."
40. **Positive view of personal future**—Young person is optimistic about her or his personal future.

Wisconsin Employability Skills Certificate Program Assessment

Reinforcing 21ˢᵗ Century Skills

The intent of the *Wisconsin Employability Skills Certificate Program* is to recognize a student's mastery of employability skills valued by employers, to help students explore their career interests, and to provide a state credential of student mastery. This program allows:

- students and workers to document their employability skills
- employers to assess the skills they are looking for in quality employees
- educators to customize instruction to help students to acquire skills that today's workplace requires.

Directions for Evaluator or Employer

Thank you for your help in mentoring an entry-level employee at the beginning of their work experiences to become a more effective future employee. Please use the certificate program assessment to rate the employee based on the **3-2-1 scale**. Select the appropriate **work experience environment code or codes** to show where the student has demonstrated the skills or attitudes. Be sure to provide as much feedback as possible to the student under **comments**. If you cannot assess the employee on some of the items due to lack of access to practice or opportunity to observe the skill, please rank the student at a 1 level and provide ways for the student to gain this experience in the **goal** section after the category.

STUDENT INFORMATION		
Student/Employee Name	Supervising Teacher	Supervising Teacher's Email
School District	School Name and Address: (Street, City, State, and Zip)	
School Telephone *Area/No.*	School Fax *Area/No.*	
Workplace Mentor	Mentor's E-Mail Address	Mentor's Phone
Student's Position		Start Date
Work-Based Learning Site *(Employer name, street address, city, state, zip code)*		
Primary Responsibilities:		

School: Please review this **Employability Skills Certificate Program Assessment** with the participating employee and ensure that s/he understands the items to be assessed. Between the employer, community based partner, or the school, all items must be rated.

Certification: In order to receive a **State Certificate in Employability Skills**, the employee skill rating must be at least 26 points, with a minimum of a "2" rating for each assessed skill standard.

Rating Scale:

3   ***Exceeds Expectations:***   Exceeds entry-level criteria; requires minimal supervision; consistently displays this behavior

2   ***Meets Expectations:***   Meets entry-level criteria; requires some supervision; often displays this behavior

1   ***Working to Meet Expectations:***   Needs improvement; requires much assistance and supervision; rarely displays behavior

Work Experience Environment Code:

SB   School Based (Supervising Teacher)
WB   Work Based (Workplace Mentor)
CB   Community Based or Service Agency Based

Employability Skills and Attitudes	Rating Environment
Personal Work Habits and Attitudes	
1. Develops positive relationships with others *Examples of qualities and habits that the employee might exhibit include . . .* • Interacts with others with respect and in a non-judgmental manner • Responds to others in an appropriate and non-offensive manner • Helps co-workers and peers accomplish tasks or goals • Applies problem-solving strategies to improve relations with others • When managing others, shows traits such as compassion, listening, coaching, team development, and appreciation	*Choose one here:* ☐ 3 ☐ 2 ☐ 1 *Choose one or more here:* ☐ WB ☐ SB ☐ CB
Job Specific Examples: **Comments:** **Goals:**	
2. Communicates effectively with others *Examples of qualities and habits that the employee might exhibit include . . .* • Adjusts the communication approach for the target audience, purpose, and situation to maximize impact • Organizes messages/information in a logical and helpful manner • Speaks clearly and writes legibly • Models behaviors to show active listening • Applies what was read to actual practice • Asks appropriate questions for clarity	*Choose one here:* ☐ 3 ☐ 2 ☐ 1 *Choose one or more here:* ☐ WB ☐ SB ☐ CB
Job Specific Examples: **Comments:** **Goals:**	
3. Collaborates with Others *Examples of qualities and habits that the employee might exhibit include . . .* • Works effectively in teams with people of diverse backgrounds regardless of sex, race, ethnicity, nationality, sexuality, religion, political views, and abilities • Shares responsibility for collaborative work and decision making • Uses the problem-solving process to work through differences of opinion in a constructive manner to achieve a reasonable compromise • Avoids contributing to unproductive group conflict • Shares information and carries out responsibilities in a timely manner	*Choose one here:* ☐ 3 ☐ 2 ☐ 1 *Choose one or more here:* ☐ WB ☐ SB ☐ CB
Job Specific Examples:	

Comments:

Goals:

---

4. Maintains composure under pressure

Examples of qualities and habits that the employee might exhibit include . . .

- Uses critical thinking skills to determine the best options or outcomes when faced with a challenging situation
- Carries out assigned duties while under pressure
- Acts in a respectful, professional, and non-offensive manner while under pressure
- Applies stress management techniques to cope under pressure

Choose one here:
☐ 3   ☐ 2   ☐ 1
Choose one or more here:
☐ WB   ☐ SB   ☐ CB

Job Specific Examples:

Comments:

Goals:

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5. Demonstrates integrity

Examples of qualities and habits that the employee might exhibit include . . .

- Carries out responsibilities in an ethical, legal, and confidential manner
- Responds to situations in a timely manner
- Takes personal responsibility to correct problems
- Models behaviors that demonstrate self-discipline, reliability, and dependability

Choose one here:
☐ 3   ☐ 2   ☐ 1
Choose one or more here:
☐ WB   ☐ SB   ☐ CB

Job Specific Examples:

Comments:

Goals:

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6. Performs quality work

Examples of qualities and habits that the employee might exhibit include . . .

- Carries out written and verbal directions accurately
- Completes work efficiently and effectively
- Performs calculations accurately
- Conserves resources, supplies, and materials to minimize cost and environmental impact
- Uses equipment, technology, and work strategies to improve workflow
- Applies problem-solving strategies to improve productivity
- Adheres to worksite regulations and practices
- Maintains an organized work area

Choose one here:
☐ 3   ☐ 2   ☐ 1
Choose one or more here:
☐ WB   ☐ SB   ☐ CB

Job Specific Examples:

Comments:

Goals:

7. Provides quality goods or service (internal and external)

Examples of qualities and habits that the employee might exhibit include . . .

- Shows support for the organizational goals and principles by own personal actions
- Displays a respectful and professional image to customers
- Displays an enthusiastic attitude and desire to take care of customer needs
- Seeks out ways to increase customer satisfaction
- Produces goods to workplace specifications

Choose one here:
☐ 3   ☐ 2   ☐ 1

Choose one or more here:
☐ WB   ☐ SB   ☐ CB

Job Specific Examples:

Comments:

Goals:

---

8. Shows initiative and self-direction

Examples of qualities and habits that the employee might exhibit include . . .

- Prioritizes and carries out responsibilities without being told
- Responds with enthusiasm and flexibility to handle tasks that need immediate attention
- Reflects on any unsatisfactory outcome as an opportunity to learn
- Improves personal performance by doing something different or differently
- Analyzes how own actions impact the overall organization
- Supports own actions with sound reasoning and principles
- Balances personal activities to minimize interference with work responsibilities

Choose one here:
☐ 3   ☐ 2   ☐ 1

Choose one or more here:
☐ WB   ☐ SB   ☐ CB

Job Specific Examples:

Comments:

Goals:

---

9. Adapts to change

Examples of qualities and habits that the employee might exhibit include . . .

- Shows flexibility and willingness to learn new skills for various job roles
- Uses problem-solving and critical-thinking skills to cope with changing circumstances
- Modifies own work behaviors based on feedback, unsatisfactory outcomes, efficiency, and effectiveness
- Displays a "can do" attitude

Choose one here:
☐ 3   ☐ 2   ☐ 1

Choose one or more here:
☐ WB   ☐ SB   ☐ CB

Job Specific Examples:

Comments:

Goals:

---

10. Demonstrates safety and security regulations and practices

Examples of qualities and habits that the employee might exhibit include . . .

- Follows personal safety requirements
- Maintains a safe work environment
- Demonstrates professional role in an emergency
- Follows security procedures
- Maintains confidentiality

Choose one here:
☐ 3   ☐ 2   ☐ 1

Choose one or more here:
☐ WB   ☐ SB   ☐ CB

Job Specific Examples:

Comments:

Goals:

	Choose one here:
11. Applies job-related technology, information, and media	☐ 3 ☐ 2 ☐ 1
Examples of qualities and habits that the employee might exhibit include . . .	*Choose one or more here:*
• Applies technology effectively in the workplace • Accesses and evaluates information on the job • Accesses training manuals, websites, or other media related to the job	☐ WB ☐ SB ☐ CB

Job Specific Examples:

Comments:

Goals:

Personal Work Habits and Attitudes Subtotal	
Student/Employee must earn a subtotal of at least 22 out of a possible 33 for certification.	

Personal and Professional Development	
12. Fulfills training or certification requirements for employment	*Choose one here:* ☐ 3 ☐ 2 ☐ 1
Examples of this requirement may include. . .	*Choose one or more here:*
• Participation in required career-related training and/or educational programs • Passing certification tests to qualify for licensure and/or certification • Participation in company training or orientation	☐ WB ☐ SB ☐ CB
13. Sets personal goals for improvement	*Choose one here:* ☐ 3 ☐ 2 ☐ 1
Examples of this requirement may include. . .	*Choose one or more here:*
• Setting goals that are specific and measureable • Setting work-related goals that align with the organization's mission • Identifying strategies to reach goals • Reflecting on goal progress to regularly evaluate and modify goals	☐ WB ☐ SB ☐ CB

Job Specific Examples:

Comments:

Goals:

Personal and Professional Development Subtotal	
Student/Employee must earn a subtotal of at least 4 out of a possible 6 for certification.	

Wisconsin Employability Skills
Certificate Program Assessment
Reinforcing 21st Century Skills

Date of Evaluation	Grading Period *(if applicable)*
Student/Employee	School
Workplace	Position

Date	Employer Observations and Recommendations	Employee Reflection (accomplishments, potential obstacles, goals, strategies)
Final Evaluation		

Evaluation Summative Chart

Criteria	Points Necessary	Points Earned
Personal Work Habits and Attitudes	22	
Personal and Professional Development	4	
Total Points	26	
On-the-job hours completed	Hours Required	Hours Worked
Total Hours Worked	90	

I/We, the undersigned, attest that the information in this document is correct and has been reviewed by all parties collaboratively.

Signature of Workplace or Community Mentor Signature	Date
Teacher Supervisor Signature	Date
Student/Employee Signature	Date

(*Typed name is accepted for signature on forms returned via e-mail or fax*)

Please direct any questions concerning the Wisconsin Employability Skills Certificate Program to:
Career and Technical Education Team
Department of Public Instruction
P.O. Box 7841
Madison, WI 53707-7841
Fax: 608-267-9275
Phone: 608-267-3161
www.dpi.wi.gov/cte/cteskills.html

Mr. Edgar T Russell
Quest Executive Director
Institute for the Transformation of Learning
Marquette University
750 N. Street
Milwaukee, WI 53233

RE: Education Elements

Dear Mr. Russell,

This letter confirms the agreement between Quest and Education Elements to work together in developing a blended learning model for the school.

Our role at Education Elements is to help schools design and implement the right blended learning solution. When implemented with fidelity, blended learning accelerates student learning, helps teachers differentiate instruction, and improves school efficiency. As this charter application moves foreword, we will continue to assist Quest in planning the blended learning model they have crafted. Once the charter has been approved, we will continue to work with the administration and staff to seamlessly implement blended learning in the classroom, by advising on best practices, as well as providing technology, which enables blended learning.

Please contact me if you have any questions.

Sincerely,

Anthony Kim
CEO
Education Elements, Inc.
anthony@edelements.com

January 10, 2012

Proposal submitted by
Anne W. Nordholm, Ph.D. /GLCC

To: **Edgar T. Russell**
      Quest Executive Director
      Institute for the Transformation of Learning
      Marquette University
      750 N. 18th Street
      Milwaukee WI 53233

RE: Organizational Development for Teachers in a Constructivist Environment

Background
Quest seeks to create schools that are focused on:
- Developing a culture where students direct much of their learning,
- Students proposing, planning and managing their projects,
- Adults supporting learners with frequent check-ins and guidance,
- Learner projects that explicitly incorporate Common Core standards,
- Assessments of projects that allow for evaluating academic and non-academic skills
- Providing professional development and coaching that teachers and other staff members require to support the above.

Opportunity
Even after years of "reform" much of what happens in school continues to reflect the old industrial, mechanical view of education that is maladaptive to learning demands of today. Why? Our understanding of living systems helps us realize that our own assumptions and habitual actions are integral to creating the system we create. In order to create organizations that foster different, relevant, responsive learning, a conscious attention to organizational development for all members of a new learning community is necessary. Intentional reorientation via organizational development is the antidote to a backwards slide to hegemony or the disorientation that is inevitable as pioneers navigate new territory.

Constructivism is a learning theory that acknowledges that people are co-creative individuals acting within an interdependent context. Constructivism assumes that sustainable structures and processes are those that are able to be most responsive to fluctuations. Constructivist learning environments emphasize customization, community action, and global awareness. Organizational structures grounded in constructivism promote shared vision, reflection, and collaborative communication and maintain high levels of creative problem solving and resiliency.

Proposal for Consulting Services

Based on the materials and conversations about the program goals, combined with industry knowledge and expertise, I am proposing a two-year, four-phase process to build the capacity toward constructivist organizational practices and sustainability of Quest Schools. The actual OD processes, deliverables, and time and cost estimates will be dependent on an initial community readiness assessment.

1. **The learning community will be able to define the gap between organizational aspirations and current reality based on a systemic approach**.
   a. Facilitated discussions to find common ground and to identify the 7 categories of the learning community that will serve as systemic reference points and lenses for current and future analysis of "achievement, growth, and sustainability/adaptation."
   b. Exploring conflicting commitments and hidden assumptions that may inadvertently sabotage progress.
   c. Designing collaborative inquiries of current reality based on data.
   d. Functioning with appreciative inquiry to determine the present assets that may be used or adapted to address issues. This process will also help establish criteria for self-determination versus the need to engage external expertise.

   Phase One Time Estimate (depending on readiness assessment): 24 hours over 4 months.

2. **The learning community will create an organizational map/timeframe that moves the learning community from current reality to shared vision based on 7 shared-vision categories.**
   a. The organizational map should include progress continua for each of the 7 categories.
   b. In addition to organizational timelines, strategic plans, resource development and *personalized professional growth plans* will result from this process. For example, project-based learning (a predominant learning vehicle in constructivist environments) requires very specific skill sets with which staff may or may not be equipped. Emotional intelligence, cognitive architecture, and human growth development, etc., are all performance indicators for project-based learning with which both staff and students must be facile. Accountable adults will name their own gaps between current reality and necessary mastery and, then, design collaborative learning plans to move toward that mastery.

   Phase Two Time Estimate (depending on readiness assessment): 48 hours over 6 months.

3. **The learning community will identify/implement structures in the organization that reflect that the goals held within each growth category are priorities of the organization, and, therefore, time and resources are allocated to their development and articulation.**

Phase Three Time Estimate (depending on readiness assessment): 24 hours over 6 months.

4. **The learning community will create the case for advocacy and support**. The developing learning organization needs to build a variety of tools through which it can tell its story, share its goals and outcomes, and pursue specific support.

   Phase Four Time Estimate (depending on readiness assessment): 24 hours over 4 months.

Cost - The cost estimate is derived from consulting fees of $125/hour. Estimate does not include extensive travel, meeting expenses, graphic design or printing costs, if any.   This would be structured as a flat-fee based project.

Contact
To partner with Anne Nordholm and draft a letter of agreement please contact:

Anne Nordholm, Ph.D.
106 W. Seeboth
#620
Milwaukee, WI 53204
414-313-2151 or anne.nordholm@gmail.com

CV attached

January 20, 2012

Proposal submitted by
Anne W. Nordholm, Ph.D. /GLCC

To: Edgar T. Russell
**   Quest Executive Director**
**   Institute for the Transformation of Learning**
**   Marquette University**
**   750 N. 18th Street**
**   Milwaukee WI 53233**

RE: Designing Project Based Learning as the Curriculum, Instruction and Assessment (CIA) Vehicle in a Constructivist Environment

Background
Quest seeks to create schools that are focused on:
- Developing a culture where students direct much of their learning,
- Students proposing, planning and managing their projects,
- Adults supporting learners with frequent check-ins and guidance,
- Learner projects that explicitly incorporate Common Core standards,
- Assessments of projects that allow for evaluating academic and non-academic skills;
- Providing professional development and coaching that teachers and other staff members require to support the above.

Opportunity
Constructivism is a learning theory that acknowledges that people are co-creative individuals acting within an interdependent context. Constructivism assumes that sustainable structures and processes are those that are able to be most responsive to fluctuations. Constructivist learning environments emphasize customization, community action, and global awareness. Organizational structures grounded in constructivism promote shared vision, reflection, and collaborative communication and maintain high levels of creative problem solving and resiliency. Project-based learning is a pedagogical approach with many iterations. PBL can be a supportive framework for creating both a coherent and customized learning environment. The overall goal for PBL development is to create a conscious, consistent, comprehensive understanding and practice of moving learners from dependent habits to independent and interdependent learning proficiencies.

Proposal for Consulting Services

Based on the materials and conversations about the program goals, combined with industry knowledge and expertise, I am proposing a two-year, four-phase process to build the capacity toward constructivist project/problem-based practices and sustainability of

Quest Schools. The actual professional development processes, deliverables, and time and cost estimates will be dependent on an initial community readiness assessment. Readiness audit will include (but is not limited to) organizational structures that provide time to collaborate, professional growth needs and opportunities, technological infrastructure, staff experience with and commitment to PBL, overall team stability and resource adequacy.

1. **The learning community will be able to define the gap between PBL aspirations and current reality based on a systemic approach**. The consultant would provide:
   a. Facilitated discussions to create a school-specific continuum and framework via an asset mapping and aspirations mapping toward a school-wide project-based learning model.
   b. Exploration of conflicting commitments and hidden assumptions that may inadvertently sabotage progress.
   c. Designing collaborative inquiries and small study group facilitation to develop skills with
      i. Constructivism: Democratic Learning Environments, Progressive Assessment, Continuous Re-Orientation, and Community Partnerships
      ii. Developing and Refining Rubrics
      iii. Looking at Student Work
      iv. Advisor Disposition and Response to Intervention
      v. Student-led Conferences and Presentation Criteria for PBL

   Phase One Time Estimate (depending on readiness assessment): 40 hours over 10 months.
2. **Phase Two Time Estimate (depending on readiness assessment): 48 hours over 6 months. - The learning community will create an organizational map/timeframe that moves the learning community from current reality to its shared vision of PBL**
   a. The organizational map should include progress continua for each of the 7 categories.
   b. Organizational timelines, strategic plans, and *personalized professional growth plans* will result from this process. Project-based learning requires very specific skill sets with which staff may or may not be equipped. Emotional intelligence, cognitive architecture, and human growth development, etc., are all performance indicators for project-based learning with which both staff and students must be facile. Accountable adults will name their own gaps between current reality and necessary mastery and, then, design collaborative learning plans to move toward that mastery.
   c. The learning community will establish regular structures for applying understanding of how PBL skill sets and professional growth will inform the staff/student recruitment, hiring/enrollment, and evaluation processes.

3. **Phase Three Time Estimate (depending on readiness assessment): 24 hours over 6 months. - The learning community will identify/implement PBL structures in that support ongoing refinement and streamlining of PBL processes.** The priorities of the organization, and, therefore, time and resources allocated to their development and articulation are consistent with PBL technology support options, e.g., Project foundry

4. **Phase Four Time Estimate (depending on readiness assessment): 24 hours over 10 months. - The learning community will establish routines of community advocacy and support**. Staff and students will develop and implement opportunities to share learning with the community outside of the school. Real-world competitions, contests, symposia, community service, workshops, etc., and other cross-community communication will be emphasized. Students and staff need many diverse options to tell their story, share their goals and outcomes, and pursue specific feedback and support.

Cost - The cost estimate is derived from consulting fees of $125/hour. Estimate does not include extensive travel, meeting expenses, graphic design or printing costs, if any.   This would be structured as a flat-fee based project.

Contact
To partner with Anne Nordholm and draft a letter of agreement please contact:

Anne Nordholm, Ph.D.
106 W. Seeboth
#620
Milwaukee, WI 53204
414-313-2151 or anne.nordholm@gmail.com

SECTION V: CHECKLIST

Applicant Instructions: In the second column, identify the location of the required item in the application. This could include page number in application or attachment. Several items are not applicable to start-up schools; you will be required to provide them before the school can open. Timelines for these items will be outlined in the charter school contract.

Required Item Description	Location(s) in application	Present*
One page summary description of the charter school including: mission/vision, board chair, school leader, location, and educational program description. Also provide contact information for application team, including name, email, and phone number.	2nd Document in the application	
Mission and vision of the charter school	Section II: Education Program, page 1	
Name of "person" applying to operate the charter school	Page1 of 'Summary'	
Articles of Incorporation	Attachment 'B', page 1	
By-Laws	Attachment 'B', page 4	
Tax determination letter	Attachment 'B', page 20	
Evidence of CMO non-profit status, if applicable		
Board member resumes	Attachment 'A', page 1	
Board resolution adopting the organizational handbooks and manuals	Attachment 'D', page 1	
Personnel Manual (includes qualifications to be met by persons employed in the school; policies the school will follow in conducting background checks, staff recruitment and retention, and procedures for ensuring instructional staff are appropriately licensed)	Attachment 'D', page 2	
Operations Manual	Attachment 'D', page 35	
Parent Handbook	Attachment 'D', page 75	
Financial Policies and Procedures Manual	Attachment 'D', page 108	
IDEA Policies and Procedures Manual	Attachment 'D', page 148	
Evidence of conflict of interest policy	Attachment 'B', page 16	
Evidence of internal dispute resolution policies	Section I: School Operations, page 6	
Evidence of how parents will be involved in school governance	Section I: School Operations, page 6	
Organizational Chart of management and staff	Attachment 'C', page 1	
Educational leader resume	To be hired	
Business manager resume	Attachment 'A', page 7	

Describes the organizational structure and responsibilities of the management and staff.	Section I: School Operations, page 3	
Describes the school's fiscal management procedures.	Attachment 'D', page	
Identify the following items in the Financial Policies and Procedures Manual • Annual budgeting and budget reporting • Cash flow budgeting and reporting • GAAP and their application for this institution • Internal controls over major financial processes including cash receipts and disbursements, investments, donation/fundraising, facilities/equipment, procurement-accounts payable, billing-account receivable, payroll, travel expense reimbursement, insurance risk management, grants accounting and reporting, enrollment controls, general ledger-budgetary and accounting controls • City of Milwaukee Charter School financial reporting requirements and procedures developed to comply with these requirements • Financial reporting to the Board of Directors • Accounting and financial management qualifications, including professional development requirements for affected staff.	Attachment 'D', page 112 Attachment 'D', page 112 Attachment 'D', page 141 Attachment 'D', page 115 Attachment 'D', page 112 Attachment 'D', page 111 Section 8, page 10	(7 items)
Long range business plan	Attachment 'F'	
Detailed budget with key assumptions with two alternate budgets based on 15% below and 30% below project enrollment levels	Attachment 'H'	
Assurance that school's budget revenue and expenditure accounts directly reconcile to the accounting system line item or objects of expenditure accounts	Attachment 'H' Estimated Budget, page 3	
Annual cash budget showing monthly receipts, disbursements and beginning and end of month cash balances with key assumptions	Attachment 'I'	
Budget includes 2% fee for authorizer	Attachment 'H'	
Position listing of all part- and full-time staff	Attachment 'J'	
Sources and uses of funds	Attachment 'H', page 3	
Basis for revenue and expense estimates	Section I, page 12	
Contingency plan for revenue shortfalls	Section I, page 13	
Number of expected charter school students	Attachment 'F', page 2	
Monthly cash flow projections for first year of operation as a charter school	Attachment 'I'	
School Budget for the current school year, if applicable	Not Applicable	
Explanation of differences between current school year budget and proposed charter school budget	Not Applicable	

Facility description	Section I: School Operations, page 13	
Proof of ownership or tenant status	Not Applicable	
Building Inspection letter affirming code compliance	Not Applicable	
Occupancy permit	Not Applicable	
Plans to expand or move	Not Applicable	
Certificate of insurance with adequate coverages	Not Applicable	
Letter from insurance provider	Attachment 'I'	
Evidence that City shall be afforded thirty (30) day written notice of cancellation, non-renewal, or material change by any of the Charter School insurers.	Section I: page 14	
Independent Audit engagement letter for first fiscal year	Attachment 'R'	
Auditor report on school's long range business plan and first year budget	Attachment 'S'	
Auditor report on planned, documented internal controls policies and procedures	Attachment 'T'	
Academic goals are present	Section II: Education Program, page 1	
Curriculum	Section II: Education Program, page 1	
Method of instruction	Section II: Education Program, page 2	
Description of specific student assessment measures	Section II: Education Program, page 13	
Explanation of how school's accountability system incorporate CSRC assessments	Section II: Education Program, page 14	
Identification of staff person and board rep. or committee reporting to CSRC	Section II: Education Program, page 26	
Student Information Management Software ID	Section I: School Operations, page 9	
Existing student achievement data, if applicable	Not Applicable	
Other accountability measures	Section II: Education Program, page 13	
Listing of instructional staff	Not Applicable	
Description for ensuring all instructional staff are licensed	Attachment 'D', page 8	
Assurance that identified staff are licensed; plans for those who need emergency certification	Attachment 'V'	
Admission Procedures	Section II: Education Program, page 16	
Description of lottery process for over-enrollment	Section II: Education Program, page 16	
Description to achieve racial and ethnic balance reflective of the school district	Section II: Education Program, page 16	
Certification that the school will accept at-risk students	Section V: Certifications	
Description of admission procedures for students with IEPs.	Section II: Education Program, page 16	

Description of disciplinary procedures	Attachment 'D', page 74	
For existing schools, a summary of disciplinary actions taken during the previous school year	Not Applicable	
Evidence of relationship with other agencies to provide services	Attachment 'W'	
Curriculum adaptations	Attachment 'D', page 149	
Proposed staffing adequate to meet obligations under IDEA	Position Listing, Attachment 'H', page 2	
Data on students with special needs for existing schools	Not Applicable	
Certification signed and dated	Section V: Certifications	
FOR applicants currently operating a school		**YES/NO***
The applicant has created a new organization to operate the charter school		
The applicant has communicated to parents that students will need to enroll in the charter school		
FOR applicants currently operating a sectarian school		**YES/NO***
Application describes a program which is nonsectarian in its practices, programs, admission policies, employment practices and all other operations		
Website communicates nonsectarian nature of school		
Name of school communicates nonsectarian nature of school		

*To be completed by technical reviewer

Business Plan

February 3rd, 2012

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Executive Summary

The Quest vision is to be "most effective network of schools in the United States at closing the achievement gap". Quest will be unique to the city of Milwaukee in that we will operate a system of learning environments incorporating blended learning and project based learning as the primary instructional strategies. These environments will be designed to more effectively serve students, especially low-income students. Ours will be a high productivity school model where every effort is invested in obtaining superior outcomes for each student. We have a unique opportunity to introduce the City of Milwaukee to proven educational models that have propelled academic achievement in other regions of the country.

By the year 2022, Quest schools will graduate over 140 students per year, who will be highly self-directed learners, possessing 21st Century skills that colleges and employers alike will value. Quest graduates will have a variety of post-secondary opportunities available to them and be valued in the community, not only for their academic accomplishments, but also for their contributions to the communities in which they live.

To meet our objectives for our students, Quest must: (1) focus on recruiting and developing the human capital needed to support a new educational model, where students are expected to provide much more input and direction of their own learning; (2) partner with recruiters who can assist us in locating teachers who value teaching students at the higher order thinking skills and aren't afraid to turn over most of their drill and practice activities to technological solutions; (3) keep abreast of the latest thinking and writing on what high productivity learning environments look like and be ready to evaluate those new models for possible inclusion in the evolving Quest model; (4) monitor and evaluate the latest developments in project-based learning and be ready to implement the best and promising practices from this area; (5) show leadership and resiliency in implementing these high productivity models and systems with fidelity and be uncompromising in obtaining the best that these models have to offer our students; (6) execute our plans within our designed framework and create a mindset for flawless school launches. Every opportunity for failure at the school and the network level must be anticipated and mitigated in advance; (7) be vigilant in securing facilities that support the vision and mission of Quest schools.

To accomplish our goals and objectives, over a 6 year period Quest will need $1.9 million in 3rd source funding in addition to state provided grants for charter schools, Walton Family Foundation Charter School Startup grants, and the per pupil resources from the State of Wisconsin

With these resources, Quest will develop a network office that supports our schools until they can support themselves and the Quest infrastructure. Quest will ultimately be self-sufficient after its 6th year of operation and should not continue to need major 3rd source funding.

The Milwaukee Market and the Need for Quest

It is our hope that one day; the City of Milwaukee will be a city that other large cities look to as an example of how to provide quality education environments for students that are closing the racial achievement gap. Quest believes it is important that some of the environments that deliver quality educational experiences have Boards of Directors led by Black people. It is important that high performing learning environments, led by people of all races, becomes the norm in the City. However, this effort to bring about significant educational changed by creating new high quality institutions is both an educational strategy and a social movement strategy. History has shown that social movements, which positively impact Black people, have been most effective when the mantle of leadership is borne by credible, Black-led organizations that have the capacity to work closely with allies of all races to reach common objectives. We have an opportunity in Milwaukee to lead the way in meeting both of these important objectives – high performing learning environments with some of them being led by Black people. Quest will play a key role in achieving both goals.

Background

Historical Socioeconomic Factors of the City of Milwaukee

In the mid to late 1980s, Milwaukee began to show trends of socioeconomic despair within its working class and their communities – hit hardest was the city's African American population.[1] The city had experienced the closing of a number of large employers like Pabst Brewing Company, Schlitz Brewing Company and Allis-Chalmers Company. During this period, Milwaukee lost more jobs than all but 5 of the largest metropolitan areas.[2]

From 1995 through 2010, more jobs were lost when companies such as Tower Automotive (formerly A.O. Smith), Johnson Controls, Inc., Master Lock, Rockwell Automotive (formerly Allen-Bradley), and Delphi Automotive (formerly AC/Delco) closed some or all of their operations in Milwaukee and moved jobs to foreign countries or to other states. The result was a loss of 33,000 jobs in the first 5 year period and a loss of over 73,000 jobs over the 15 year period.[3] This was accompanied by rapid migration from manufacturing jobs to services jobs. In the span of a few years, the city's employment needs shifted from blue-collar skilled laborers to entry-level service positions and college educated white-collar professionals. Many good paying manufacturing jobs that the community thought would be around for years were now gone.

Today, Milwaukee is arguably one of the worst large U.S. cities in which to live, particularly if you are an African American.[4] It is amongst the top six of the country's fifty largest cities for high unemployment

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[1] (Schmid, John, 2004)
[2] (Levine, Marc, 2010)
[3] (Thomas, G. Scott, 2010)
[4] (Thompson, 2009)

rates. Between 1970 and 2009 the employment rate for Black declined from 73.7% to 46.7%.[5] When reported in 2010, this represented a new low in African American employment for the city.[6] African American employment levels were already the second lowest in the U.S. Only Detroit, Michigan had lower rates. Additionally, the gap between white and black employment was the largest in the nation.[7]

In 2009, Milwaukee's average household income was 12% lower than the national average. Milwaukee ranked 7th in the nation for child poverty and 11th for overall poverty.[8] The estimated median income for a household in the city was $34,868, and the estimated per capita income for the city is $18,290.[9]Buried in those numbers were 32% of the city's African American children under the age of 18 who live in poverty.[10]

The Milwaukee Metropolitan Association of Commerce (MMAC) states that, "There is no greater determinant of a region's prosperity than the educational attainment and workforce skills of its citizens."[11] Over the last two decades, in an effort to address the issue of educational attainment, the State of Wisconsin created, within the City of Milwaukee, a system of education that is designed to provide parents with the power to access a variety of educational options for their children.

The Milwaukee Educational Ecosystem

School Type	Funding Per Pupil	2009-10 Enrollment
MPS - Traditional Schools	$13,318	48,910
MPS – Specialty Schools (selective requirements)	$13,318	10,912
MPS – Charter Schools	$9,000 - $13,318	12,072
MPS – Other (partnership, selective, other)	$13,318	11,758
Subtotal MPS (all forms)		*** 83,652**
Charter – Non MPS (City or UWM)	$7,775	5,011
Private – Choice	$6,442	19,947
Private – Religious and non-religious	Up to $11,000	7,563
Suburban Schools – Milwaukee students	At Cost	6,910
Total Enrollment – All Above		**123,083**
* Includes 849 students from outside of Milwaukee		

Table 1. The Milwaukee System of Schools.

[5] (Levine, Marc, 2010)
[6] (Levine, Marc, 2010)
[7] (Levine, Marc, 2010)
[8] (Poston, Ben, 2009)
[9] (Milwaukee-Wisconsin, 2011)
[10] (Poston, Ben, 2009)
[11] (Milwaukee Metropolitan Chamber of Commerce, 2010)

The Milwaukee system of education is often characterized as an "ecosystem". This "ecosystem" consists of Milwaukee Public Schools, (neighborhood, specialty, contract and instrumentality charter schools and partnership schools), independent charter schools and private schools (most of which participate in the Milwaukee Parental Choice Program. While they are not considered to be part of the City of Milwaukee educational "ecosystem", there are schools in the suburbs that have Milwaukee students attending, either through Chapter 220 (a program created to support desegregation) or Open Enrollment.   A breakdown of the number of pupils attending Milwaukee's various school options and associated costs appears in Table 1.

As Table 1 illustrates, Milwaukee's parents are taking advantage of their opportunity to choose the type of education their students will receive. The range of options has allowed parents to identify schools they believe fit their educational needs.

Milwaukee Public Schools

Milwaukee Public Schools were established in the 1850's. The first school appears to have been a high school, founded in 1857. Soon after that one of the nation's first kindergartens was established. For the 2010-11 school year, there were 184 schools in the MPS system. These schools included Neighborhood schools, contract schools, specialty schools, instrumentality charter schools and partnership schools. In this period, MPS had an enrollment of 82,444 students with a school-based staff of 9,958 FTE employees. The student demographics were: 80.9% low-income, 56.6% African American, 22.6% Hispanic, 11.9% White and 8.8% classified as Asian, Native American and others.[12] Students were served in 118 elementary schools, 8 middle schools, 40 high schools, and 18 schools with combined grades.

Neighborhood Schools
Accept children from the neighborhood, before enrolling children from other areas, but will take students from its region, if seats are available.[13]

Specialty Schools
Neighborhood schools - enroll students, first from the neighborhood, then from the entire city, if seats are available. Offer special programs or areas of study, such as the arts.

Citywide - enroll children from all over the city and offer special programs or areas of study, such as the arts. In most of these schools, 55% of the students in entry level grades come from the school's walk zone. A walk zone is a one mile radius for elementary, and a two mile radius for middle and high schools. There are some exceptions allowed to certain schools. [14]

Instrumentality Charter Schools

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[12] (Milwaukee Public Schools, 2011)
[13] (Milwaukee Public Schools, 2011)
[14] (Milwaukee Public Schools, 2011)

Charter schools are somewhat independent do not have to follow many of the regulations set for regular schools and, therefore, can be more flexible. For example, some use enrollment processes different than other district schools, and set their own transportation schedules. Charter schools that are part of the MPS system are known as instrumentality charters.

Partnership Schools
Partnership Schools serve students who are identified as being at risk of dropping out or who are experiencing difficulty in the traditional school setting.[15] These schools are governed in part by the Children At Risk Statute (WI stat 118.153).

Private Schools

There are 127 private K12 schools in Milwaukee.[16] Most of these schools participate in the voucher program with no limitations on enrollment level of students covered under vouchers. Other schools choose to limit their participation. All private schools are not required to report data to the state. It is therefore difficult to compare and contrast data for private schools with other types of schools.

The Milwaukee Parental Choice Program

The Milwaukee Parental Choice Program (MPCP) began in 1989 and is the oldest and 2nd largest publicly funded voucher program in the United States.[17] Vouchers have allowed low-income parents to enroll their students in private schools at no cost to the student's family. The number of schools participating in the MPCP has grown from 7 to 112 private schools with an estimated growth in student enrollment from 337 to 20,189.[18] Eighty percent of the students participating in the MPCP are from racial or ethnic minority groups. Sixty-one percent of all choice participants are Black.

There is conflicting evidence that school choice programs such as MPCP can lead to improved academic achievement, especially amongst African American students. However, there is evidence that on average, MPCP schools graduation rates are 18%higher than those at MPS.[19] As indicates, this higher graduation rate is achieved with a much lower level of resources.

During the 2008-09 school year, the MPCP enrolled 19,739 students in 125 private schools making it second in size to MPS. Its survival and development are crucial to meeting the educational needs of low-income students in the City of Milwaukee.[20] There is sufficient evidence that parents are greatly satisfied by MPCP. Arguably the enrollment numbers speak for themselves, as parents are voting with their feet.

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[15] (Milwaukee Public Schools, 2011)
[16] (Department of Public Instruction)
[17] (Christopher B. Swanson, 2009)
[18] (Accurate Information About School Choice, 2011)
[19] (Milwaukee Voucher Program Boosts Student Graduation Rates, 2011)
[20] (Marsh, Jay Greene & Ryan, 2009)

Milwaukee Charter Schools

With the passage of Wisconsin Statutes Section 118.40 in 1993, public educational options in Milwaukee expanded to include charter schools.[21] In 1995, the legislation was changed to allow 2 subgroups of charter schools to form: district charter schools and independent charter schools.[22] District charter schools were authorized by MPS and operated as either instrumentality or non-instrumentality schools.

Beginning in 1997, Milwaukee's independent (2R) charter schools could be authorized by one of 4 entities within the city: MPS, the City of Milwaukee Common Council (MCC), the chancellor for the University of Wisconsin-Milwaukee (UWM) and the Milwaukee Area Technical College (MATC).[23] The legislation gave MPS, MCC, UWM and MATC the authority to act as gatekeepers for the city's charter school system and therefore be responsible for ensuring that charter schools meet state standards for education.

There are now 26 independent charter schools (9 chartered by MPS, 10 by UWM, and 7 by MCC) and there are plans for 3 new independent charter schools to open in the fall of 2011. Successful schools are expanding and developing their own school management organizations to support their expansion. There is also sufficient evidence that parents are very satisfied with high quality, independent charter schools. [24]

Comparing the Results

There are not many objective criteria that can be used as a basis for comparing MPS, Independent Charter, and MPCP schools. However, one measure is the Wisconsin Knowledge and Concepts Exam (WKCE) results. Table 2 displays the percentage of students, in the three educational sectors, who scored proficient or advanced when taking the WKCE standardized test.

The data seems to show that Milwaukee's charter schools have been producing better math results in 3rd through 8th grade, while producing results on par with MPS in reading in all grades. The data also suggests that MPCP reading results are below the citywide average in the early grades, but are on par with the MPS and Independent Charter schools in grades 6 through 10.

Recent Changes to the Milwaukee Education Ecosystem

The 2011-13 Wisconsin State budget promulgated significant public policy changes to the Milwaukee Education Ecosystem.

MPS

- The most significant change to the Milwaukee Public Schools is the reduction is general school aids statewide. MPS indicates it will lose about $84 million in state aid/spending authority,

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[21] (Robert La Follette School of Public Affairs, 2004)
[22] (Robert La Follette School of Public Affairs, 2004)
[23] (Robert La Follette School of Public Affairs, 2004)
[24] (Richards, Erin, 2011)

approximately $1000 per student. Because the district had recently ratified a four year contract with the Milwaukee Teachers Education Association, they were not able to require the health care and pension contributions included in Governor's Walker's budget. This resulted in layoff notices to 519 teachers and other staff.

- The legislature passed Senate Bill 20 (WI Act 17) giving the Milwaukee Common Council the ability to sell city-owned surplus MPS facilities to other education operators such as choice and charter schools.

• Grade, Subject	MPS	Independent Charter	MPCP	Citywide
3rd, Reading	62	61	51	**58**
3rd,, Math	50	55	30	**45**
4th, Reading	62	64	51	**59**
4th Math	57	59	37	**51**
5th, Reading	64	64	55	**61**
5th, Math	56	63	34	**51**
6th, Reading	66	62	61	**63**
6th, Math	55	60	38	**51**
7th, Reading	67	64	64	**65**
7th, Math	51	54	39	**48**
8th, Reading	66	64	65	**65**
8th, Math	48	49	35	**44**
10th,Reading	40	39	35	**38**
10th, Math	32	32	23	**29**

Table 2. Percentage of Students Proficient on WKCEs.[25]

Milwaukee Parental Choice Program

- MPCP Enrollment Cap Eliminated. As part of making the program even more assessable to students, the legislature eliminated the long standing limit to the number of children that could participate in the program each year.
- The income eligibility limit on the MPCP has been increased. The program was previously only available to families at or below 175% of the federal poverty line (approximately $34,000 per year for a family of 4). The MPCP is now available to families up to 300% of the federal poverty line (approx. $67,000 for a family of 4).
- A change was made to allow children who qualify for the program once to remain until they graduate or leave voluntarily without having to verify household income each year. This will limit student mobility, a significant challenge for urban districts, and streamline the administration of the program.

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[25] (Wisconsin Department of Public Instruction)

- Any school in the State of Wisconsin may now participate in the Milwaukee Parental Choice Program. This will afford Milwaukee families many additional education options as suburban private schools enter the program.

An additional legislative change that impacts the ecosystem was Senate Bill 20, giving the Milwaukee Common Council the ability to sell city-owned surplus MPS facilities to other education operators such as MPCP and charter schools.

While the outlook for MPCP schools is positive, the outlook for charter schools is uncertain.[26] One of the pieces of legislation, that did not survive, sought to strengthen the charter school law. The current political environment may be too risky for any politicians to reintroduce this legislation again in the next or near future sessions.

The Need for High Performing Schools in the Milwaukee Ecosystem

Although there are a variety of options in the "ecosystem", there is a solid consensus that there are not enough high-performing classroom seats available in the city of Milwaukee. In fact, as displayed in Figure 1, there are areas in the city in dire need of quality classroom seats at the high school and

Zip codes with the greatest need for performing elementary schools

53206 – 4,327 Seats
53209 – 4,186 Seats
53212 – 2,204 Seats
53216 – 2,978 Seats
53224 – 2,480 Seats

Zip codes with the greatest need for performing high schools

53206 – 2,108 Seats
53209 – 2,076 Seats
53218 – 2,637 Seats
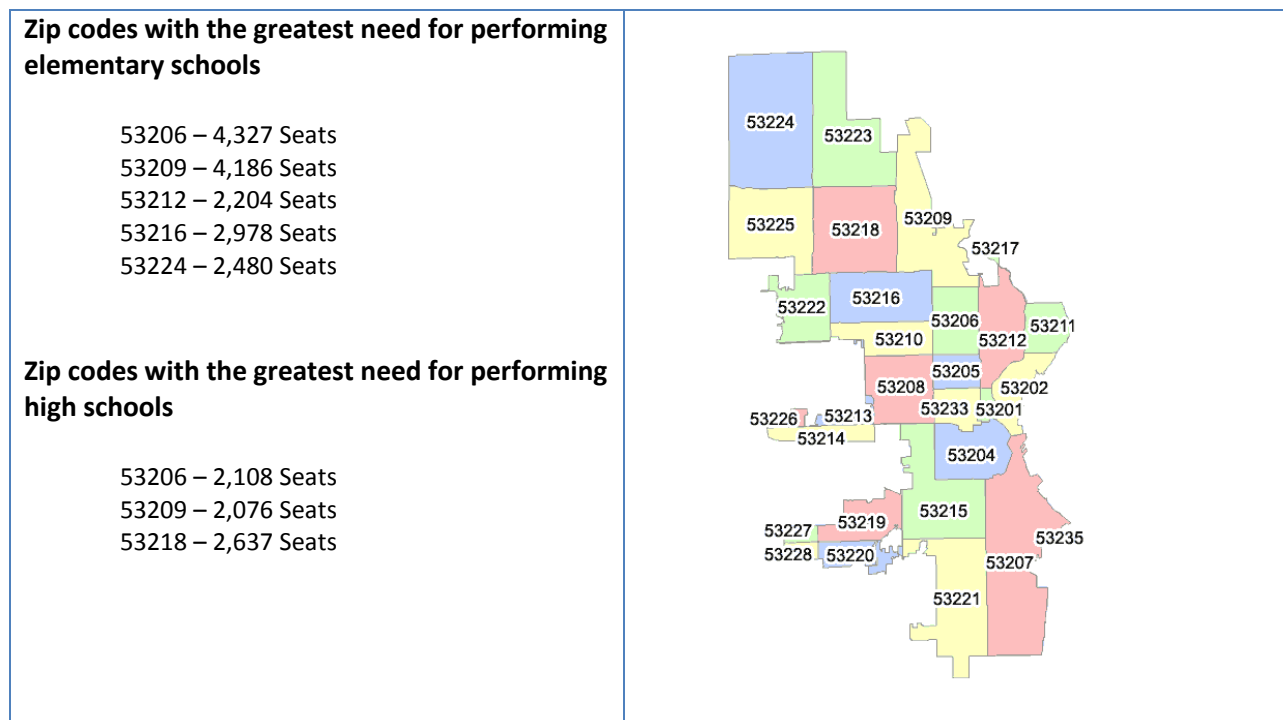
Figure 1. Milwaukee Neighborhoods with the Greatest Need.

[26] (Borsuk, Alan J., 2011)

Elementary school levels.[27] The number of classroom seats indicated for each zip code, shows a gap between school capacity to serve and what is being provided that meets the quality standard, where the standard is determined by number of students that are determined to be proficient or advanced by the states standardized test.[28]

Using the data provided, there is a strong need for quality schools located on the north side of Milwaukee, where the vast majority of low-income Black students live and this is the area of the city that Quest will place its schools.

Why Quest?

The Constraints of the Current Educational Models

The often referred to 'K12 factory' has its roots in the industrial age and the goals for the current design have not changed much for the last 100 years – to ensure access for students.[29] Meanwhile the structural costs associated with school have changed dramatically in that same timeframe. The K12 system of schools is no longer financially viable.[30] The structural costs associated with schools increases from 4 – 8 percent per year. Schools are stuck with raising more capital, through fund raising or taxation, or increasing class size to make up for these structural costs.

Billions have been spent on computers and little has changed in the way that teaching and learning occurs.[31] Technology, and its ability to individualize the educational experience, is able to deliver the type of personalization that we have become accustomed to in nearly every other area of our lives.[32] One promising method of instructional delivery is blended learning, where students spend part of their time supervised by a classroom teacher and part of their time receiving instruction through on-line learning.[33] That data is now showing that blended learning is proving to be more effective than traditional instruction.[34]

Another recent area of innovation is in the implementation of high productivity education models. These models seek to overcome some of the 'K12 factory' limitations by harnessing untapped student productivity potential and by enhancing teacher productivity.[35] However, generally accepted metrics for educational productivity don't exist yet.[36] And while high productivity models hold the promise of

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[27] (IFF, 2010)
[28] (IFF, 2010)
[29] (McDonald, 2011)
[30] (McDonald, 2011)
[31] (Christensen, 2008)
[32] (Software & Information Industry Association, 2010)
[33] (Staker, 2011)
[34] (McDonald, 2011)
[35] (McDonald, 2011)
[36] (Bosworth, 2004)

providing more results for the same or fewer resources, there is a need to also consider the quality of the instructional programming provided.

The current state of the art in educational quality seems to resemble that of the service quality movement in the late 1980's. End of semester assessments and interim assessments might be compared to the quality checks performed, just after a service or product was delivered to a customer. There is room for the adoption of a multitude of higher level quality tools in future educational models. There is also a need for generally accepted metrics for educational quality.[37]

One tool that will find immediate adoption is the Cost of Quality model, which seeks to quantify the costs of assessment and then to shift efforts upstream from service delivery to service delivery design, which save an order of magnitude in resources.[38] There are a host of other quality tools and methodologies that can assist educators in digesting and acting upon the growing amount of data that is becoming available to them. Quest will use a number of these tools to improve our use of data.

Quest New Vision, Mission and Values

Quest aims to bring the best in class educational experiences to students who need it the most. Quest is formed through the eyes of the quality imperative and is based on a philosophy of continuous improvement to obtain and maintain the best educational results possible for the students and families we will serve. Our commitment is reflected in the Quest Vision.

The Quest Vision

The vision is "To be the most effective network of schools in the United States at closing the achievement gap".

Mission

The mission is "To ensure that all of our students are college ready at graduation".

Quest Beliefs & Values

Quest believes in serving low-income and underserved communities by:
1. Preparing students for life-fulfilling options, including: attending college, joining the workforce, becoming an entrepreneur, or actively participating in the democratic processes of this country,
2. Creating an expectation of doing one's best in each endeavor,
3. Addressing the individualized needs of each student,
4. Providing a quality investment in human capital,
5. Facilitating effective parent engagement, &
6. Creating a school commitment of reinvestment in our community.

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[37] (The American Enterprise Institute & Center for American Progress, 2009)
[38] (Thomson, 2006)

Quest Strategies and Objectives

Quest schools will operate in accordance to the Quest Vision, Mission, and Beliefs; while observing the following strategies:

1. Making data-based decisions at all levels. Classroom Examples: interim assessments, authentic assessments, school culture metrics. Administrative Examples: administrative cost per student, parent communications effectiveness, and school to school comparisons. Board Examples include: network operating effectives, network academic performance, and network benchmarking. More specific metrics include:
   a. Matriculating 8th graders will have passed 3 high school courses, prior to 9th grade.
   b. That 12th grade graduates will have passed 4 AP or college level courses, prior to their freshman year of college.
2. Maintaining a culture that embraces and strives for continuous improvement. Examples include: A team based structure that understands the nature of processes and seeks to improve them.
   a. The Center of Support costs are reduced by at least 1% every year.
   b. That Quest students, schools, staff, and the Center of Support will always seek to create and exceed their organizational and personal bests in performance.
3. Creating an environment that supports the relentless and collaborative pursuit of results
   a. That Quest graduates will achieve an average of 21.5 on their ACT tests.
   b. That Quest schools will exceed the state average on the mandated achievement test.
4. Finding and supporting passionate, talented and resilient teachers, leaders and board members
   a. Achieving a staff retention rate of 90% after the first 5 years of operations.
   b. Compensating staff at a rate above the area district average.
5. Establishing relevant and rigorous high standards (operational and academic)
   a. Quest 12th grade graduates will have a remediation rate that is 10% or less than that of their peers, with the ultimate goal of 0% remediation for our graduates.
   b. All Quest 12th grade graduates will have served at least 100 hours of community service or interning by their graduation.

These objectives will become the standards for evaluating the actions of all stakeholders: Quest staff members, students, parents, adult volunteers and anyone whom we enlist for the purposes of fulfilling the Quest Vision.

The Quest Educational Model

The Quest Business model was developed through observation, research and review of the best practices and promising practices used by established and emerging school networks and systems. Development of the Quest Business Model is the result of collaboration between the Quest Board of Directors, the Quest Executive Director and staff members of The Institute for the Transformation of Learning.
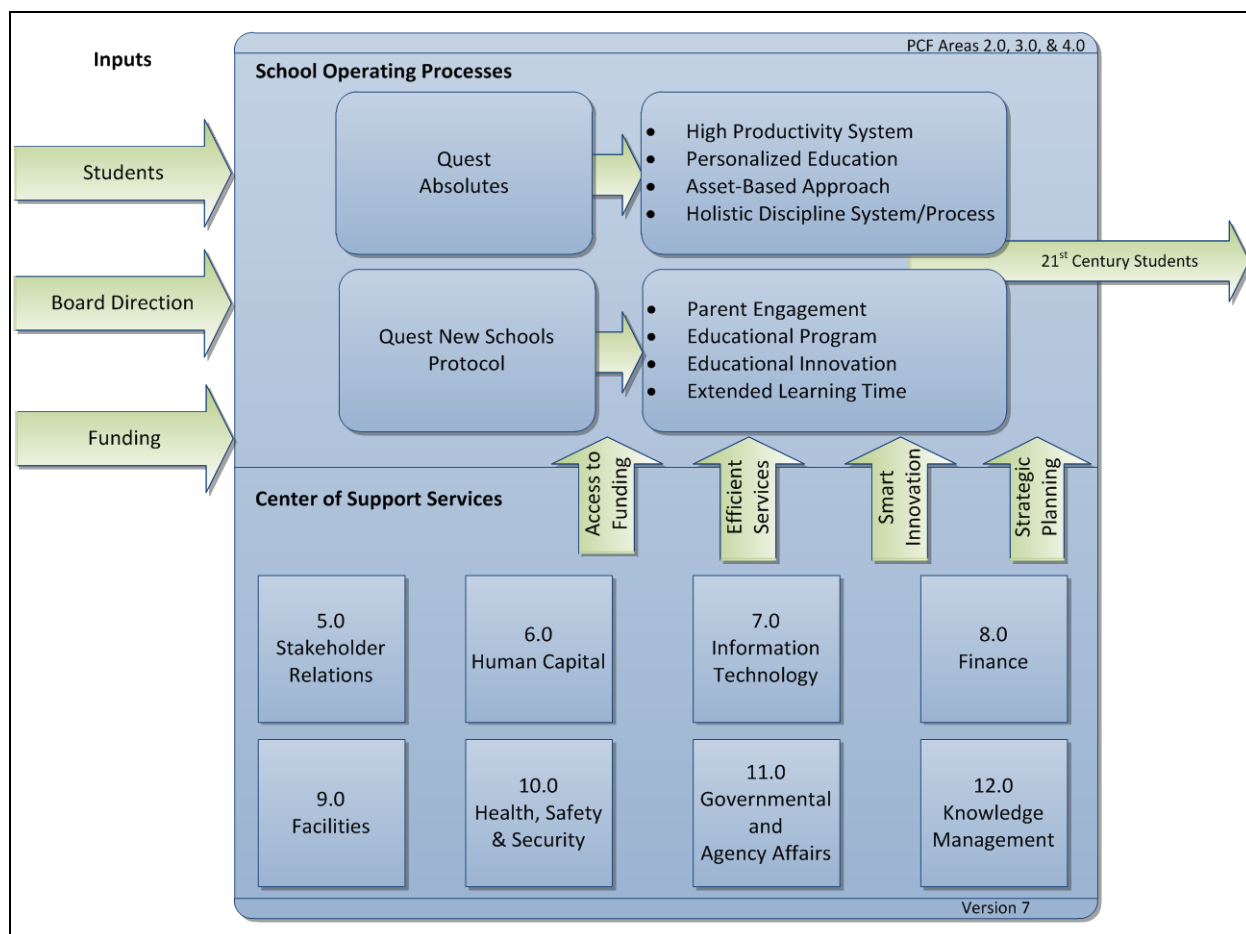
Figure 2. The Quest Model.

The Quest Network will be comprised of our 3 schools and the Center of Support (CoS). The organizational umbrella will be Quest-Milwaukee. The home office will be referred to as the Center of Support. In Figure 2 processes pertaining primarily to schools are organized under School Operating Processes. Processes that are common between schools are organized under the Center of Support. These two systems are detailed later as part of this business plan. Each of the model inputs and outputs and the benefits for our schools are briefly discussed below.

Model Inputs

Students
As a publicly funded Charter School, Quest will provide a quality educational experience to all students seeking an education that will prepare them for college or other career aspirations.

Board Direction
Quest will assemble a board of directors that will represent a broad and deep level of experiences that will assist the organization as it develops and grows. The board input to the model will be guidance in the overall direction of the network, via direct supervision and oversight of the Executive Director.

Funding

Funding is needed for the startup phase of the Quest Center of Support (CoS). The purpose of this funding will be to provide resources for planning additional schools, as well as preparing school directors; prior to each school opening. Funding is an ongoing input, even after the organization has reached scale. At scale, this input will be per pupil funding from the state plus a modest amount of 3rd source funding. The specific funding requirements are discussed later in this document.

Model Benefits to Schools

Access to Funding

One benefit quest schools will have is access to funding. Individual schools rarely have the resources to conduct appropriate fund raising that reduces their dependence on per student allocations from the department of public instruction. Quest will have the ability to present a more compelling story to potential funders.

Efficient Services

Another benefit to Quest schools is the shared cost of overall administrative services. Schools will share administrative services focused on their individual and collective success. This support will avoid each school building its own business, or back-office functions. The Quest CoS will obtain an economy of scale through volume purchasing of goods and services and avoid duplication of the administrative structures that stand-alone charter schools must establish.

As additional Quest schools are started, each school's allocation of expenses will decrease for shared services delivered by the CoS. This will allow each school to use a higher percentage of funding for resources that directly benefit students.

Smart Innovation

An additional advantage that schools will enjoy is constant and consistent benchmarking against schools with very similar systems and processes. Understanding or controlling process variation is the key to the success for all process-based activities.[39] Internal benchmarking will speed continuous improvement efforts, by allowing schools to better understand the impact of internal and external sources of undesired process variation and then to rapidly improve those processes to maximize effectiveness.

Long Range Planning

Schools are typically hard-pressed to conduct long range planning. The CoS will incorporate this into yearly planning activities to ensure that strategic planning occurs at the network and school level. The activities will be structured to produce outcomes that benefit each school, without sacrificing innovation at the school level.

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[39] (Education, 2010)

Model Output

Quest will produce students who possess skills relevant in the 21st century. These skills will be aligned to the Common Core standards and additional standards, which are considered to represent essential skills for the future.[40] Quest graduates will possess 21st Century skills and be prepared to go on to college or the vocation of their choice.

Quest Operating System

This section describes the operating system that Quest will implement to fulfill the Quest Mission. The system has two major areas under which activities are organized. 1) School Operating processes - which are to be implemented at the school level and monitored by management. 2) Management and Support Services - which are implemented by the Quest Center of Support (CoS). The CoS is what some charter management organizations refer to as the home office.

School Operating Processes

The Quest School Operating Processes are education processes that will be at the core of each school's operations. Processes are the purposeful steps that need to occur in order for an output, outcome or a result to happen.[41] There are two types of Operating Processes:

Quest Absolutes are those concrete processes and systems that Quest-founded schools must use with a high degree of fidelity. The use of these processes is non-negotiable and their implementation will be consistent throughout the network. The presence of these absolutes is needed to differentiate Quest schools as part of a high performing system. The absolutes are: *High Productivity System, Personalized Education, Asset-Based Approach, and Holistic School Discipline*.

The **Quest New School Protocol** includes elements that are felt to be less prescriptive in how they are implemented by each school. However, their inclusion is a given. Exactly how these processes are implemented will require the input and shaping of the School Director selected for each school. The process of developing the School Director will be informed by each School Director's conception and coherence to the Quest Vision, Mission, Beliefs, and Values.

The implementation of the protocol is in response to the query of 'how' to bring the Beliefs and Values into more concrete existence. The Protocol elements include: *Parent Engagement, the Education Program, Educational Innovation, & Extended Learning.* In the text that follows, there is a discussion of each of these elements and some of the major process areas that comprise each functional area.

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[40] (Partnership for 21st Century Skills, 2007)
[41] (Education, 2010)

EdVisions Meets Carpe Diem
The overarching design for Quest is framed by and draws generously from two very successful educational organizations – EdVisions and Carpe Diem Online Schools. EdVisions is a network of schools with a distinct philosophy about project-based learning. EdVisions opened their first school, Minnesota New Country School, in 1994. Today the network supports 38 schools, operating in 11 states.[42] EdVision students have tended to score just above the state average on ACT test and well above average on less-tangible, but equally important, socio-emotional metrics.[43]

EdVisions Attributes	Carpe Diem Attributes
Teachers are coaches	Teachers are coaches
Technology is a tool for developing projects	Technology is the delivery platform for learning
The learning spaces are relatively defined	Personalized, any-time, any-place learning.
Learning is explicitly relevant	Learning is guided by external standards
Projects enable integration of subject areas	Subject area performance is maximized
The learning is highly self-directed in content	Learning is highly self-directed in pace
Projects support community building	Learning is highly independent
Relationships are highly valued	Relationships are highly valued

Table 3. Comparison of EdVisions to Carpe Diem.

Carpe Diem Collegiate High School is a blended learning school located in Yuma, Arizona. The operator of the school, Carpe Diem Online Schools, runs additional on-line charter schools that operate in the Yuma area.[44] The Yuma campus serves over 250 students at a brick and mortar location and is considered one of the best implementations of blended learning in the nation.[45] Carpe Diem has the highest achievement gains in the state of Arizona.[46]

In Table 3 we compare the attributes, as we understand them, of Carpe Diem and EdVisions. There are probably other dimensions to compare, but these attributes resonate most deeply with the Quest educational model. Later, in Table 6, we provide a deeper integration of these attributes to state explicitly those qualities we believe are most important for Quest schools to possess.

Overview of the Process Classification Framework

In designing Quest, several organizational frameworks were investigated as vehicles to unify the various functional elements of the organization. After closely reviewing the Aldridge Educational Criteria and ANSI Standard Z1.11, a schema inspired by American Productivity and Quality Center (APQC) was adopted. APQC is an association that seeks to assist organizations in understanding and improving their

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[42] (EdVisions, 2009)
[43] (EdVisions, 2005)
[44] (Carpe Diem Online Schools)
[45] (The Heartlander)
[46] (Greene, 2010)

processes. They have developed frameworks for multiple industry sectors and Quest has adopted Education Framework.[47]

We present the Quest processes within the context of this framework as a way of focusing overall school and CMO design considerations. The framework has facilitated developing specific procedures and focusing overall organizational continuous improvement efforts. Quest has developed a Financial Policy and Procedure manual, and has begun developing a Human Capital Manual.
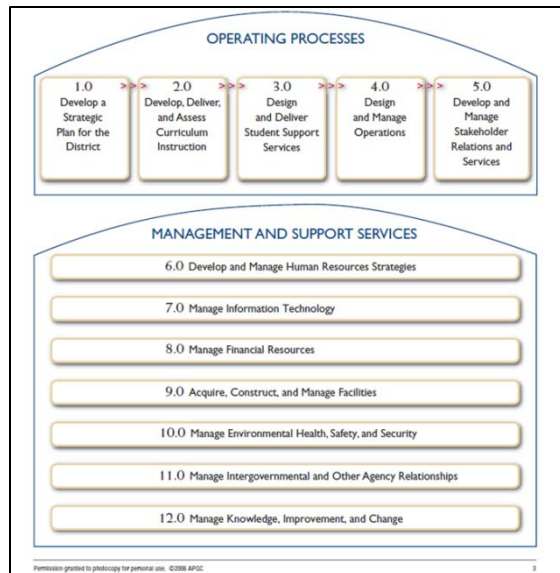
Figure 3. APQC Framework for Education.

The process framework provides a hierarchy for the educational and non-educational activities and processes that should exist in any school network or system. The areas presented, while extensive, may not be exhaustive. As other process needs are identified, the structure allows extension by adding new processes and activities to the framework.

Another advantage in using this framework is that it provides an external reference point. This externally referenced classification framework helped to minimize bias in developing the Quest organizational design by allowing the focus to on what it takes to make that organization effective. In the future, Quest will be able to benchmark other similarly structured school systems, which also use the framework for continuous improvement efforts.

1.0   Strategic Planning

The vision for Quest is " . . To be the most effective network of schools in the United States at closing the achievements gap.". Quest schools will embody the Beliefs and Values stated earlier and our strategic planning will be guided by this vision.

Upon approval of the Quest Business Plan, the Implementation Plan will be reviewed and executed. The Quest teams will implement metrics that track the degree to which each school possesses the Beliefs and Values, which will enable Quest leadership to ensure that strategies articulated in the model are being effectively implemented.

Development and Implementation Plan

The scope of the implementation plan creates the Center of Support (CoS) and each school. The complete plan spans 10 years and has three major components that are covered more in-depth later in

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[47] (APQC, 2011)

this document. Those two components are the Financial Plan and the Growth Plan. The Growth Plan is divided into 3 phases. The Phase 1 entails all of the task need to open the 1st school. The Phase 1 Task List is listed in its entirety later in this document. At the end of each section, we have included a subset of the Phase 1 Task List for reference purposes.

New School Protocol

The first school director will need to be an experienced school leader. This school leader will be selected to act as a co-developer of the school processes of the network. He or she will receive additional professional development through execution of the New Schools Protocol, detailed in Table 4. It is anticipated that subsequent directors will be selected from existing Quest schools, as they will already have a very clear understanding of how the model is intended to function and any implementation issues still needing attention.

Establishing each new school will require the attention to detail that fosters maximum creativity, at the school level, balanced with the overall organizational needs of Quest. The New School Protocol is designed to allow an interning School Director the opportunity to shape their school to the educational focus that resonates deepest with him or her and yet allow the integration of the Quest Absolutes.

Protocol Activity	Quest Aligning Element	Thought Partners
Develop the educational focus for the school through design specifications for projects and inquiries.	Educational Focus	Project Based Learning Partners (Great Lakes Constructivist Consortium, EdVisions, Project Foundry, or Big Picture) Instructional Platform Partner (Education Elements)
Develop protocols and processes to ensure that students direct their instruction within the Common Core standards framework.	Personalized Education	Project Based Learning Partners (Great Lakes Constructivist Consortium, EdVisions, Project Foundry, or Big Picture) Instructional Platform Partner (Education Elements)
Develop a Parent Engagement Program using a variety of methods including, student-led conferencing and social media.	Parent Engagement	Inquiry and investigation with Great Lakes Constructivist Consortium, Ed Visions or Big Picture. Social media with EdModo.
Develop an approach to extended learning time and extended learning.	Extended Learning	Discussions with Building Excellent Schools, KIPP, Ed Visions, Project Foundry, or Big Picture

Table 4.The Quest New School Protocol.

After the first school is opened, each additional interning School Director will be required to learn CoS processes. They will spend part of their internship visiting schools that use similar approaches and part of their time performing the Protocol activities. They will plan operational details for their schools, prior

to each school being in operation, and share their accomplishments and challenges with Quest Leadership.

This activity will assist School Directors in their future assignments when they collaborate with the CoS staff and help prevent the establishment of functional silos.[48] Once this information is integrated into the Quest network, the CoS will assist School Directors in executing the design and establishing effective benchmarks to ensure that the design is implemented with a high level of integrity.

Progress Monitoring for the Strategic Plan

Milestones for the implementation plan will be driven by the Executive Director and his staff and monitored by the Quest Board of Directors. Monitoring the strategic plan will be accomplished via a score card or metric page that will provide feedback as to the effectiveness of operational activities against the strategic plan.[49] This score card will be balanced in displaying leading and lagging indicators and will assist leadership in determining how the organization is making progress against strategic goals. This set of indicators will also provide the board with information needed in determining how effectively Quest activities are aligned to the Vision.[50]

Continuous Improvement teams, discussed later, will have the responsibility to ensure that suggested improvements are in alignment with the strategic plan. They will do so by gaging all improvements against the metrics that they are responsible for. While not setting the strategic direction, they will be responsible for developing improvements that will aid Quest in becoming a high productivity organization. Phase 1 tasks related to Strategic Planning are listed below.

Task ID	Strategic Tasks	Person Responsible	Months Before School #1`Opens
4	Complete Charter Application	Executive Director (ED)	19
5	Submit Charter Application	ED & Board of Directors	18
7	Charter Application for School #1 Approved	Board of Directors	15
8	Expand Board of Directors	Board of Directors	15
46	Finalize School Protocols for School #1	ED & Co-Developer (1st School Dir.)	6
79	Open School #1	1st School Director	0

2.0   Development and Delivery of Curriculum and Instruction

The design goals for instructional program effectiveness are discussed in this section of the Business Plan. While instructional processes are integral to the school, in some schools the processes are not always clearly delineated. Some educators view the results of the achievement gap as a deficiency in

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[48] (Lencioni, Silos, 2006)
[49] (Brussee, 2006)
[50] (Norton, 1996)

process management.[51] Inspired by this belief, Quest has identified instructional processes that are integral to the model's effectiveness and those processes have received special attention during the Quest design work.

After the first school, each additional school design will be the responsibility of the Quest School Design Team, comprised of the incoming School Director, the Executive Director and his/her direct reports. Although the charter application stipulates a high level of detail, this team will develop and execute project plans to ensure that the final details for each school are brought to fruition on time and under budget. The specific processes that make up this area are delineated below.

Curriculum Development

*Quest seeks t*o be the most effective network of schools in the United States at closing the achievement gap. – The curriculum that meets this requirement must be rich and deep. The curriculum must be capable of moving students at a pace of more than 1 year of academic progress in each school year. The curriculum must also have capability of discerning individual student needs and quickly responding to the needs of students who come to the school several years below level.

High Productivity System

The Quest network of schools will utilize high productivity approaches to learning which maximize the use of finite funding and teaching resources.[52] Blended learning offers the opportunity to rethink how learning occurs and for Quest schools to maximize the use of resources.[53] From a productivity standpoint, the model closest to what Quest is proposing is Carpe Diem On-Line School in Yuma, Arizona.[54]

The Quest model will revolve around the use of the Flex Blended Learning model. "Programs with a flex model feature an online platform that delivers most of the curricula. Teachers provide on-site support on a flexible and adaptive as-needed basis through in-person tutoring sessions and small group sessions".[55] This model is a paradigm shift away from the how most schools operate.

Part of this paradigm change involves how student labor is harnessed. In the typical classroom, students far outnumber teachers. However, the teacher's labor is fully utilized, while students have untapped potential to work.[56] This source of labor remains largely underutilized. Quest will ensure that student labor is fully utilized, which has the benefit of more fully engaging each student.

[51] (Education, 2010)
[52] (Bosworth, 2004)
[53] (Christensen, 2008) (Staker, 2011)
[54] (Innosight Institute , 2011)
[55] (Staker, 2011)
[56] (McDonald, 2011)

Harnessing student labor will be a challenge, unless students are given some responsibility for self-direction.[57] All students welcome the opportunity to work at educational tasks that they see as relevant to real world needs.[58] Quest schools will place students at the core of their learning, both as planners and as participants.

Personalized Education

There is no one curriculum that is right for every student.[59] It is important to know where each student is in his or her journey and then to assist each student in making progress with their journey. Quest will ensure that each student receives a high degree of personalization in their educational experience. This will be accomplished through a mixture of projects and student learning plans, which students will author; with assistance from the parents, guardians or teachers.

However, full personalization cannot take place at scale, without technology.[60] Technology becomes an enabler for the level of differentiation needed in our schools. Quest schools will harness the power of e-learning, on-line assessments, dedicated social media, and academic data delivered to the desktop; to ensure that each student receives all the support needed for them to realize their educational aspirations.

Asset Building Approach

Quest will incorporate an asset building approach for each student. Students will be encouraged to recognize their areas of strengths and build on them. Projects assessments will incorporate assessments of specific developmental competencies. Quest will consider the Developmental Assets designed by Search Institute, the competencies that Alverno College uses as part of their educational processes, or the competencies adopted by EdVisions.[61] All three of these approaches are holistic in their approach.

This approach will include a reflective planning process for each student. The level of rigor in this process will be grade appropriate, and documented electronically via an on line service. Purchased services under consideration are e-portfolio[62] and Project Foundry.[63] Students will use information from their e-portfolio as part of gaining an understanding of their strengths and building on those strengths, through multiple iterations of reflection and work. A parable illustrating student life at Quest is included later in this business plan.

School Discipline

Great effort and attention will be given to creating a school culture where progressive discipline is not the norm. Part of creating this culture is to recognize that students, who direct their own learning, have

[57] (Newman, 1998)
[58] (Newman, 1998)
[59] (Littky, 2002)
[60] (Software & Information Industry Association, 2010)
[61] (Newell, 2003)
[62] (e-portfolio, 2011)
[63] (Project Foundry, 2011)

very different relationships with their peers.[64] However, a discipline policy that is uniform across the network will be developed. This policy will be among the elements presented to students during their orientation to the school and will stipulate the boundaries that must be respected to ensure a safe learning environment.

The school discipline policy and its effectiveness, as well as the communications and professional development that support the policy, will be reviewed in an ongoing basis by the Discipline and School Culture team. Consistency in application of the policy is essential to Quest. Any changes in policy will be brought to the Leadership Team for consideration.

Standards Based Curriculum

The primary instructional e-learning platform will be aligned to the Common Core standards. The Common Core standards will provide an overarching guide for instructional content, regardless of the delivery method used. While the standards articulate what will be taught and impact how each school measures academic performance, teachers will have a high degree of flexibility in determining how to ensure that the instruction fulfills the requirements of each Common Core standard.

Quest will seek to provide as much transparency as possible as to what constitutes each standard and which curricular resources support each standard. Teachers, students and parents will have access to the level of curricular resources that they need, via the Quest intra/internet. Students will be empowered to use those resources to meet their needs at the moment that they have the need.

School Culture

Quest will design specific programming to use during incoming orientations (boot camps) that will be based on The 7 Habits for Highly Effective Teens, for the middle school students and The 7 Habits of Highly Effective People, for high school students. This will assist staff in developing a common language to use with students and to give them a standard to assess their own behavior against. Staff will receive professional development to help students internalize the concepts presented by Dr. Covey.

Student Advisory will also be used to develop the school culture. To leverage staff resources in this area, a social media platform will be used. The platform Quest will use is Edmodo, which is a social media platform for specifically for schools. It allows students, teachers and parents to be linked together in on-line communities that are only assessable to school-related parties. These communities can be used as a vehicle to enhance communications in and out of the school. Parents can also be invited into these school communities.

Project Based Learning

Project base learning will assist students in tying together discreet knowledge and using that knowledge to develop higher order thinking skills.[65] Projects will be designed to elicit student work that touches a

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[64] (Littky, 2002)
[65] (Newell, 2003)

number of standards and each project will include details as to how the project will address the Common Core Standards and which of the current standards are being addressed. Each project will also be used as an opportunity for students to demonstrate their mastery of a smaller percentage of the previous years' standards. This will enable students to build a sense of relevancy to previously learn material.[66]

We will consider using project focus areas to establish specialty areas for our school, such as: Sustainability, Organizational Quality, Social Responsibility, Social Justice, Business Management, Non-Profit Management, or Music Arts.

A central tenet of our approach to projects is that each one will have a high degree of relevancy to the student and produce an outcome intended to improve the community they live in or the community immediately surrounding the school.

Parent Engagement

Getting and keeping parents involved at the middle and high school levels is a challenge. We will implement Student-Lead Conferencing as the method of keeping parents engaged in their students work and to help students produce the best work. Student-led conferences have been shown to help improve the quality of student work by involving parents in the presentations.[67] Quest will also make use of student demonstrations or presentations of projects as an opportunity to invite community into the school to see and encourage student performance.

Design and Delivery of Professional Learning

Professional development will be provided to support project based learning and to support the learning platform (e-2020 or K12) and the platform selected to house student work for demonstration purposes (e-portfolio or Project Foundry). The role of the teacher in a Quest school will be that of a 'connected teacher'. The type of role needed, will likely mirror that of those evolving roles at schools like Rocketship Education.[68]

Professional development for all Quest staff members will be planned according to systemic needs. The on-going professional learning needs will also be derived from analysis of student data, teacher performance data, and change initiatives that Quest sees as common amongst its schools and the CoS.

The Role of the Teacher

At Quest, the role of the teacher will differ dramatically from that of the typical teacher in a 'K-12 factory'. Quest will need to recruit, hire and support teachers who see themselves as 'connected teachers'. The difference that we see in the teacher's role is contrasted in Table 5.

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[66] (Jenkins, 2005)
[67] (Barnett, 2000)
[68] (Brinson, 2011)

Additional professional development will be determined upon the analysis of assessment data and assessing overall student needs. Improvement teams, described later in this document, will also provide data that will drive professional learning for staff that work more directly with the CoS.

Traditional Teacher	Quest Connected Teacher
Teacher seen as the Sage on the Stage	Teacher sees themselves as a guide, advisor or coach to students
Teacher feels the need to control student behavior	Teacher sees student behavior as an opportunity
Teacher 'sees' student deficits as something to be added to that will bring students up to level	Student are seen as possessing a set of assets and teachers see their job as guiding students through a discovery process that strengthens those assets
Teachers spend most of their effort (labor) imparting facts to students, working at the lower levels of learning	Teachers spend most of their time assisting students at the tasks of tying information together through activities aimed at higher order thinking skills
Teachers grade most student homework and assign grades	Teachers monitor the instructional platforms to ensure that all students are showing progress. Most grading and feedback occur on-line
Teachers assign students to remediation after 1st or 2nd quarter of school	Teachers assign students to remediation after no more than a week of below par performance
Teachers assign students to enrichment activities as time allows	Teachers assign students to enrichment activities after no more than a week of near maximum performance
Teachers provide information to all students, regardless of their needs	Teachers personalize information through a social media platform and through personal interactions, according to each students needs

<center>Table 5. The Quest Connected Teacher.</center>

School Culture

Prior to each school opening, additional professional development will be provided to ensure that each teacher is equipped to work as part of a collaborative team that supports student centered learning. The professional development will include topics touching on: working in a team environment, socio-emotional learning, and self-directed learning strategies.

After each school has been in operation, a large portion of the professional development will result from analyses by the Discipline and School Culture Team. Through continually assessing culture and monitoring the effectiveness of programming and communications, this team will be positioned to provide recommendations for professional development as well as provide some direct developmental opportunities for staff members.

Effective Instructional Programs

Most Quest students will be able to move through the curriculum in the 4 days per week of scheduled instruction. Fridays will be reserved for students needing extracurricular supports or their projects they are working on.

The use of blended learning and project-based learning will require a high level of collaboration between all teachers for the benefit of each student. The role of the teacher changes again with the incorporation of project-based learning.[69] The role shifts even more toward using practices that facilitate the acquisition of higher order thinking skills.[70] This shift is facilitated by allowing technology to be the primary conduit for instructional content aligned to lower order thinking skills, i.e. drill and practice and recitation of facts and figures.

Additionally, extended learning time and extended learning will both be implemented by Quest. Extended learning time is the additional instructional time that low performing students will need to close the achievement gap. Extended learning is creating the expectation that students will be responsible for instructional objectives previously taught.[71]
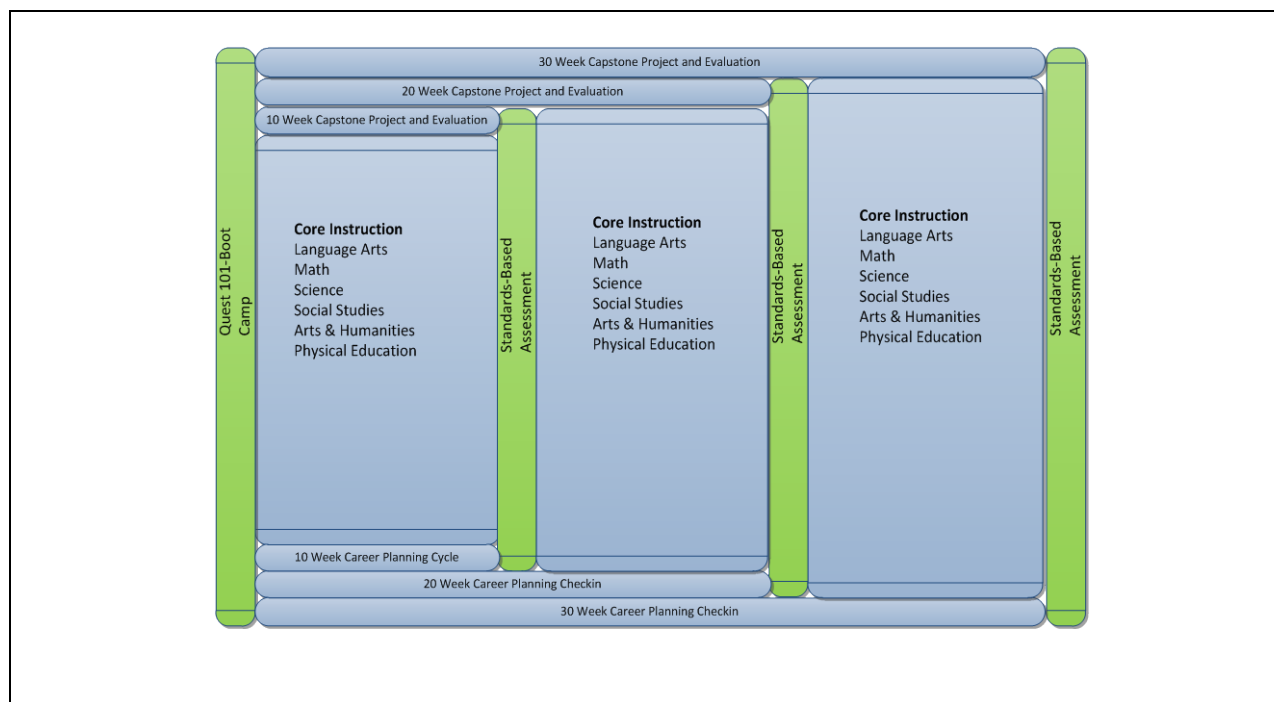
Figure 4. Quest Educational Map.

The Quest instructional model builds on the strengths of the Carpe Diem model and seeks to strengthen facets of that model with additional program elements. In discussions with Carpe Diem, they perceive two areas of weakness to be:

1. Workshop instruction in general, and
2. Hands on instruction in science.

[69] (Newell, 2003)
[70] (Churches, 2009)
[71] (Jenkins, 2005)

The Quest Educational Map was designed to help focus the enhancements we envision and to provide an organizational framework for additional design work.

Quest Educational Map

Quest seeks to build on the success of Carpe Diem and EdVisions by remixing and extending their models. In Figure 4 we show graphically how we intend to organize our instructional efforts. The primary instruction will be handled by instructional platforms with workshops for instructional extensions and remediation. Project Based learning will be used as the method of bringing relevancy to content strands and to integrate learning between strands. Periodic Career Planning meetings will allow consistent coaching to help ensure that students are making progress and staying on track.

These activities are sandwiched between a boot camp and a standards based assessment. The boot camp will ensure that students understand the culture and that Quest staff knows each student. The standards based assessment block will be the WKCE and whatever assessment is required by our chartering organization.

Quest Instructional Enhancements

We will enhance our workshop instruction through the use standardized instructional practices, including those outlined by Lemov. These practices include the use of 'do-nows' and 'exit tickets', both of which are tied to standards and executed on-line.[72]

Workshops will be used to remediate students in standards that they did not master and to provide curricular extension to students who need additional challenges. Student data will be reviewed during the week to determine the next week's schedule for workshops and which students should be scheduled into those workshops.

The introduction of brain-based learning, tied to data informed instruction promises to consistently provide greater than 1 grade per year of growth, helping to narrow the achievement gap.[73] Quest schools will use research about brain-based learning to ensure that educational activities are enriched with the latest findings in this area.

We will record, store and catalog workshops, by standard, for use across the network. When specific workshops are scheduled, we will institute a standard practice of recording these workshops for all students to access; as needed. Once recorded, the workshops will then be assessable, via an intranet, when students are seeking instructional resources to assist with their mastery of specific Common Core standards.

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[72] (Lemov, 2010)
[73] (Fitzgerald, 2006)

Students will also have the opportunity to request a specific workshop, which might not be part of the Common Core Standards, via Edmodo. This will give 'voice' to students and provide them with further direction of their own learning.[74]

Student Boot Camp

The boot camp is an intensive orientation at the start of each school year and will be required of all new students. The camp is designed to:

- Provide students with explicit information about how we intend to operate Quest schools,
- Set cultural & academic expectations, and
- Help students understand how learning will occur.

We will ensure that each student knows that Quest is different than most schools and that they will be challenged to work harder than they may have in the past. We will also let students know we believe that all students have the capacity to learn, when the work is aligned to their interests.

Quest will orient students to current brain research (neuroscience, learning styles, and learning preferences). We believe there is room in this model for students to understand as much as possible about how their own brain works when learning occurs.

We will then help students explore how to manage and maximize their learning while considering their own learning styles and preferences so that students can begin visualizing their own mental learning model when functioning as part of groups and individually.

Students will be oriented to the processes we will use for project-based learning and have the opportunity to produce their first project as a team. The entire project life-cycle will be used as a teaching opportunity for students to understand how projects will become part of their learning at Quest.

As part of the Boot Camp, we will also ensure that students know how to use the technology employed at Quest, including the instructional platforms, the social media platform and the project documentation platform. This will be an opportunity to reinforce the importance of becoming a self-directed learner.

Assessments will be administered to help Quest build a base-line profile for each incoming student. The information will help Quest determine the type and the intensity of any interventions needed for new students. These interventions can then be designed and scheduled, prior to the first day of school.

Students will be assigned to student advisories, which will be an important part of the Quest culture. As part of advisories, it is important for students to understand how to give and receive feedback with each other. We will use a model for peer discussions and rubrics for assessment. Students will have an

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[74] (Spady, 1996)

opportunity to practice peer assessment and feedback processes in a low-risk environment, prior to the start of school.

Students will be responsible for authoring their own learning plan, based on work by Littky and Washor.[75] Quest will develop a standard format for these student developed plans. The learning plan will include a discussion about their current achievement and their desired achievement trajectory. Under close adult support, students will then produce their first learning plan to be reviewed and completed with their parents or guardians. This activity will prepare them for their first Career Planning Check-in.

Capstone Projects

These projects are meant to tie together and to reinforce instructional standards. The projects will be used as a way to integrate seemingly isolated silos of facts into usable knowledge. These projects will be developed to encourage students to apply knowledge, which falls under separate standards, to real world problems. These projects should be challenging for students and allow them to demonstrate mastery of higher order thinking skills.

Projects should be focused on community needs, local, state or global in nature and scope. Projects will be designed by students, with staff guidance and coaching. Students will be taught how to ensure that their project designs for the year cover the appropriate academic standards for each grade level.

Projects will also be used as a vehicle to teach systems thinking. Students should be challenged to only understand systems thinking and to also demonstrate a level of mastery over systems thinking.

Project presentations will become an effective vehicle for students to display their mastery of the academic standard as well non-academic performance criteria. We will build on the work of EdVisions and others in using project demonstrations to display learned competencies.

We will also use team projects to help students develop and build collaborative skills that will become an asset to them in their pursuits beyond Quest. Part of the rubric for evaluating projects will be the innovation students demonstrate, when faced with obstacles to executing their project design, implementation, and even evaluation.

Career Planning Cycles

Toward the end of each planning cycle, students will have the opportunity to review their work and to compare their work products to their learning plan aims and goals. This will help them gain alignment between their student-developed aims and goals and their current progress and trajectory. If adjustments are needed, students will document those changes and this will become part of their amended learning plan.

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[75] (Levine E. , 2002)

Students will use asset mapping techniques to help them identify who their supports are at home, in school, and in their community. If they determine that they don't have the assets in these places to help them execute their learning plan, they will be encouraged and assisted in locating additional assets.

The Career Planning Cycle is meant to assist students in conceptualizing and then executing a mental model of success. Quest will introduce students to a number of change frameworks as they progress and develop that are appropriate for their developmental state. These frameworks will assist students in viewing success as part of their fabric, as opposed to something separate from them. [76]

Executing and reviewing their learning plan will encourage students to view systems thinking on a more personal level. They will be able to see relevancy in how mental models help them to solve personal problems and challenges. Quest will consider using the materials and processes developed by WorkKeys as part this process. These tools have proven to be effective for similar applications.[77]

Quest Attributes

Through the means stated above, Quest intends to build on the work of Carpe Diem and EdVisions to create schools that have the attributes detailed in Table 6. These attributes grow out of our view of the

Quest Attributes in Terms of Rigor, Relevance and Relationships	
Rigor	Subject area performance is maximized and enhanced by integrating projects across subject areas
	Technology is used as the delivery platform for learning and a tool for developing projects
	The learning spaces are relatively defined, but learning can also occur any-time and any-place.
Relevance	Projects support community building while respecting the needs of independent thinking
	Learning is highly self-directed in content and in pacing
	Learning is explicitly relevant and guided by external standards
Relationships	Teachers are coaches
	Relationships are highly valued

Table 6. Quest Educational Attributes.

best that these two, excellent schools offer and is presented through the lens of rigor, relevance, and relationships.

Assessment of Student Achievement

On-going academic assessment of all types will be implemented in Quest schools. Daily, weekly and end of unit assessments will be part of the overall data system. A technology platform must be integrated into the overall Quest assessment cycle. Progress Monitoring has proven to be a successful strategy for tier 2 and 3 interventions.[78] Quest will use parts of this strategy to structure its interventions.

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[76] (Comer, 2009)
[77] (Dicksteen, 2011)
[78] (Student Progress Monitoring: The National Center on Progress Monitoring, 2011)

Data driven instruction is an important aspect of the overall instructional program. It provides feedback about the instructional program; by assessing the efficacy of the instructional platforms in helping students meet their learning targets. By using periodic assessments that are tied to standards and ensuring that the workshop curriculum aligns with those assessments, the instructional program for each student is continually assessed and adjusted.

Data will be extracted from the e- platform on a weekly basis and students who need extra supports will be scheduled into targeted sessions to help them master the corresponding failed standards. Students, who have mastered a higher percentage of the attempted standards, will be scheduled into extension workshops or to stretch specific project goals that correspond to standards mastered on the instructional platforms.

It is anticipated that the average Quest student will progress through the curriculum with minimal academic obstacles. However, students who are above or below a yet to be determined cutoff, will be assigned to remediation or extension activities. Students who enter the school significantly below grade-level will be assigned to additional interventions, primarily through increasing the amount of math or reading assigned to them.
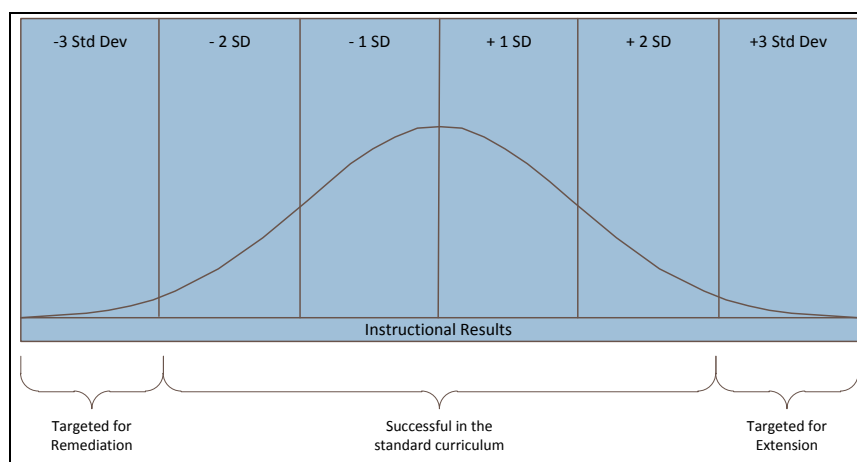
Figure 5. Illustrative Quest Instructional Spread.

The standard deviation markers in Figure 5 are illustrative of outcomes from students' interacting with the instructional platforms and individual instructional standards. Capacity issues and priority around remediation and extension workshops will determine the actual cutoffs for each intervention. It is expected that Quest will likely experience student distributions similar to that of other practitioners of Response to Intervention strategies.[79]

[79] (APQC, 2009)

Evaluating Programs

Programs will all be evaluated against the most important metric, student achievement. The use of data throughout Quest will enable all evaluations to be data driven. Wherever possible, Quest will use live data to assist with the evaluation and improvement of programs and processes. Where needed, we will collect additional data to use as part of the evaluation process.

The Data and Curriculum Team Program will also have a primary role and responsibility in program evaluation. This team's membership and structure is discussed later in this document. By design, on-going evaluation will be part of the Quest culture. Teams will review all aspects of Quest operations, including non-academic programs to ensure that they are adding to the mission and not subtracting from overall operational effectiveness. Phase 1 tasks related to Development and Delivery of Curriculum and Instruction are listed below.

Task ID	Curricular Development and Delivery Tasks	Person Responsible	Months Before School #1 Opens
19	Develop Contract with EdVisions for PD & Coaching	Executive Director (ED)	14
24	Develop Boot Camp & Identify Presenters	1st School Director	12
31	Design Career Planning Cycle	ED & Co-Developer (1st School Dir.)	11
35	Benchmark Carpe Diem and EdVisions	1st School Director	10
39	Determine Which Student Asset Approach to Use	1st School Director	9
41	Develop Education Focus for School #1	1st School Director	9
42	Develop Format for Student Planning	1st School Director	8
44	Develop Discipline Policy	1st School Director	8
45	Develop or Decide on Advisory Metrics	1st School Director	7
47	Develop Student Led Conferencing Format	1st School Director	6
56	Review Intervention Strategy (RiT)	ED & Co-Developer (1st School Dir.)	5
60	Design Student Workshop Structure	1st School Director	5
61	Develop 1st Year Extracurricular Activities for School #1	ED & Co-Developer (1st School Dir.)	4
66	Develop Workshop Recording, Storing & Posting Process	ED & IT Consultant	4
67	Develop Phy Ed Programming	1st School Director	3
68	Hold Boot Camp for School #1	1st School Director	3
72	Hold Summer School for School #1	1st School Director	2
76	Present EdVisions PD to Faculty	1st School Director	1
77	Present Project Foundry PD to Faculty	1st School Director	1
78	Present PD for instructional platforms to Faculty	1st School Director	1

3.0   Design and Delivery of Student Support Services

Student support services such as counseling and other aspects of the socio-emotional and socio educational supports for students are described below. This area includes special education, Title I

services, student counseling, college coaching, sports, student groups and referral processes to community agencies. Quest will consider using methods identified by James Comer in developing its approach to supporting student needs.[80]

Requirements for Support Services

Student support services are required to provide needed socio-educational supports for students with needs above what can be provide by classroom teachers. Support services are also desirable for students whose needs can be met by teachers, but whose performance in the classroom can be enhanced with additional coaching and guidance.

Interventions are most effective when they are designed before they are needed. Therefore, Quest will design interventions for our students that will support student success, prior to enrolling our first students. These interventions will be discussed with prospective students and their families during the orientation and enrollment process.

Quest will ensure that students and their parents know how and when the interventions will be used and what will be required for students to exit from these interventions. Intervention designs and the aggregate results of these interventions will be shared with all stakeholders for the purpose of continuous improvement.

Evaluation of Support Services

Evaluating services requires that staff members be trained to be effective process observers[81]. All services will be evaluated to ensure that they are positively impacting the educational experiences of Quest's students. Evaluations will include observation, the use of surveys, existing data, and other instruments to determine how each service aids with and aligns to academic achievement goals.

Coordination of Community Support Services Related to Student Needs

Where the needed student support is beyond what the school can provide, or where extraordinary providers exist, those providers will be identified to provide support services to the school. These providers may eventually become partners. However, they must share a similar mission to be effective providers for the school.[82]

Partners with quality services and the capacity to deliver will be connected with those students needing support services the most. Quest will seek to establish relationships with community organizations wherever our schools are located. This direct student service model will require on-going evaluation, oversight and support.[83]

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[80] (Comer, 2009)
[81] (Valois, 2011)
[82] (Valois, 2011)
[83] (Valois, 2011)

Design and Implementation of Parent Engagement Programs

Parent engagement is a vital function for schools. Typically, parent involvement and engagement are most active in elementary schools, when parents are requested to attend plays, musicals, and other events. Parental responses to school requests for engagement seem to change at the middle and high school levels.

Quest will seek to understand the parental needs regarding how and when they are contacted and seek to find positive avenues to build effective relationships with parents that aid their students in reaching their full potential. All staff will receive training and coaching to support this activity. The focus will be one of building on student strengths, gifts, talents and abilities – and then enlisting parents in that student asset building process.

Quest will involve parents in our schools by using a career focused lens. We will involve students by ensuring that conferences are student led events that allow students to take ownership of their performance, present their performance, and to grow in their presentation skills.

The Explore, Plan and ACT tests are effective predictors of college and career readiness and can become a reference point for effective discussions about student progress and student instructional needs. Quest will use these predictive assessments to enlist the assistance, guidance and support of parents, in helping student's reach their aspirations.

Design and Implementation of Counseling Services

Student counseling will revolve around the use of the Advisory.[84] Advisory provides a platform for helping students to acquire problem solving skills and to apply those skills to remove barriers to academic success. Part of this process will involve the adoption of a set of metrics that will assist with monitoring the effectiveness of each advisory group. Those metrics will include, but are not limited to, attendance, student performance, behavioral referrals, and detentions.

Quest will identify a counseling professional for each school who can support the school's culture and provide professional development to the entire staff on how to address the socio-emotional needs of students. This counseling professional will also work with students and their families on transition plans for students leaving Quest for college or even leaving for another school.

Additional counseling resources may be contracted for through 3rd party agencies in times of crisis or where and when it might be advantageous to assess and make immediate changes to the student culture at a given school.

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[84] (Anfara, 2006)

Design and Implementation of Social Services

Social services provide links between the school, the family and community resources. Often this linkage is invoked during the most stressful situations, i.e. abuse, abandonment, etc. Quest will seek to provide these services proactively.

A case management process will be developed that protects students, but allows Quest to learn from student referrals and thereby increase its efficacy in the processes related to social service delivery. This approach should help Quest to support students more holistically.

Design and Alignment of Extra-Curricular Services

Extra-curricular activities are part of a quality school experience. Quest will assist its schools with the design and delivery of quality extra-curricular activities. Possible partners in this area include the Boys and Girls Club™ and Junior Achievement™. Quest will also develop agreements with district middle and high schools that allow Quest students to participate in competitive sports activities.

At the high school level, Quest will provide service opportunities and internships for students. Some service opportunities might be available for high school students to assist middle school students through peer mentoring and study assistance. Phase 1 tasks related to the Design of Student Support Services are listed here.

Task ID	Support Services Tasks	Person Responsible	Months Before School #1 Opens
25	Develop PD on Relationship Building	ED & Co-Developer (1st School Dir.)	12
36	Develop Relationship with Intermediary for Internships	1st School Director	10
40	Set up District and School #1 in Edmodo	ED & Co-Developer (1st School Dir.)	9
43	Develop Parent Engagement Program	1st School Director	8
57	Hold Lottery for School #1	1st School Director	5
58	Develop Case Management Approach	ED & Co-Developer (1st School Dir.)	5
75	Begin Faculty In-Services	1st School Director	1

4.0   The Design and Management of Operations

Core administrative processes for the Quest network are discussed in this section. In many schools these processes are coordinated by business managers or secretaries. In the Quest model, these duties will be shared between designated staff members at each school and the CoS. To fully enjoy the anticipated economy of scales, the planning, acquisition, and evaluation of these services will be collaboratively led by the Center of Support.

The Quest CoS will work with school leadership to maintain a central compliance calendar that will help to ensure that adequate resources are in place for state-mandated reports and other compliance needs

that might be overlooked. This central calendar will provide a cycle of management to help drive the support, assistance, and oversight activities of the CoS staff. The processes are detailed below.

Resource Planning and Acquisition
Planning resource needs will require the development of base-line forecasts and developing an understanding of the resources needed. These resources might be community resources as well as instructional resources that will require adequate time and a high degree of collaboration to set up and establish.

The network's economy of scale should assist schools in acquiring the material resources that are needed at each school. To ensure that these resources are ready when needed, a high level of logistical collaboration and planning is needed.

Procurement of Materials and Services
The Quest CoS will function as the purchasing agent for Quest schools. The CoS will maintain vendor relationships and an adequate line of credit to ensure the smooth flow of educational materials and services to our schools. This support will include assistance with inventory control and conducting periodic physical inventory audits.

We have already begun establishing relationships with several vendors and shared our global goals and the timelines we are working under. We have also developed frameworks for assessing the organizational fit between some of these vendors and our overall strategy.

Transportation Services
Quest does not anticipate providing transportation services for students to reach our schools and to return to their homes. From time to time, field trips and excursions must be planned and executed. When subject area teachers have to be concerned about this level of planning, time is diverted from instruction. The CoS will work with school based staff to ensure that this activity is well planned and well executed, freeing subject teachers to focus on the most important activity – student achievement.

Food Management
Managing food services is not part of the core competency of most School Directors. It is however school site based and must take into account the particulars of each location. Quest will seek to partner with local food providers to ensure that all of our schools have a quality food service program. The CoS will take the lead in ensuring that students have high quality and affordable food service providers and student lunch accounting processes.

Logistics and Warehouse Management
The material needs of schools vary during the year, typically reaching the peak pull sometime during the summer months. During peak demand times some warehousing may be needed. The CoS will maintain a vendor relationship with a warehouse or will acquire needed warehouse space to use for these periods of peak demand.

Some common materials may be less expensive to order in large quantities and then have vendors store these materials. Copy paper can be an example of this kind of material. It can frequently be less expensive to purchase a half year's supply of copy paper and have the vendor store and deliver on demand, than to purchase every two or three weeks. The CoS will maintain a commodity list that will be reviewed for costs and frequency. This will help ensure that Quest schools are getting the best bang for their buck on these types of purchases.

Library Services

Libraries are changing from the statically located rooms of the past, to the dynamic, highly assessable data storehouses, hosted on intranets and the internet. Quest will ensure that all of our schools have access to best-in-class library services through resources hosted on our computer network and through the Internet assessable resources. Phase 1 tasks related to the Design and Management of Operations are listed here.

Task ID	Operations Development Tasks	Person Responsible	Months Before School #1 Opens
14	Purchase School Spring Recruitment Service	Executive Director (ED)	15
48	Develop Contract with Food Service Provider	ED & Co-Developer (1st School Dir.)	6
55	Purchase Project Foundry	ED & Co-Developer (1st School Dir.)	6
63	Purchase Student Furniture	ED & Co-Developer (1st School Dir.)	4
64	Purchase Administration Furniture	ED & Co-Developer (1st School Dir.)	4
69	Purchase instructional platform subscriptions	Executive Director (ED)	3

Quest Center of Support Processes

The systems and processes detailed in this section are also frequently referred to as "back office functions". These processes are essential to the effective operation of any school and are even more essential to Quest, as a network of schools.

The overall Quest operations strategy requires effective and efficient operations in this area, allowing teaching leaders at each school to focus on the business of education. In most schools, the operations shown in the Business Model (Figure 2) under CoS processes, are business functions that few School Directors are well equipped to carry out, much less organize them into an effective part of the school enterprise.

Quest will incorporate well defined, well documented processes that add value to the work of school-based stakeholders.   This includes continually monitoring CoS costs as a comparative function to school costs and overall network costs. Our goal is to help ensure resources, needed for education, are spent

closest to the students. In other words, we will ensure that resources available to Quest are used where they will make the greatest impact.[85]

The organizational structure that supports these functions will start out very lean and grow as schools are added to the network. A metric will be developed to keep the focus on cost savings and maintaining a lean CoS. In the text that follows, there is a discussion of each of these areas and some of the major process areas that comprise each business element (Stakeholder Relations, Human Capital, etc.).

Structuring the functional activities parallel to the structure of the APCQ framework allows on-going benchmarking of best-in-class educational organizations.[86] Quest recognizes that networks that replicate and then develop their 'back office' systems have struggled with the demands of rapid growth.[87] Quest seeks to avoid many of these pitfalls by ensuring that best-in-class processes are developed and continuous improvement across the network is a priority from start-up and throughout execution of our growth plan.

5.0 - Development and Management of Stakeholder Relations

All schools have stakeholders. These include: students, teachers, parents, employees, funders, vendor partners, business sponsors, or other interested parties. Developments in these process areas ensure that Quest addresses communications with an overall strategy that includes the following key processes:

Stakeholder Relationship Strategy Development

Quest will immediately retain a consultant (interim Development Manager) to assist with designing a set of strategies that will build and sustain positive relationships with all stakeholders. This strategy will include stakeholder analysis, what their needs are, the messaging that is needed to support each stakeholder and building an infrastructure that supports all Quest stakeholder development needs.

Development of these strategies will involve interviews and focus groups with identified stakeholders and identification of the appropriate communication channels to use as part of the strategy. The strategies will include internal stakeholder (staff) and external stakeholders and consideration of the unique, as well as the common needs that both stakeholder groups have.

Stakeholder Relationship Strategy Management

The Quest educational program will require support from the community. The educational program will use project-based learning and these projects must be externally referenced for them to have relevancy and meaning for students. This will require working with community members, non-profit groups, and for profit businesses to establish interning and service learning opportunities and to help guide students development.

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[85] (McDonald, 2011)
[86] (APQC, 2011)
[87] (National Charter School Research Project, 2007)

The Quest CoS will establish relationship goals for each stakeholder segment and use this data to build solid enrollment estimates, in collaboration with School Directors and school staff. The CoS will use the processes and approach outlined by Jerry Acuff in the Relationship Edge.[88] Best practices in this area will be shared with each school staff and their stakeholders to ensure that school personnel are equipped with the relationship development skills. The work in this area will become more focused, once a location is identified for the 1st school.

Execution of this strategy will be the ultimate responsibility of the Executive Director, who has extensive experience in area. The strategy will be executed with the assistance of the above-mentioned consultant. As Quest grows the CoS, this responsibility will be transitioned to a Director of Development. As in all strategies, success with managing relationships requires diligent, relentless execution and on-going evaluation.

Communications and Publications Strategies Development

Communications are a key part of gaining and maintaining organizational alignment between the stated mission and vision and the activities that support the mission and vision. Through effective identification of stakeholder needs, an effective communications strategy will be developed and executed. This strategy will included the following media: print, website, social media, e-mail platforms, and other outlets that enable the effective execution of the overall strategy. We will develop objectives and metrics for each stakeholder segment strategy that will capitalize on their unique segment characteristics.

Communications and Public Information Strategy Management

From effective strategy development will come an agreed upon plan that includes roles and expectations regarding what needs to be communicated, how often, to whom and how it will be communicated. The effectiveness, both from a dissemination and cost effectiveness viewpoint, will be evaluated and continuously improved.

Through on-going evaluation, the most effective channels of communication will become the focus of advertising investment and those less effective means will be avoided or eliminated. This strategic approach to communications will help Quest schools to more efficiently leverage available resources.

Stakeholder Relationships and Transactions

Effective communications are part of effective customer service. Quest will use elements of best-in-class customer service models to ensure that all stakeholders receive the best treatment during every transaction.[89] These transactions might be as wide-ranging as requests for enrollment applications to the school to donor requests to donate to the school.

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[88] (Acuff, 2007)
[89] (Anderson, 1998)

All stakeholder requests must be tracked and responded to in a professional and timely manner. Each transaction should leave stakeholders feeling confident that Quest, as an institution, is one that they are proud to be associated with. Stakeholder satisfaction will be assessed on a periodic basis, as well as randomly, to ensure that our processes that support stakeholder relations are consistently well executed.

Budget for Stakeholder Relations

Developing and managing a budget for all the activities listed above is crucial to the effective administration of these activities. Often, communications is an area that suffers reductions in funding when resources become scarce. Quest leadership must work to ensure that Stakeholder Relations is an actively supported function. The Phase 1 tasks related to the Development and Management of Stakeholder services are listed here.

Task ID	Stakeholder Development Tasks	Person Responsible	Months Before School #1 Opens
9	Develop Website Announcing Quest	Executive Director (ED)	15
20	Hold Community Meetings & Get Input on School Design	Executive Director (ED)	13
32	Recruit 1st Class (6th and 7th Graders)	ED & Co-Developer (1st School Dir.)	11
49	Develop Customer Service Protocols	ED & Co-Developer (1st School Dir.)	6

6.0 Human Capital Management

The School Directors, teachers and other adults in Quest schools will ultimately determine the efficacy of the educational program. Recent studies have made clear again that the most important factor in a child's education is their teacher.[90] This same study makes clear that there is greater efficacy from teachers who are in the upper third of their graduating class. It further identifies hiring practices that are successful in recruiting and retaining these top teachers.

As part of the overall Human Capital strategy, Quest will recruit and hire School Directors, well in advance of the opening date for each school. Part of their work will be to complete the details around school design, as outlined earlier in the New Schools Protocol. Other parts of their work will involve supporting specific projects that will assist in their global development and help them understand all the aspects of the CoS services.

Human Capital Planning, Policy and Strategies Development and Management

The Quest human capital strategy will be an integral part of the overall Quest strategy. Accomplishing the Human Capital goals will require extensive planning and developing manageable policies and procedures for schools and the CoS.

[90] (The New Teacher Project, 2010)

Planning for school staffing should be part of an annual appraisal process. The process should begin just after the start of the calendar year and position each school to identify candidates to offer positions to by March.[91] This allows all parties to anticipate organizational and individual needs.

Recruitment, Sourcing, and Selection of Employees

These vital processes need to be streamlined and scalable as the network grows from one school to a three schools. The talent pipeline will need developing and monitoring. Quest will require a highly selective hiring process to ensure that the right employees are brought into the organization. As Jim Collins might say it is important to get the right people on the bus and then get them into the right seats.[92]

To aid in this effort, Quest will immediately select and hire a consultant to assist with formalizing our approach to talent acquisition and hiring. We have already met with one consultant to review our needs. This consultant has extensive experience in providing high quality talent to charter schools.

The selected consultant will also be asked to recommend a web-based sourcing platform, similar to SchoolSpring[93], Kronos[94] or Taleo[95] to leverage our future efforts. These web-based platforms allow transparent workflow management of the hiring process – allowing school-based employees and CoS staff to stay informed about the status of their open positions and how each candidate of interest is progressing through the hiring process.

Development and Coaching Employees

The operational vision, mission, and values of every organization guide the organizations behaviors. The stated or espoused values can often be different than the observed values. Education and training can prepare employees for the roles they will play in an organization. When the realities of the organization are encountered, employees may need some level of coaching to reach their next level of performance. Here is where performance coaching can help, by reducing the variation between what is needed and what is being provided by each employee.

Quest will pay close attention to any gaps between the espoused and lived values exhibited by employees and its consultants. For the first few years of the organization's life, this will be the responsibility of the Executive Director, who will establish an office at each school during its first year of operation.

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[91] (The New Teacher Project, 2010)
[92] (Collins, 2001)
[93] (Finding teaching jobs, school jobs, and education jobs SchoolSpring, 2011)
[94] (Kronos, 2011)
[95] (Taleo)

Performance Level	Descriptors
1	This teacher meets the needs of no students or very few students
2	This teacher meets the needs of half of the students. It is common for some parents and students to complain about this teacher.
3	This teacher meets the needs of all or almost all of the students on a consistent basis. This includes the high-achieving students, as well as the struggling students.
4	This teacher not only meets the needs of all or almost all students, but is a mentor to other teachers on the staff. His/her strengths spread beyond the individual classroom.

Table 7. Teacher Evaluation Rubric. [96]

At the school level, each School Director will be responsible for this activity. For this level, Quest will develop a rubric for performance evaluation similar to the one in Table 7.

Employee Recognition and Retention

Hiring new employees is an expensive, but necessary activity. There are hidden costs involved in recruitment, selection, hiring and on-boarding each employee. The costs of hiring a professional employee can exceed 50% to 200% of an employee's annual salary.[97] It is therefore advantageous to ensure that the organization is properly training, supporting, rewarding and retaining employees.

Rewarding and retaining employees should reinforce the on-boarding and coaching they received upon their hiring. The compensation and career development of each employee enable them to then reach their full potential and to serve the organization and ultimately the students who are enrolled by Quest. We will structure an effective on-boarding process that will help to propel each employee into their new role. The on-boarding process will involve the immediate manager and all pertinent Center of Support personnel who support each employee.

Pay for performance – At this time, no specific pay for performance system is being proposed. However, as financial self-sufficiency is approached or operational efficiencies reached each position's contribution to Quest's outcomes will be evaluated. A pay for performance system will be developed after the 1st school is opened.

Employees Redeployments and Retirements

Planning for the long-term health of Quest means that retirement and succession planning needs to begin shortly after the organization becomes operational.[98] All Quest employees should understand the career pathways open to them. Charter schools have typically promoted from within as a primary

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[96] (Lee Jenkins, 2007)
[97] (William G. Bliss)
[98] (Campbell, 2010)

method of developing their talent pipeline.[99] Quest also sees this as the most viable talent pool for our planned growth.

When employees are promoted to new positions, this creates openings which must be filled. Quest anticipates that many future employees will have the capacity to assume leadership positions in the organization as it expands. Quest will balance hiring for current positions with hiring for growth, by hiring with the future in mind.

Employee Information Management

Managing employee information is a key to managing an organization's talent pool. This information includes current employees' data, including their skills talents and abilities; as well as their aspirations and the areas of their performance needing attention.

The CoS will develop, monitor and improve procedures to support these processes. The current Quest budget includes funding for an HR Consultant. One of the consultant's duties will be to help Quest verify the need for a Human Resource Information (HRI) system. A decentralized HRI system would allow managers to access current employee information regarding, certification status, background checks, and other data pertaining to employment status.

Under ideal circumstances, this system would receive data from the recruitment system and allow for a labor savings and cost avoidance. Single entries in one system would not be duplicated in the other. There are vendors with unified systems that will become part of our research and selection process. The overall functionality of any system selected will be balanced against the initial cost and resources required to maintain the system. The Phase 1 tasks related to the Human Capital Management are listed here.

Task ID	Human Capital Tasks	Person Responsible	Months Before School #1 Opens
1	Develop Personnel Manual	Executive Director (ED)	22
2	Develop Job Descriptions	Executive Director (ED)	22
10	Sign Contract with Recruiting Agency	Executive Director (ED)	15
15	Recruit School Director for School #1	Executive Director (ED)	14
16	Hire HR Consultant	Executive Director (ED)	14
26	Recruit Staff for School #1	1st School Director	12
27	Sign Contract with Principal	Executive Director (ED)	12
50	Establish Account at Dept of Justice - Background Checks	ED & Co-Developer (1st School Dir.)	6
54	Develop On-Boarding Checklist & Protocol	ED & Co-Developer (1st School Dir.)	6

[99] (Google)

7.0 - Information Technology Management

This area supports the technological functions of the Quest administrative team at the CoS, the administrative team at each school, the teachers and most importantly, the students. Provisions must be included for a 3 year technology plan that is revisited each year. Also, disaster and recovery plans must be developed that will allow the administrative and teaching functions to survive any number of unplanned or catastrophic events, e.g. floods, tornados, theft or vandalism.

As Quest goes through the process of starting up its first school, IT services will be contracted through a local vendor to ensure maximum uptime and service level delivery. A Director of Information Technology is budgeted in Phase 2. Major processes in this area include:

Information Technology Management

The nature of information technology (finite operating principles, specific interface requirements and complex cost considerations) requires that IT assets be closely managed, both from cost and utilization perspectives. Internal user agreements must be developed and maintained in collaboration with Human Capital leadership.

The complexity and resulting expense of each staff computer are best determined and maintained as organizational standards. Because of the sheer number and expense of each student computer, the exact requirements – no more, no less – need to be articulated and reviewed to ensure that the current and projected needs are met.

Use of Google Chrome Laptops will allow Quest to avoid many of the ongoing and costly byproducts associated with students using computers. The operating system and software are more or less hardwired and therefore remain largely unaffected by viruses and malware or unintentional changes in the configuration of the computers by the students.[100]

A standardized approach in this area means that a standard student computer configuration and a staff computer configuration will be the norm. A standardized approach also ensures that we have specific procurement specifications, which enables the total cost of ownership to be minimized.[101] Any deviation outside of the standard computers configuration (graphic design, video editing, software design, etc.) will require a sign off from the ED or the Director of Information Technology.

Development and Management of Internal IT Customer Relationships

An internal IT function, if provided via external consultants or internal employees, must provide a valued service to the organization. The service promise should encourage organizational members to work through the IT function for solutions, versus working around IT to accomplish individual goals. When correctly implemented, there is a balance arrived at between standardization and the constraints therein and optimization of the users' experience.

[100] (Various Authors, 2011)
[101] (Madden, 2011)

To assist with the service promise, Quest will implement help desk functionality through a 3rd party provider – Web Helpdesk.[102] Help desk tickets will be issued for all staff initiated requests. IT services are valued most when they are responsive to user needs. Web Helpdesk provides users with updates as to the status of their issue and maintains data regarding IT responsiveness and to each type of issue being resolved.

This functionality will help Quest control costs by providing metrics on meantime between failures, meantime of repairs, repair cost, and other systemic IT issues. These metrics, when properly analyzed and assessed, become drivers for future cost reductions, Improved budgeting, and updating computer standards.[103]

Business Resiliency and Risk Management

Every organization should provide methods of preserving and protecting the data it produces and uses. The popularity of web-based applications is due in part to the goal of organizational resiliency. In other words, what happens to my data if there is a catastrophe (theft, floods, and hurricanes) and my facility is damaged or compromised? Therefore, it is important to find and implement solutions that allow for the continuance of operations, even after catastrophes.

Managing this area of IT involves understanding the cost/benefits of various solutions and maximizing the benefits, while ensuring that the user community has the best user experience for the associated cost. This requires assessing the risks and developing responses to those risks that have appropriate levels of remediation for the associated costs.

As Quest grows, data storage requirements will become clearer. Storage needs for permanent, long-term and near-term storage must be determined. Upon understanding the dynamics around storage, goals and procedures must be developed and reassessed that can minimize the time and effort required to return to 'business as usual'.

Enterprise Information Management

Human Capital produces intellectual capital – that is the information that is used to guide the organizational as well as the data that is used to ensure that stakeholder needs are met. One of ITs roles is to ensure that staff time and labor are used effectively in maintaining this information stored on individual computers, servers or in an IT cloud environment. IT leadership must work with the other functional areas to ensure that information, vital to the organization, can be stored and retrieved with minimal effort, while using appropriate levels of security.

Information produced by various business functions can become trapped in functional silos, unless data sharing is encouraged and facilitated. Managing enterprise-wide information is easily accomplished

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[102] (Web Helpdesk)
[103] (Hartmann, 1992)

through a networked resource, such as a shared drive. Quest will implement a shared drive at the CoS and continue to research the best method of unifying common information for our schools.

There are functional areas where it is crucial to set storage requirements. Some of the areas are: Employee data storage requirements – will there be limits to how much storage each employee has or should have; both in application files and in e-mail limits? How will statutory requirements around storage of student data be addressed?

IT Solutions – Development and Management

Developing, documenting and sharing various IT solutions will assists with collaboration between stakeholders and effective use of the supplied IT tools. Quest will maintain an IT webpage on an intranet that will allow staff and students to view self-help files and videos that will help reduce the costs of IT services.

To meet the IT design goals (low cost and high reliability), Quest will use a number of cloud-based IT solutions. These solutions will be maintained by 3rd party providers, but allow Quest to provide a level of customization that will leverage its Human Capital. Google for Schools is the cloud platform of choice for sharing.

Cloud-Based Application	Options Under Evaluation	Purpose
Document sharing	Google for Schools	Access to common documents
Calendaring	Google for Schools	Access to common calendars, by group.
Instructional Platforms	e-2020, K-12 Aventa, Open Source, Compass Odyssey, Achieve 3000	Provide the primary and secondary instructional platforms
Social Media	Edmodo and Project Foundry	Provide linkage between teachers, students and parents
Learning Management System	Moodle or Brain Honey	To store and track instructional resources

Table 8. Cloud-Based Applications.

Google Apps for Schools is currently free and allows the use of the best in class IT tools, i.e. Microsoft Outlook, iPhones, Black Berrys, etc.[104] Therefore, all standard domain management and security requirements can be developed using this environment.

Quest owns the domains names: www.milwaukeequest.com and www.milwaukeequest.org. These Domains are reserved to become part of our overall IT and Stakeholder Development Strategies.

Mission critical data will be stored locally, on redundant servers. This is the type of data that if lost, could render Quest inoperable or require significant use of resources to recover. It is therefore a wise

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[104] (Google)

investment of time and resources to ensure that IT solutions are in place to mitigate these risks. Examples of this type of data are: Financial data, human resource data, and analyses of year-over-year data.

IT Solution Deployment

As Quest is developed, IT solutions must be developed, implemented and evaluated. Moving IT solutions into stakeholders' hands so their needs are met is the process of deployment. Each stakeholder has different needs. For Board members it might mean access to organizational data that is sufficiently abstracted that it makes sense to them. For students, IT deployment involves designating how students gain access to the technological tools that have been provided for them.

Just as an analysis of stakeholder communication needs will reveal the best methods and systems to use for communicating to stakeholders, this type of stakeholder analysis will reveal the best interface and tools for: students, teachers, administrators, and other staff members. A mock-up of a student screen appears in Figure 6.

Figure 6. Mock-up Student Screen.

Quest will develop policy and procedure to ensure that all vital data is covered by a policy on how and where it is to be backed up or archived. The policy will cover remote data as well as local and server data.

IT Services Delivery and Support

IT Support services will be administered through Web Helpdesk. Metrics for uptime and data traffic will allow for ongoing optimization of IT services. When these metrics receive attention, proactive measures can be instituted to mitigate service impacts from adverse network conditions or other technology issues.

Quest will develop a service level promise for its schools that strikes the balance between cost and responsiveness. This strategy will require hiring an IT consult of at start up and a Director of IT in the 2nd year of operation. As the IT work in Quest schools increases, this position will become integral to effectively planning and implementing IT services.

Supporting IT services will also require developing asset tracking and management services to ensure that the cost of ownership remains a low, controllable cost. Most asset tracking will be done electronically, via bar codes, or network discovery protocols, to keep operating costs as low as possible.

Managing IT Knowledge

Ongoing analysis of Web Helpdesk tickets and resolution patterns will point to areas where help files and videos can be developed and posted. New user training at the student and staff level will be informed by careful analysis of this information, avoiding unnecessary future expenditures and holding overall costs in check, while providing quality service to stakeholders.

Changes to the network environment will be tested and assessed, prior to implementation. Overall costs of maintaining the IT function will be assessed each year to ensure that the strategy of out sourcing remains cost effective. However, by managing the data from Web Helpdesk, Quest will be able to inform any decisions regarding the future direction of the Quest IT function.

Quest will develop and maintain a 3 year technology plan. The plan will be collaboratively developed with the assistance of school leaders. This plan will help to inform network budgeting and planning by proactively ensuring that costs and design factors receive consideration, prior to budget completion. It also ensures that elements of the three year plan are articulated properly in overall budgets and in the long range planning for the IT function. The Phase 1 tasks related to IT Management are listed here.

Task ID	Information Technology Tasks	Person Responsible	Months Before School #1 Opens
11	Port Quest Domain to Google Apps	Executive Director (ED)	15
17	Develop IT Manual	Executive Director (ED)	14
28	Develop 3 year IT Plan	Executive Director (ED)	12
37	Port Quest Domain to Edmodo	ED & Co-Developer (1st School Dir.)	10
38	Develop Plan for Business Resiliency	ED & Co-Developer (1st School Dir.)	10
51	Set up Shared File Server	ED & IT Consultant	6
52	Implement PC Backups	ED & IT Consultant	6
59	Purchase Web Help Desk	ED & IT Consultant	5
70	Development Intranet	ED & IT Consultant	3
73	Implement IT Tickets in Web Help Desk	ED & IT Consultant	2

8.0 Financial Management

The financial health of a school, as with any enterprise, requires the expertise of professional and competent financial planning, management and execution. There is probably no other functional area that can adversely affect a school's operation, in so short of a time frame, than the area of Finance. School finances are peculiar, in that categorization of revenue and expense (per pupil, ESEA, grants, etc.) is unlike many organizations. Quest has drafted a Financial Policies and Procedures manual, using the

framework below, to organize the many processes required for our network to function effectively. The process areas here that must be considered include:

Accounting Planning and Management

The effectiveness of planning and management accounting is directly tied to how well a school understands plans, budgets, and develops financial forecasts. Effectiveness in this area is important in that accurate resource planning enables and supports effective operations in all other areas.

Initial budgets, set in the spring of each year for that following fall, are dependent on information from the academic functions of the organization that collaboratively set attendance goals. Quest will involve academic, financial and development functions in this activity. The following time frames are stipulated in the Quest Financial Policy and Procedures Manual.

> **January** – Executive Director and School Directors prepares his/her budget for
> the next fiscal year.
> **February** – First draft submitted to Director of Finance and Executive Director
> (for school budgets)
> **March** – First draft of consolidated budget to Finance Committee
> **April** – Board meeting to approve budget

'Revenue' Accounting

Tracking budgeted educational revenue is primarily accomplished by recognizing two major accounting classifications categorical and non-categorical revenue. Categorical revenue is that revenue that is obtained, with specific restrictions as to its use; i.e. Title I, Title IIA, Special Education, etc.

General Accounting

This area will include establishing approval limits and a matrix of responsibilities for schools and the CoS. Quest will develop a common financial template for budgeting, forecasting and reporting information at the school level as well as a template for reporting the aggregate, including the CoS, to the board of directors. These templates will be applied to our implementation of QuickBooks accounting software.

Quest has taken the important step of establishing a chart of accounts and a general ledger system that supports individual school expenses and those maintained at the CoS level.[105] Methods of allocating expenses have been developed so that shared expenses, like facilities costs, are as transparent as possible at the school level.

Fixed Assets (facilities) Budgets

Quest will research fixed asset budgeting for facilities if needed. Additionally, approval procedures for capital expenses will be developed to support the issuance of bonding instruments, should the need arise.

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[105] (National Consensus Panel on Charter School Operational Quality, 2009)

Payroll Processing

Through close integration with the Human Capital function, payroll will be facilitated through outsourcing to a vendor (organizations under consideration include APD or Nolan). The Human Capital and Financial processes will receive focused attention to ensure that effective payroll processing is implemented by the first operational date of Quest.

Where ever possible, automation will be used to lower costs and to increase accuracy in payroll processing. This automation, however, cannot occur without proper oversight and monitoring. Procedures must be evaluated through audit and testing to ensure that payroll processes are meeting the needs of the organization and its stakeholders.

Accounts Payable and Expense Reimbursements

Effective processing of accounts payable (A/P) is a key function of every school. Quest will monitor A/P activity via QuickBooks to ensure that vendors are paid on time and according to stated terms. Every organization needs to ensure that vendors who agree to provide services are paid according to agree upon terms.

Establishing and maintaining good vendor relations will assist the Quest network in obtaining the economy of scale that makes being part of a network an advantage for schools. There are few things that can sabotage effective vendor relations like late or delayed payments for services already rendered.

Treasury Operations

Carefully controlling the inflow and outflow of cash provides the organization with an important measure of financial health. Retaining too much cash in the wrong type of vehicle can deprive the organization of the benefits of retained revenue. Improper planning and controls around cash outflow can leave the organization without the resources to cover regular expenses.

Ineffective treasury operations can result in vendors waiting excessively long for payments or being paid so rapidly that it puts the organization in the position of needing to access credit facilities too often. This drives up the costs of operations and can damage the credit worthiness of the organization. Quest will ensure that effective treasury operations are implemented via its policy and procedures.

Internal Controls

Internal controls help to limit the risks of improper expenditures occurring. Quest has developed a set of internal controls that includes segregation of duties and signing limits. These controls have received an external independent assessment to ensure they will function well. Quest has also developed and will adopt whistle blower and employee reporting policies. The Phase 1 tasks related to the Financial Management are listed here.

Task ID	Finance Management Tasks	Person Responsible	Months Before School #1 Opens
3	Gain Board Approval on Finance P&P	Executive Director (ED)	20

6	Select Payroll Provider	Executive Director (ED)	17
12	Establish Facilities LLC	Executive Director (ED)	15
18	Hire Finance Manager (Consultant)	Executive Director (ED)	14
23	Purchase & Set Up QuickBooks	ED & IT Consultant	13
53	Develop System for Asset Tracking	ED & IT Consultant	6

9.0 Acquisition, Construction, and Maintenance of Facilities

Quest has performed preliminary facility analysis and is aware of the need to gain enough quality facility space to support the organizational strategy. The processes that will be of concern in this area include:

Property Design and Construction

Quest will establish a separate limited liability corporation (Quest LLC) which will hold and manage its facilities. This organization will be under the direction of Quest board and managed by the CoS. It will provide Quest with the advantage of providing facility services at a fixed cost to each school. The advantage for the schools is that each will pay the same cost, regardless of the building they are in and be freed of having to deal with facilities issues.

For Quest to achieve its overarching strategy, it may need to build new facilities. Building new facilities requires an organizational structure and staff resources to ensure that time-lines and milestones are met. The Quest LLC will have the responsibility of confronting various construction challenges and working through them to develop and implement alternatives.

Modifying existing facilities so that they meet the needs of Quest students and staff is less demanding, but, not by a huge factor. Even minor build outs can expose unknown issues that must be confronted and dealt with. The Quest LLC will have the primary responsibility of supporting this area.

Classrooms and Furnishings Maintenance

Maintaining classroom appearance and the state of the furnishings is important enough that processes need to be developed to ensure that all instructional space is well maintained. Quest will use the Web Helpdesk to provide the same type of data will be tracked for its IT function. The same benefits that IT will receive (cost, frequency of repair and responsiveness) will available to the rest of the maintenance function and to Quest as a whole.

This centralized approach will allow resources to flow to areas of need, during the times of the greatest need for those resources. It will still be the responsibility of each School Director to escalate urgent issues, but the CoS will assist Quest schools in the routine and not so routine maintenance of commons, laboratory, and classroom spaces.

Classroom Furnishings and Disposition

All fixed assets have useable life spans. Monitoring the age of these assets (desks, chairs, white boards, projectors, phones, etc.) and their condition can help to avoid unplanned expense. However, when

fixed assets do have to be replaced, the method of disposal should be documented. This includes, donating equipment and the value at donation as well as considerations of if and when employees can purchase assets that are at the end of their usable life spans.

Physical Risk Management
Physical facilities have physical risks associated with them. These need to be assessed periodically and proactively planned for. Mitigating risks in this area includes setting policy regarding safety and security and role definitions around whose responsibility it is to monitor facilities during and after the school day. Quest will implement weekly walk-throughs of our facilities to heighten awareness of and to speed remediation of possible risks.

Capital Asset Management
Quest will maintain asset identification and tracking processes to know where all assets of a given value are and if they are currently in use or out of use (not functioning). This will be done through serialization and tracking and a yearly physical audit.

Asset age and usable life will also be tracked. This information will be compared to maintenance information, assessable via Web Help desk, to ensure that capital assets are adding to the mission and not costing more than their current value is bringing to the organization. The Phase 1 tasks related to the Facilities are listed here.

Task ID	Facilities Tasks	Person Responsible	Months Before School #1 Opens
13	Develop Contract with IFF to Locate Building	Executive Director (ED)	15
29	Secure Building Location	Executive Director (ED)	12
62	Finalize Facility Plan for School #1	1st School Director	4
71	Implement Facility Tickets in Web Help Desk	ED & Co-Developer (1st School Dir.)	3

10.0 Environmental Health, Safety and Security Management

Quest will need to manage site safety for all stakeholders (students, teachers, parents, staff, and any visitors). To ensure that leadership is proactive in this regard, the following process areas will be implemented:

Determination of Environmental Health, Safety, and Security Risks
Every site, old or new, must be evaluated for health and safety risks. In older buildings, asbestos abatement may need to be completed or at least mapped out, as part of understanding the overall costs of ownership. In newer buildings, outgassing from building materials might require extra ventilation to avoid students and staff from becoming ill.

Older buildings can also be adjacent to brown fields, where in-ground and underground contaminants can create issues if students were to track dirt into the school. Building issues can become exposed

upon taking on a remodeling project, where walls that were covered over now are visible and not to code, and then require remediation, prior to completing the remodeling. In these cases, all exposure risks need to be evaluated and remediation put in place to eliminate or mitigate the risks to all stakeholders.

Development and Execution of Health, Safety, Security, and Environmental Programs
Quest will develop programming to ensure that continuous improvement is a focal point for all health and safety related issues. We will develop and execute periodic audits to ensure that risks are mitigated and that remediation efforts have been successful. The audits will also include reviews of policy and procedures to assess their effectiveness. Audits will range from safety walks by the School Directors to CoS management visiting schools to conduct more formal systems appraisals.

Training and Education of Employees
Employees are the first line of defense for safety and security issues. All employees must aware of the possible hazards that exist. Additional training may be required to prepare employees for any actions they must take, when a hazard must be mitigated. Employees must be trained to report even minor issues, e.g. water on the stairs, broken windows, etc. so that these issues can receive immediate attention.

Staff must also report issues that affect the security of the school, like a door that won't close, or a lock that seems weakened. These issues are above the level of detail that most staff members might feel comfortable with and will need to become part of the Web Helpdesk resolution process.

Monitoring and Management of Health, Safety, Security, and Environmental Programs
Monitoring hazards to ensure that they receive remediation will be accomplished through the Web Helpdesk function. Any health and safety tickets that are open more than 48 hours will receive additional attention from the School Director.

Costs related to safety and security will be monitored. Changes in these costs can be early warning indicators of impending issues. Avoidance of undue costs can be accomplished by monitoring trend lines for these issues.

Compliance with Regulations
Quest will use its extensive relationship network to ensure that all compliance requirements are understood and met. When required, additional professional development will be obtained or consultants engaged, so that all regulations are understood and complied with.

Remediation Management
When unsafe or perilous conditions cannot be immediately remediated, the work must be contracted to external entities that can accomplish this work in a timely fashion. Managing the expectations and deliverables will be the responsibility of the ED and then delegated to the Director of Management

services, once he or she is hired. The Phase 1 tasks related to Health, Safety and Security Management are listed here.

Task ID	Health & Safety Tasks	Person Responsible	Months Before School #1 Opens
30	Develop Crises Plan for CoS	Executive Director (ED)	12
21	Develop Crises Plan for Schools	ED & Co-Developer (1st School Dir.)	11
65	Implement Health and Safety Tickets in Web Help Desk	ED & Co-Developer (1st School Dir.)	4
74	Develop Health and Safety Programming	ED and HR Consultant	2

11.0 Managing Intergovernmental and Other Agency Affairs

Building and maintaining relationships with funders is important work and needs to be planned and intentional. For this reason, a short-term consultant will be hired to be involved in this work until Quest can support a staff position. Functions in this area include:

Funder Relationship Building

Quest has made every effort to control start-up and on-going costs. However, at start up, Quest will require funding above the per pupil allocation to develop an organization capable of providing the type of education experiences we envision. We will solicit this funding from interested 3rd parties.

Management of Government and Other CMO Relationships

To ensure the long-term viability of Quest, the ED and whomever it is delegated to, will work at building effective and productive relationships with the Wisconsin Department of Public instruction, the City of Milwaukee's Charter School Office and all other external stakeholders who have major vested interests in Quest

Using solid relationship management principles, Quest leadership will undergo periodic training, professional development, and coaching in the area of relationship building to ensure that Quest management has the best preparation possible to develop, grow and protect key relationships.[106]

Relationship with Quest Board

The Executive Director will have the primary responsibility of managing the Quest management team's relationship with the Quest Board. The relationship should be one that includes a high level of trust and collaboration. Quest management will receive periodic opportunities to interact with the Quest Board during strategic planning and other organizational assessment and development activities.

Management of Legal and Ethical Issues

A code of ethics has been developed to help provide boundaries to employee behaviors. This will become part of new employee on-boarding.   Management staff will receive professional development

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[106] (Acuff, 2007)

in this area to assist them with recognizing situations that might prove difficult to navigate on their own. Through effective professional development and on-going management meetings, most issues will receive proper attention. More complex legal issues might require the retention of proper representation.

Public Relations Program

Along with effectively managing key stakeholder relations comes the area of effective public relations. This includes managing the public's perception of the Quest image. This often comes into play during times of crises, but must receive attention before any crises occurs.

Media relations training and preparation must be planned for and accomplished soon after Quest becomes operational. The community stakeholders should receive positive messaging regarding the value that Quest brings to the community as well as the value it will bring in the future.

A communications protocol for crises events will be established. The protocol will be part of the on-boarding process for Quest employees. There will be one designated contact for external media relations. In the event that a crisis does occur, this contact will be the designated voice for Quest. The Phase 1 tasks related to managing intergovernmental affairs are listed here.

Task ID	Intergovernmental Tasks	Person Responsible	Months Before School #1 Opens
33	Meet with Alderman in District of School #1	ED & Co-Developer (1st School Dir.)	11
34	Meet with Neighborhood Groups and Stakeholders	ED & Co-Developer (1st School Dir.)	11

12.0 Knowledge Management, Organizational Improvement, and Change

Knowledge Management is an important aspect of any organization that seeks continuous improvement. Quest has designed this competency into its structure. The School Operating Processes and Center of Support Services will receive continuous improvement to ensure that the Quest Vision, Mission and Values are being fulfilled in each school and by the CoS.

Knowledge Management Strategy

Improvement teams

Team Name and Chairperson	Team Focus
School Leadership Team – Chair: Executive Director	• Overall school metrics • Center of Support process improvements • Quest culture and communications
Culture and Discipline Team – Chair: Director of School Services	• School culture metrics and observations • Consistency in coaching and discipline

	Professional Development needed for staff
Data and Curriculum Team – Chair: Director of School Services	• System improvements • Interventions needed
School Operations Team: – Chair: Director of Management Services	• Center of Support process improvements • Finance, IT, and Human Capital needs • Facilities support issues

Creating semi-public accountability for results can produce the benefit of teams working passionately to obtain those results.[107] This may be the best way to ensure that improvement needs and accomplishments are as transparent as possible. Key initiatives and action items owned by these teams will be shared with all Quest employees via an intranet page to help build an environment that respects and expects continuous improvement. The teams listed in Table 9 are envisioned to drive and sustain continuous improvement efforts.

These teams will meet periodically (weekly, bi-weekly, or monthly) to assess performance and develop

Table 9. Quest Process Improvement Teams.

improvement plans for each focus area. Communications cascading will be used to share accomplishments and the remaining challenges that exists in each focus area.

Quest teams will use tools generally accepted outside the world of education to evaluate and improve all of its operational aspects. Some of those tools appear in Table 10.

Tool Name	Description
Cost of Quality	A method of tracking expenses related to quality and shifting those expense so that more is spent on proactive measures versus reactive measures. In other words, attempting to drive leading indicators instead of lagging indicators.
DAMIC	The acronym stands for Define, Analyze, Measure, Improve and Control. It is the preferred problem solving methodology in what has become known as six sigma quality. Quest will use this process for academic and non-academic needs and will consider teaching it to students as part of the curriculum.
Five Whys	A method of clarifying root cause by asking "Why" five times. Generally, by the 3rd or 4th "Why" it becomes clear what are symptoms and what was the root cause.
Flow Charting	A method of visually documenting a flow of information, goods or objects that facilitates a high degree of mutual understanding.

[107] (Lencioni, The Five Dysfunctions of a Team, 2002)

QFD	Quality Function Deployment is a qualitative tool for ensuring that customer or organizational design goals are properly articulated in the final design of a service or good.
Statistical Control	Using statistical analysis to understand sources of process variation and control those sources to limit variation.
Value Analysis	A method of reviewing existing and new processes to ensure that all facets of the process and value to operations. Those that don't are eliminated, unless they are related to compliance requirements.

Table 10. The 7 Quest Continuous Improvement Tools.

Performance Benchmarking

Benchmarking is the continuous process of measuring products, services and practices against the toughest competitors or those organizations recognized as industry leaders.[108] Quest will implement an on-going benchmarking process to ensure that best-in-class processes and practices are observed and evaluated and then made part of the organizational learning for Quest.

The APQC developed Process Classification Framework (PCF) allows for on-going, cross-industry, benchmarking. The Education PCF allows Quest to effectively share benchmark results with participating schools across the country and to develop and implement improvements that are very targeted in fit and scope.

We have continued our discussions with APQC, asking that Quest have access to existing benchmarking studies, as part of a reduced fee membership program that APQC intends to implement for smaller organizations.

Quest-Wide Knowledge Management Capability

The purpose of Knowledge Management is to allow an organization to benefit from the collective knowledge that resides in that organization by using that knowledge to achieve the organization's mission.[109] This area of organizational sciences is undergoing a rapid evolution, in part from the maturation of several technologies; including blogging and other social media.

The implications of this rapid evolution may have profound impact to Quest, because this may be the first time in history that there is such a strong confluence of knowledge management, social media, and substantive research on what works and what does not work in schools. An organization that embraces these three practices should be able to shorten learning times and be able to adequately absorb steep learning curves, during its growth and beyond. Our intention is that Quest will be the type of organization that can learn from its challenges and adapt and improve as it faces each new challenge.

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[108] (Camp, 1989)
[109] (McInerney, 2002)

Change Management

Quest will institute an effective change management from its inception. Successful frameworks for change involve many of the steps in Table 11.

Steps	Steps in the Framework for Change
1	**Assess**: Analyze the data for an accurate diagnosis of the "as is" situation and create and understanding of the change problems
2	**Plan**: Articulate and define the tactical change process required to bridge the gap between the "as is" and the "to be".
3	**Implement**: Support and reinforce commitment.
4	**Renew**: Involve and empower people toward a shared vision and a cultural change.

Table 11. Framework for Change [110]

The Phase 1 tasks related to Knowledge Management are listed here.

Task ID	Knowledge Management Tasks	Person Responsible	Months Before School #1 Opens
22	Develop Initial Flow Chart for All CoS Processes	Executive Director (ED)	13

Summary of Process Areas and Responsibilities

The functions described above in the 12 process areas will be executed at each staffing level and do not require a fully staffed CoS to implement. During phase 1, when the Executive Director is the only staff member in the CoS, the support functions will be accomplished by him with the assistance of external consultants.

The processes called for in sections 1.0 through 12.0 will be mapped or flowcharted, prior to them being implemented. Changes to written procedures will then be considered. As the first school is developed, the first interning School Director (Network Co-Developer) will be relied upon to assist with much of this development. As the other schools are under development, these processes will become part of each interning School Director's on-boarding process.

During Phases 2 and 3 of our growth, as additional support staff are hired at the CoS, the work will be transitioned to those staff members. This redistribution of duties is shown as part of the Quest Responsibility Growth Matrix in Table 13. School based and network processes will be reviewed, improved and implemented as each new school developed.

Relationship of Schools to the Center of Support

The relationship between the CoS and Quest schools will be a collaborative relationship. School personnel need to feel that the CoS is providing valuable services that allow schools to focus on the

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[110] (David Carr, 1996)

business of education. Staff members at the CoS must believe in and use servant leadership as the lens through which they provide services. This criteria will become part of the selection process for CoS personnel.

Theory of Change: Projected Impact

Quest believes that a thoughtfully constructed educational model or network, based on research and continually improved upon through internal and external benchmarking, will produce outstanding results for students and all stakeholders. And, that this network will prove to be attractive to talented teaching professionals, students and their families and supportive funders; all seeking the promised dream of educational equity.

Growth Strategy

The Quest growth strategy is to develop and open each of our schools with an incoming class of 6th and 7th grade students and to add one grade per year until each school is at the capacity of 470 - 475 students. We will open our first school in 2013 and perfect the model for 2 years before opening our next school. The growth in students is summarized below, assuming a 10% combined rate of retention and attrition. Network growth is spread across three phases and is shown in Table 12.

Number to Serve/Impact	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21
Growth Phase	Phase 1		Phase 2		Phase 3				
# of Quest Schools	0	1	1	2	3	3	3	3	3
# of Students	0	180	252	497	805	995	1,165	1,271	1,371

Table 12. Network Growth Projection.

Market Niche

The Quest blended learning model facilitates a strong entry into an educational market place with few innovative competitors. When factoring in the project-based approach as an integrated learning strategy, we feel that Quest will be strongly differentiated from existing 'old model' schools. The Quest model is designed to move marketable skills into students' hands, based on their interest, from their first day of school. Therefore, potential Quest students will be attracted to the 21st Century tools we will provide, which will be recognized by students and their families for their relevancy to real-life skills.

Business structure

Quest is a non-stock, non-profit Wisconsin corporation and operates as a project under the umbrella of the Institute for the Transformation of Learning (ITL) at Marquette University. The organization is staff by an Executive Director and is guided by a 3 member development board of directors. We are in the process of seeking non-profit status.

Quest will apply to the City of Milwaukee for a charter for School # 1 in February, 2012. In the spring of 2012, Quest will learn if its application for a charter has been approved. Quest will seek planning grants

to fund further development of the model and to cover the salary of the Executive Director from March, 2012 through September, 2013.

Upon the successful funding of this Business Plan, the Board will be expanded from the current developmental board to a full board. The 1st School Director, who will also function as the Quest Co-Developer, will be hired to finalize the operational details for school #1. At this time, activities that make up the Growth Strategy will be accelerated.

Planning will then switch from a calendar year basis to a school year basis. The Growth Strategy has been organized into 3 different phases, each with a unique set of activities, tasks and outcomes. The CoS team structure, for each phase of Quest's growth, is displayed in Table 13.

Center of Support Team Structure

To help guide our thinking about the growth of Quest, we developed the matrix, detailed in Table 13. This matrix indicates the functional areas of responsibility and the corresponding staff members during each the 3 phases of growth. The matrix is intended to facilitate the creation of transition planning for each phase of the CoS growth and the professional development needed for incoming CoS staff members.

Process Areas	Phase 1	Phase 2	Phase 3
1.0 Strategic Planning	ED	ED	ED
2.0 Develop Assess Curriculum	SD & ED-C	SD & DSS	SD & DSS
3.0 Support Processes	SD & ED-C	SD & DSS	SD & DSS
4.0 Operations	SD & ED	SD & DMS	SD & DMS
5.0 Stakeholder Relations	ED	DSS	DD
6.0 Human Capital	ED-C	DMS-C	DHC
7.0 Information Technology	ED-C	DIT	DMS-C
8.0 Finance	ED-C	DMS-C	DF
9.0 Facilities	ED	DMS	DF
10.0 Health & Safety	ED	DMS	DMS
11.0 Government Affairs	ED	DSS	DHC
12.0 Knowledge Management	ED	ED	DD

Position Key

-C = with the support of an external consultant	
ED = Executive Director	DHC = Director of Human Capital
SD = School Directors (3)	DF = Director of Financial Services
DMS = Director of Management Services	DD = Director of Development
DSS = Director of School Services	DIT = Director of Information Technology

Table 13. Responsibility-Growth Matrix

The global responsibilities of the CoS and the functional processes supported through the CoS will remain consistent. As new CoS team members are brought on, the existing responsibilities will be transitioned to them. To ensure that network functions are properly executed during the early stage of growth, the CoS team will need access to the following consultants to assist with operations:

- Development Consultant for Stakeholder Relations (SY 2013 through SY 2017)
- Human Capital Consultant for recruitment and HR work(SY 2013 through SY 2016)
- Information Technology (SY 2013)
- Finance (SY 2014 through SY 2015)

Executive Director

Finance Consultant

1st School Director
(Quest Co-Developer)

Human Capital
Consultant

IT Consultant

Development
Consultant
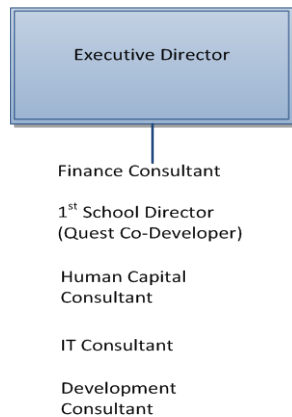
Figure 7. Phase 1 Structure.

Network Growth - Phase 1

Early in Phase 1, the primary staff member will be the Executive Director (ED) and the School Director for Quest School #1 (the network co-developer). The ED will contract with consultants to accomplish some of the identified CoS tasks. It is anticipated that many of these tasks will have to do with documenting and integrating new processes, as outlined above. Later in this document, we provide a detailed task list, laying out activities and responsibilities for Quest from October, 2011 until September, 2013, when the first school opens.

During the 2013-14 school year, we will start the first school with 180 students and then add 90 in the 2014-15 school year. At that time, we will have performance data from our first school that we will analyze and include as part of our application to the City of Milwaukee's Common Council for charters to open 2 additional schools. An interning School Director for SY 2015-16 will be hired and begin executing the New Schools Protocol (Table 4).

Green Light Procedure

Prior to opening our 2nd school, we will assess several criteria. If these criteria are met, the Quest Board will give the Executive Director the 'green light' to execute Phase 2 of our growth strategy. These criteria include, but are not limited to:

- Have we secured a School Director?
- Have we secured a building for our next school?
- Have we met at least 70% of our authorizers metrics (or are there enough metrics solidly trending upward - to demonstrate our model's long-term efficacy)?

Phase 2 – Network Growth

If the green light is given, Quest will open its second school in the 2015-16 school year and continue the growth of our first school. Quest

Quest Administrative Structure Phase 2

| School #1 6th through 8th | School #2 6th through 12th | CMO Shared Organizational Functions and Units |

School Director

School Director

School Leadership Team
Chair: Executive Director

Dean of Students

Dean of Students

Discipline and School Culture Team
Chair: Director of School Services

Curriculum Coach

Curriculum Coach

Data Driven Instruction and Curriculum
Team, Chair: Director of School Services

Administrative Assistant

Administrative Assistant

School Operations Team
Chair: Director of Management Services

Executive Director

Director of School Services

Director of Management Services

Schools

will then hire 3 directors for the CoS and the staff will consist of: the Executive Director, the Director of School Services, the Director of Management Services, and the Director of IT.

The Quest Improvement teams will also be initiated and provide additional fine-tuning and improvements to the model. These teams, although chaired by CoS personnel, will be focused on servicing operational needs of each school. The team chairs will function as facilitators, to help drive overall communication and continuous improvement efforts. The teams are structured to accelerate Quest's organizational learning from our first school and to develop bench strength in specific competencies.

Phase 3 – Network Growth

During Phase 3 the size of the CoS growth will peak. The Directors of Human Capital, Finance and Development will be hired.

As Quest grows, the duties of the startup staff will need to shift. All work previously performed by consultants will be transitioned to CoS staff. At this point, the staffing model and structure will shift to that detailed in Figure 9.

It is anticipated that the staff will have refined the

Figure 8. Phase 2 Structure.

documented processes and have made a number of improvements in these processes. These improvements in efficiencies should help the Quest CoS to reduce overall costs in the long run and to share those savings with the schools it serves.

Quest Administrative Structure Phase 3

| School #1 6th through 12th | School #2 6th through 12th | School #3 6th through 12th | CMO Shared Organizational Functions and Units |

School Director / Dean of Students / Curriculum Coach / Administrative Assistant

School Leadership Team Chair: Executive Director

Discipline and School Culture Team Chair: Director of School Services

Data Driven Instruction and Curriculum Team, Chair: Director of School Services

School Operations Team Chair: Director of Management Services

Executive Director

Director of School Services / Director of Mgt Services / Director of Human Capital / Director of Finance / Director of Development / Director of IT

Schools

Figure 9. Phase 3 Structure.

Quest Resource Requirements

Financial Assumptions

The following assumptions are part of the financial model.

- State per Pupil Funding will remain at the current level of $7,755
- Quest will successfully apply for and receive 3 WFF Phase III Combination Start-up Grants (one for each school)
- Quest will successfully apply for and receive planning, implementation and dissemination grants from the state of Wisconsin Department of Public Instruction for each of our 3 schools.
- Facilities rental or lease costs will be $10/square foot or less
- Facilities energy cost will be $5/square foot or less
- Inflation rate will be 2.7% or less
- COLA will be 2.7% or less
- Health insurance cost to be 16% of salaries or less
- Dental Insurance costs to be 2% of salaries or less
- Employer Tax to be 9.5% of salaries or less

Financial Requirements

The long term financial goals for Quest include financial independence from startup-funding. Many CMO's have this as a goal. Quest has built this into the financial plan to be accomplished by the 6th year of operation. The Financial Appendix includes an in-depth presentation of the Quest financials and contains the documents shown in Table 14.

Document Tab	Notes
Quest School Based Financial Summary	Shows a summary of school level, overall Revenue and Expenses, against student count, for the 3 schools for SY 2013 - 22
Quest CoS Financial Summary	Shows a summary of the network taxes derived from each school, the CoS expenses and the 3rd source funding required to support the CoS during the build out, for SY 2012 - 22
Quest School 1 Financial Model	Details the revenue and expenses, at the school level, for 8 years (SY 2013- 21) for School 1
Quest School 1 Financial Notes	Details the assumptions used in developing the budget model for 8 years (SY 2013-21) for School 2
Quest School 2 Financial Model	Details the revenue and expenses, at the school level, for 8 years (SY 2015- 23) for School 2
Quest School 2 Financial Notes	Details the assumptions used in developing the budget model for 8 years (SY 2015-23) for School 2
Quest School 3 Financial Model	Details the revenue and expenses, at the school level, for 8 years (SY 2016- 24) for School 3
Quest School 3 Financial Notes	Details the assumptions used in developing the budget model for 8 years (SY 2016-24) for School 3

Facilities LLC Financial Model	Details the expenses that will be paid by the LLC on behalf of the schools and the Facility charges that each school will be assessed.						
Facilities LLC Financial Notes	Lists the expenses that make up the overall facilities expense.						
CoS Financial Model	Details the revenue and expenses for 10 years (SY 2012- 22) for the Center of Support						
CoS Financial Summary	Details the assumptions used in developing the budget model for 10 years (SY 2012- 22) for the Center of Support						

Table 14. Financial Appendix Contents.

Human Capital Requirements

Center of Support

The Quest Human Capital needs are detailed in Table 15, by school year. For essential functions, contractors are retained until sufficient student count is achieved. At that point, those positions will be transitioned to new employees.

Number of CoS Staff (FTEs)	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19
Employees	Phase 1		Phase 2		Phase 3		
Executive Director	1	1	1	1	1	1	1
School Director for year 2013-14	1						
Administrative Assistant		0.5	1	1	1	1	1
Director of Information Technology			1	1	1	1	1
School Director for year 2015-16			1				
Director of School Services				1	1	1	1
Director of Management Services				1	1	1	1
School Director for year 2016-17				1			
Director of Finances					1	1	1
Director of Human Capital					1	1	1
Director of Development						1	1
Consultants							
IT Consultant		0.5					
Development Manager / Grant Writer		0.25	0.25	0.25	0.25		
HR Consultant	0.5	0.5	0.5	0.5			
Finance Manager		0.25	0.25	0.5			
TOTAL Center of Support (FTEs)	**2.5**	**3.0**	**5.0**	**7.25**	**7.25**	**8**	**8**

Table 15. Human Capital Needs - CoS.

Measures for Success

Quest will use the Children's Research Center School Rating Scale as the basis of measuring success. This scale has metrics for:

- Student Academic Progress
- Postsecondary Readiness
- Student Academic Achievement
- Local Measures
- Engagement

Score Card

A score card is an at-a-glance guide to the impact of current activities on overall strategy. Some of the elements Quest is considering for its scorecard are in detailed in Table 16. These measures are in addition to those listed as part of our objectives.

Network	School Level
Enrollment Rate > 95% of Capacity	Daily Attendance Rate > 95%
Average dress code violations	Daily dress code violations < 5%
Principals complete > 90% of teacher observations	Teachers complete 100% of Edmodo entries < 2 days
Yearly expulsion rate < 3%	Daily Suspension rate < 3%
< 3 % of grads Need Remediation at Next Level	< 3 % of grads Need Remediation at Next Level

Table 16. Metrics to Consider.

Key Factors for Success

Quest has identified key factors for success. These factors will become immediate areas for Quest to focus on. A discussion of these areas and how Quest will address them is detailed in Table 17.

	Risk Factors	Counter Measures to Mitigate Risks
Strategic Planning	- Strategic planning at the school level can be time consuming and challenging. - Strategy is not always linked to operations. A plan can be developed and filed away until time to revise it.	- Quest will build this into its yearly calendar and involve a cross section of stakeholders. - Quest will use a score card to continually assess progress against the strategic plan.
Develop Assess Curriculum	- There are few if any flex model blended learning schools in the Midwest. When factoring in the Project-Based component, the model Quest is proposing may be even more unique. - The Charter School authorizers and the WI department of public instruction may have issues with specific components.	The New School Protocol will help ensure the fidelity of implementing specific components of the model. Incoming principals will intern at locations that have similar educational components. An analysis of possible obstacles and solutions becomes part of their planning process

Support Processes	• Most of these services lend themselves to being externally provided, because of the nature of the service.	• Quest will implement a strong contracting framework for evaluating service providers before, during and after services are provided.
Operations	• As Quest is implemented, operational excellence might be compromised by the distraction attributed of growth.	• Quest will implement process improvement teams to assist with deep implementation of best practices. • Teams will have autonomy to make improvements.
Stakeholder Relations	• Growth might be a distraction to activities meant to strengthen stakeholder relations.	• Quest will put resources in place to make this part of the overall strategy. • This will also be reviewed by the leadership team on quarterly basis.
Human Capital	• Finding great teachers who fit the culture might be a challenge.	• Quest will partner with a consultancy and a recruiting service to ensure that the best pool of candidates is available. • Quest articulates its talent needs to ensure that teachers know the cultural expectations. • Quest will position its salary base to allow it to attract teachers with the tenor and talent needed to carry out the strategy.
Information Technology	• IT integration • The cost of technology	• Quest will develop solid IT processes that will assist with the integration of technology and will help Quest to monitor IT costs. • Google Chrome books will allow Quest to control costs more than standard PCs. • The Web Help Desk will provide data to ensure that cost are monitored and kept under control.
Finance	• The business plan implementation is predicated on securing additional funding to support the CoS until the 5th year of operation.	• Quest will have well documented procedures and will hire management personnel who have a successful track history with financial operations.

Facilities	• Unknown or unforeseen facilities issues might be a drain on operational budgets. • Facilities costs might beyond budgeted allocations.	• Quest has benchmarked several CMOs, most notably The Noble Network, who has developed operational benchmarks to guide their facilities decisions. Quest will continue to partner with CMOs to help inform its work in this area. • Quest has taken a conservative approach to cost allocations.
Health & Safety	• Health and safety issues are not usually a huge part of educational organizations management focus.	• Quest will proactively address this area, in an attempt to mitigate and manage risks, before they negatively impact operations. Quest will implement a health education initiative that will help address issues proactively..
Government Affairs	• Managing deadlines and due dates and relationships can be a distraction to the educational leader of schools.	• Quest will establish an organization wide calendar that will help drive accountability. • The Quest CoS will take leadership in managing relationships for its schools and where appropriate act as a facilitator of improving those relationships.
Knowledge Management	• Stakeholders will need to see proof that their investments are paying off.	• Quest will use ongoing continuous improvement to ensure that organizational learning occurs rapidly and is disseminated effectively to stakeholders. • Quest will ensure that all organizational metrics support those stipulated by funders.

Table 17. Operational Risks and Countermeasures.

Partnerships

APQC

The Process Classification Framework was chosen as the framework to organize Quest processes for the explicit purpose of establishing on-going benchmarking. Discussions have begun with APQC to acquire a small school membership, allowing Quest to have access to benchmarking studies completed by districts. The discussions have led to an expanded awareness from APQC that single school charter organizations and CMO organizations have many of the same needs in regard to benchmarking, but don't have the same level of resources that a district has.

ASQ

Quest is uniquely situated to leverage the considerable resources of the American Society for Quality. This organization is developing solid frameworks for viewing continuous improvement in schools and school system. As Milwaukee-based organizations, Quest and ASQ will continue collaboration in the future.

Possible Partnerships

Partner Name	Reason for Partnership
Achieve 3000	Vendor Relationship
ADP	Vendor Relationship
Big Picture Schools	Learning Partner
Brain Honey	Vendor Relationship
Building Excellent Schools	Learning Partner/School Leaders
Compass Odyssey	Vendor Relationship
e-2020	Vendor Relationship
Education Elements	Learning Partner & Vendor
EdModo	Learning Partner & Vendor
EdVisions	Learning Partner
E-Portfolio	Vendor Relationship
Google	Vendor Relationship
Great Lakes Constructivist Consortium	Learning Partner & Vendor
K12 – Aventa	Vendor Relationship
Moodle	Vendor Relationship
Nolan	Vendor Relationship
Parallel Staffing	Vendor Relationship
Pinnacle Office Solutions	Vendor Relationship
Project Foundry	Vendor Relationship
SchoolSpring	Vendor Relationship
Teleo	Vendor Relationship
Walton Family Foundation	Funding Partner
Web HelpDesk	Vendor Relationship

Quest Leadership

Board of Directors

Dr. Robert M. Davis– Board Chair

Robert Davis is the President & CEO of the Zoological Society of Milwaukee. He has been in this position since January 1, 2006. He came to the Zoological Society in July 2005 as the Chief Operating Officer. As President & CEO, Dr. Davis leads all operational aspects of the Zoological Society. This position oversees management of a full-time staff of 53, a part-time staff of 12, 20+ interns and a volunteer organization of 557 members and a general membership of 53,000 households.

As President & CEO, Dr. Davis concentrates on fundraising, strategic and business planning as it helps to shape the future of the ZSM and its relationship with the Milwaukee County Zoo. He also is involved in community development and diversity issues. Dr. Davis will lead the Society in supporting the Milwaukee County Zoo to brand itself as a local and national treasure through identification and enhancement of the overall image and awareness of the Zoo.

Prior to serving the ZSM, Dr. Davis was the administrative head of Education at the Lincoln Park Zoo, Dr. Davis was responsible for more than 15 program areas, with more than 25 ongoing projects and programs. In this role he provided visionary leadership to the Education department overseeing all functions of the department working in collaboration with other scientific, academic and conservation organizations such as the World Wildlife Fund, United States Fish and Wildlife Service, the Metro Chicago Boys and Girls Clubs, the Chicago Board of Education, Brookfield Zoo, DuSable Museum, Shedd Aquarium and several local colleges.

Dr. Davis has been active on numerous boards and committees. He was most recently appointed to the Board of CEO leadership Academy which is a public Charter School under the jurisdiction of the City of Milwaukee's Common Council. He is the Board Member of Quest Milwaukee, a not-for-profit organization located in the Center for Transformational Learning at Marquette University and he served on the Board of Directors of The Milwaukee Area Technical College (MATC) from 2007 - 2010. Dr. Davis is on the Independence First Board of Directors and he recently joined the Milwaukee Film Board.

Dr. Davis also serves as the Past Chair of the Diversity Committee of the American Zoo and Aquarium Association (AZA). He was honored in 2008 by the Association of Zoos and Aquariums as a recipient of the AZA Outstanding Service Award for his role as the Chairperson of the Diversity Committee from 2004-2007. He also serves as an Advisor to the AZA Conservation Education Committee and is a founding member of the AZA Trends Committee. Dr. Davis is the past president of the Chicago Tuskegee University Alumni Club and was the chairperson of the National Alumni Association Biennial Convention in 2002 in Chicago, Illinois. He is also on several committees with the American Association of Museums,

the National Science Foundation, the Association of Science and Technology Centers, the National Science Teachers Association, the American Association for the Advancement of Science and more.

Dr. Davis holds a degree in Veterinary Medicine from Tuskegee University and Bachelor of Science, in Animal and Poultry Sciences, Tuskegee Institute (University).

Howard Fuller, Ph.D. – Board Member

Howard Fuller's career includes many years in both public service positions and the field of education. Dr. Fuller is a Distinguished Professor of Education, and Founder/Director of the Institute for the Transformation of Learning at Marquette University in Milwaukee, Wisconsin. The mission of the Institute is to support exemplary education options that transform learning for children, while empowering families, particularly low-income families, to choose the best options for their children.

Immediately before his appointment at Marquette University, Dr. Fuller served as the Superintendent of Milwaukee Public Schools June 1991 - June 1995. Dr. Fuller became nationally known for his unending support for fundamental educational reform.

His prior positions included: Director of the Milwaukee County Department of Health and Human Services 1988 -1991; Dean of General Education at the Milwaukee Area Technical College 1986 - 1988; Secretary of the Wisconsin Department of Employment Relations 1983 - 1986; and Associate Director of the Educational Opportunity Program at Marquette University 1979 - 1983. He was also A Senior Fellow with the Annenberg Institute for School Reform at Brown University 1995 - 1997.

Dr. Fuller received his B.S. degree in Sociology from Carroll College in Waukesha, Wisconsin, in 1962; M.S.A. degree in Social Administration from Western Reserve University in Cleveland, Ohio, in 1964, and his Ph.D. in Sociological Foundations of Education from Marquette University, Milwaukee, Wisconsin in 1986.

He has received numerous awards and recognition over the years, including four Honorary Doctorate Degrees: Doctorate of Humane Letters from Carroll College in 1987; Doctorate of Laws from Marian College, Fond Du Lac, Wisconsin in 1992; Doctorate of Business and Economics from Milwaukee School of Engineering in 1995. Doctorate of Humane Letters from Edgewood College, Edgewood College, Madison WI.

He is the Chair of the Board of: CEO Leadership Academy and Quest Milwaukee. He also serves on the Board of the Black Alliance for Educational Options, Partners for Developing Futures and Milwaukee Charter School Advocates. He is an Advisory Board member of the Big Picture Company and the National Association for Charter School Authorizers.

Dr. Deborah McGriff – Board Member

Deborah McGriff is a partner at the NewSchools Venture Fund and leads their Academic Systems Initiative. She also contributes to investment strategy and management assistance for portfolio ventures, including charter management and school turnaround organizations.

Dr. McGriff has been committed to transforming the lives of underserved urban school students for almost four decades. In 1993, Deborah became the first public school superintendent to join EdisonLearning (formerly Edison Schools). There, she held numerous positions at the company, including President of Edison Teachers College, Executive Vice President of Charter Schools, and Executive Vice President of several external relations functions.

Prior to joining EdisonLearning, Dr. McGriff served as the first female General Superintendent of Detroit Public Schools. Crain's Detroit Business named her Newsmaker of the Year for 1992. Before that, she was the first female Assistant Superintendent in Cambridge, Massachusetts and the first female Deputy Superintendent in Milwaukee, Wisconsin. She was a teacher and administrator in the New York City Public Schools for more than a decade.

Dr. McGriff holds a bachelor's degree in education from Norfolk State University, a master's degree in education with a specialization in reading pedagogy from Queens College of the City University of New York, and a doctorate in Administration, Policy and Urban Education from Fordham University.

Dr. McGriff is former President of the Education Industry Association. She currently serves on the board of the National Alliance for Public Charter Schools, where she also is an executive committee member, as well as founder and national board member of the Black Alliance for Educational Options. She also serves on the advisory boards of the National Council on Teacher Quality and of the Program on Education Policy and Governance at Harvard's John F. Kennedy School of Government, as well as the Technical Working Group for a national evaluation of the Federal Charter Schools Program being led by WestEd. Deborah is also a member of the Review Board for the Broad Prize in Urban Education and board member of Quest Milwaukee.

Executive Director

Edgar Russell is an education executive with a proven track record of success. His background includes leadership in not-for-profit and for-profit organizations. He holds a master's degree in Organizational Leadership & Quality and a bachelor's degree in Quality and Productivity Management. Most recently he led a multi-state region of a for-profit organization with more than 300 associates and more than $11M in sales. For 4 years, under his leadership, the region continually grew in services offered, revenue generated and profit realized.

He has led the development work at Quest – Milwaukee since October of 2010 and has supported the Quest Board of Directors in pursuing a new educational model for the Milwaukee area that will provide low-income students in the city with a response to many of their educational needs.

Edgar's work is supported by his experiences at Catapult Learning (Executive Director), LLC; Delphi Automotive Corporation (numerous positions including quality, education / training & organizational development), and the YWCA of Greater Milwaukee (Operations Director). At each of these organizations, he provided innovative solutions to the complex issues and unique challenges that each of these organizations faced.

Some of Edgar's experiences that will support his work at Quest:
- At Catapult Learning, his team implemented over 20 rotation-model, blended learning labs at various schools in support of their Title I instructional programs and he assisted with developing the strategic visioning supporting the rapid growth of the company's business in the western United States.
- At Delphi, he implemented blended learning in supporting instruction in Spanish Language acquisition, computer applications, and a competency-based high-school completion program and he also developed strategic relationships with area colleges for them to present their programs on-site and have content that supported organizational growth,
- At Mt. Calvary, he designed, implemented and administered a school network with over 50 workstations that's supported instructional reinforcement in math, reading and writing and he also provided direct leadership and management to the school during an extended principal vacancy through creation of a leadership council.

In his private life, he serves as the Congregational President of Mt. Calvary Lutheran Church and School in Milwaukee; where he has also held positions as the chair of their board of education, member of their finance committee, and member of their fund development committee. He is currently involved in leading the church through a strategic re-visioning process that will engage and support the community immediately surrounding the church.

Edgar is a Milwaukee resident and is married to Darlene, a program officer for a non-profit agency. Together, they have six children, three who are still at home and three adult children. In his spare time he is an avid reader of anything that touches on leadership, community, or families.

The Quest Parable – A Story about Three Students

This is a fictional story about 3 Quest students and their unique responses to the learning environment at Quest. It is also a story about how each found his or her own success, by focusing on their personal assets, passions and interests.

John is a very intelligent junior who is under motivated and does just enough to get by. He is relatively shy and doesn't volunteer much in class. He prefers to use his time and energy away from school for video games and hanging out with the boys. He transferred to Quest from a college prep school, where his parents were not been able to keep up with the tuition payments. His parents are hoping that his experience at Quest will help prepare him for college and beyond.

It is 10 weeks into the school year and John starts his day by arriving a bit early, so he can spend time on his Java programming project. He is the leader on a project to develop an e-commerce system for the small hobby shop, where he interns. This is a project that he would have never thought possible for him to take on, much less be able to successfully complete it. It forced him to collaborate with other students and to take a leadership and teaching role as part of managing the project outcomes.

Time	Activity
7:30	Students Arrive
8:00	Morning Meeting
8:30	Instruction
Noon	Lunch
1:00	Project Reviews
2:00	Interning
3:00	Interning
4:00	Interning
John's Monday Schedule	

John is focused on coding, when he realizes that the school is beginning to fill and it will soon be time for the morning meeting. When he first transferred, John hated these morning meetings. However, he has come to see them as a useful time for students to get on the same page. The morning meeting proceeds with announcements about events and visitors who will be onsite in the next few days. It continues with recognition of several students who have attained their personal bests and recognition of his own advisory group, which has achieved a 10-week school-wide best of 98% attendance. John feels a bit of pride, knowing that he did not miss a day this year.

After the morning meeting, john logs into Edmodo and sees his fellow advisory group's comments about their accomplishment and a few students vowing to reach their own personal attendance best in the next trimester. John is reviewing comments from his advisors and sees that his latest project assessment has been posted in Project Foundry. He stays logged into Edmodo and logs into Project Foundry to look at his assessment results. John's writing is not meeting standards.

John is pleased about the rest of his assessment. He received positive feedback from his intern site where he helps with website maintenance and will eventually get more involved in development. His mentor at that site has introduced him to additional technologies that they use in their work that are beyond what most high school aged youth have access to. John logs into the Learning Management System and the Quest instructional portal and begins to work on writing for the day. He will have to

improve in this area, since his individual project for the next trimester includes writing the operations manual for the hobby shop's website.

Cori was out of school for a year, when she enrolled at Quest. She will need to complete just over a year's worth of credit to graduate this coming spring. After working at fast food restaurants and being laid off, she has decided to complete her education while working. She gets to school most days just about the time morning announcements start. She is bright, intelligent and articulate. Unfortunately, Cori is a member of a statistically significant group who do not see value in most of what is presented in high school.

However, at Quest, Cori has been able to design a learning plan that allows her to pursue her interests. Since she is a skeptic by nature, it took a while for her to really believe that this school wasn't going to tell her what to study and when to study it. After the first week or so went by, she began noticing that most of her peers were engaged in their work and less apt to spend time socializing with her via Edmodo. At that point, she decided to review a couple of the videos from her boot camp and could see that she really was going to have to take initiative in determining what her education was going to look like.

After the next morning meeting, where it seemed so many other kids were being recognized, she began to listen a little more in advisory and asked other students what they were up to. At about that time, she received an invitation to attend a session with the school social worker and her advisor, via her g-mail account. She accepted the meeting, putting it on her shared calendar. At first she thought, "OK this is where the hammer comes down and they give me the ultimatums – work or fail". However, at the meeting she was surprised to be asked questions about what she needed and what she was interested in. She left the meeting with a plan scribbled on paper she borrowed from her advisor.

Time	Activity
7:30	Students Arrive
8:00	Morning Meeting
8:30	Instruction
Noon	Lunch
1:00	Project Work
2:00	Choice Time
3:00	Instruction
4:00	Dismissal
Cori's Monday Schedule	

During the next few days, she determined that she wanted to do something with music. She was already promoting a remix CD that some friends had recorded and began to ask herself; "why it was so hard for local bands to get their music noticed". She decided for formulate a question based on this query. After some quick research she logged into Project Foundry and posed the question as a project proposal. Just knowing that she would probably be turned down, she could not wait to log into the site the next morning to see the response. So, she logged into Project Foundry that night. She was more than surprised to see that the project would be acceptable; with a narrower focus and that the solution she proposed had to be usable in real life. Cori couldn't wait to get started.

Danielle was an average student who couldn't really see herself in college, even though her parents insisted that it was in her future. She came to Quest the previous year, after a less than stellar 8th grade.

In fact, her parents had to threaten her with mandatory summer school just to get her to work hard enough to complete her math project, needed for her to pass math.

Everything has been different for her at Quest. She has excelled in the individualized instruction. In her freshman year, she needed to take remedial workshops and spent many Fridays at school receiving mandatory help. Now, she is on target to complete her high school work early in her senior year. Instead of wondering if she is going to graduate, she is now looking at options including taking AP courses or taking college level courses, on-line in the 2nd half of her senior year.

After the morning meeting, she attends advisory. She then settles into her routine of checking Edmodo and Project Foundry and then logging into the instructional portal. She reviews her achievement

Time	Activity
7:30	Students Arrive
8:00	Morning Meeting
8:30	Instruction
Noon	Lunch
1:00	Project Reviews
2:00	Advisory
3:00	Instruction
4:00	Dismissal
Danielle's Monday Schedule	

against the Common Core standards and develops her strategy for the week. She has developed a passion for sociology and since becoming involved in the debate team, this has become her sweet spot with the debate team. After reviewing her latest instructional plan, she most likely will complete all of her required social studies this year and take the available AP courses in this strand, via different instructional platforms, as electives next year.

All three of these students have benefited from a more personalized approach to their education. None of them would be able to excel as they have, without the assistance of the various technologies employed at Quest. Each will benefit for years to come and be forever transformed.

Another Quest Parable – A Story about their Principal

Mr. Silver has been with Quest for a little over a year now. He started working for Quest as the Co-Developer/School Director. In this capacity as the first School Director, he collaborated with the Executive Director to develop the final details for the first school and to implement what are called the "Quest Absolutes".

That was 18 months ago. Today, he is watching students enter the building and wondering where the time has gone. As students enter the building, he glances at the school dashboard to see that the building is at 85% attendance and it's already 7:58. By this time of the morning, the school is usually at about 93% attendance. He, the school secretary and the school counselor will have to make quite a few morning calls to homes, checking to see why the missing students have not made it to school yet.

For now, those calls will have to wait until after 9:00. As he heads into the learning space, he notices that this seems to be a particularly active morning, with many students milling about the commons area a little longer than usual. So, he starts to head in that direction, greeting students as he walks to the commons.

As he is walking, he notices that one of the robot vacuum cleaners has not docked properly with its charging station and he nudges into the right position. It appears that the vacuum system is working by examining the spotless look of the floors.

As he approaches the instructional area he sees what the commotion is all about. One of the advisory groups has decided to bring in a cake for their advisor. He stops for a moment of recognition and lets the group know that and he looks forward to sampling a piece of the cake later. One of the students promises to drop a piece of cake off at his office.

He head back toward the commons area and sees Cori. Cori appears to be in a heated conversation with another student. This is not unusual for Cori. Mr. Silver heads over to see if he needs to referee this conversation. As he approaches, he picks up on enough of the conversation to recognize that it is left-over discussion from the previous day's project presentation about the food desserts that surround the school and what can be done about them.

Mr. Silver reminds Cori to keep the conversation civil and to use the Intellectual Openness skills that she has learned. Quest students spend time each week working on the Quest 21. The Quest 21 is combination of the 21st Century Skills and skills in the areas of: Reasoning and Argumentation, Learning Strategies and Skills, Precision and Accuracy, and Intellectual Openness.

Cori seems to have part of here argumentation skills fully developed, presenting her side of the discussion. She needs to develop listening and empathy, which is a are a part of Intellectual Openness. These skills will complement her already fully developed argumentation skills.

Mr. Silver continues his morning rounds, watching students log into the learning environment, getting their assignments and beginning to settle into work. The room is getting a bit quieter now. He also notices that attendance has crept up to 91% now. Maybe there won't be as many attendance calls today as he originally thought. He will have to review the list of who is scheduled to receive automated calls to see if there are any students who are on the "Watch List". This is the list of students who will need personalized calls this morning.

Feeling a bit more at ease, he checks into the talk to the Curriculum Coach. Mr. Sneedly has been the Curriculum Coach from the time of the school's founding. His job is to ensure that the use of technology supports student growth. Mr. Sneedly and Mr. Silver discuss the morning report and that it will show a lower level of engagement than normal and they begin to explore some of the reasons that this may be happening. Just then, Mr. Silver gets a call on his walkie-talkie.

The call is from the office and it is the Executive Director. Edgar notices that the workshops for the day are not posted yet. Since Mr. Silver is with Mr. Sneedly, he takes the opportunity to include him in the conversation. As it turns out the scheduled has been submitted to the display screens and the screens take a few minutes to refresh. After hearing that explanation the Executive Director understood and went about his business. Mr. Silver continued his morning rounds.

His next stop would be to visit with Mr. Gordon, the Dean of Students. Mr. Harris' main job is to ensure that the culture of Quest is strong and supportive of all students. Mr. Harris joined Quest after the 3rd year of operations and has seen the culture grow and become more entrenched. But, there are challenges and this is what Mr. Harris had asked to speak with Mr. Silver about.

While the students that were in grades 6 & 7 at the schools founding, are steeped in the purpose of Quest, the newer students have struggled with being so self-directed. When Mr. Harris met with one of the advisory groups, that has more than the normal ratio of new students, it was painfully clear that there is a discernible difference between the conception of new to older students.

The newer students feel less urgency about their own learning and seem to have less clear expectations about what the learning environment should be. As the two administrators brainstorm possible reasons why, a picture begins to emerge. The adults who founded Quest all had a much more intense on-boarding process than some of the newer adults. And in reflecting back to the specific advisory, the advisor for that group was one of the newer employees.

With this lead, Mr. Silver left Mr. Harris' office and began composing the question he would pose in his e-mail question to staff; "How can we expect students to embody a strong culture of success, if we don't ensure that all adults understand what that culture looks like: And, how do we ensure that we create a culture that endures change". That would be the big harry question for this Friday's professional development meeting and it would be bound to stir up a spirited discussion.

Appendices

Phase 1 Task List

Task	Milestone	Task ID	Activities	Plan Element	Person Responsible	Months Before School #1` Opens
X		1	Develop Personnel Manual	6	Executive Director (ED)	22
X		2	Develop Job Descriptions	6	Executive Director (ED)	22
X		3	Gain Board Approval on Finance P&P	8	Executive Director (ED)	20
X		4	Complete Charter Application	1	Executive Director (ED)	19
	X	5	Submit Charter Application	1	ED & Board of Directors	18
X		6	Select Payroll Provider	8	Executive Director (ED)	17
	X	7	Charter Application for School #1 Approved	1	Board of Directors	15
X		8	Expand Board of Directors	1	Board of Directors	15
X		9	Develop Website Announcing Quest	5	Executive Director (ED)	15
X		10	Sign Contract with Recruiting Agency	6	Executive Director (ED)	15
X		11	Port Quest Domain to Google Apps	7	Executive Director (ED)	15
X		12	Establish Facilities LLC	8	Executive Director (ED)	15
X		13	Develop Contract with IFF to Locate Building	9	Executive Director (ED)	15
X		14	Purchase School Spring Recruitment Service	4	Executive Director (ED)	15
	X	15	Recruit School Director for School #1	6	Executive Director (ED)	14
X		16	Hire HR Consultant	6	Executive Director (ED)	14
X		17	Develop IT Manual	7	Executive Director (ED)	14
X		18	Hire Finance Manager (Consultant)	8	Executive Director (ED)	14
X		19	Develop Contract with EdVisions for PD & Coaching	2	Executive Director (ED)	14
X		20	Hold Community Meetings & Get Input on School Design	5	Executive Director (ED)	13
X		21	Develop Crises Plan for Schools	10	ED & Co-Developer (1st School Dir)	11
X		22	Develop Initial Flow Chart for All CoS Processes	12	Executive Director (ED)	13
X		23	Purchase & Set Up QuickBooks	8	ED & IT Consultant	13

Task	Milestone	Task ID	Activities	Plan Element	Person Responsible	Months Before School #1` Opens
X		24	Develop Boot Camp & Identify Presenters	2	1st School Director	12
X		25	Develop PD on Relationship Building	3	ED & Co-Developer (1st School Dir)	12
	X	26	Recruit Staff for School #1	6	1st School Director	12
	X	27	Sign Contract with Principal	6	Executive Director (ED)	12
X		28	Develop 3 year IT Plan	7	Executive Director (ED)	12
	X	29	Secure Building Location	9	Executive Director (ED)	12
X		30	Develop Crises Plan for CoS	10	Executive Director (ED)	12
X		31	Design Career Planning Cycles	2	ED & Co-Developer (1st School Dir)	11
X		32	Recruit 1st Class (6th and 7th Graders)	5	ED & Co-Developer (1st School Dir)	11
X		33	Meet with Alderman in District of School #1	11	ED & Co-Developer (1st School Dir)	11
X		34	Meet with Neighborhood Groups and Stakeholders	11	ED & Co-Developer (1st School Dir)	11
X		35	Benchmark Carpe Diem and EdVisions	2	1st School Director	10
X		36	Develop Relationship with Intermediary for Internships	3	1st School Director	10
X		37	Port Quest Domain to Edmodo	7	ED & Co-Developer (1st School Dir)	10
X		38	Develop Plan for Business Resiliency	7	ED & Co-Developer (1st School Dir)	10
	X	39	Determine Which Student Asset Approach to Use	2	1st School Director	9
X		40	Set up District and School #1 in Edmodo	3	ED & Co-Developer (1st School Dir)	9
X		41	Develop Education Focus for School #1	2	1st School Director	9
X		42	Develop Format for Student Planning	2	1st School Director	8
X		43	Develop Parent Engagement Program	3	1st School Director	8
X		44	Develop Discipline Policy	2	1st School Director	8
X		45	Develop or Decide on Advisory Metrics	2	1st School Director	7
X		46	Finalize School Protocols for School #1	1	ED & Co-Developer (1st School Dir)	6
X		47	Develop Student Led Conferencing Format	2	1st School Director	6
X		48	Develop Contract with Food Service Provider	4	ED & Co-Developer (1st School Dir)	6
X		49	Develop Customer Service Protocols	5	ED & Co-Developer (1st School Dir)	6

Task	Milestone	Task ID	Activities	Plan Element	Person Responsible	Months Before School #1` Opens
X		50	Establish Account at Dept of Justice - Background Checks	6	ED & Co-Developer (1st School Dir)	6
X		51	Set up Shared File Server	7	ED & IT Consultant	6
X		52	Implement PC Backups	7	ED & IT Consultant	6
X		53	Develop System for Asset Tracking	8	ED & IT Consultant	6
X		54	Develop On-Boarding Checklist & Protocol	6	ED & Co-Developer (1st School Dir)	6
X		55	Purchase Project Foundry	4	ED & Co-Developer (1st School Dir)	6
X		56	Review Intervention Strategy (RiT)	2	ED & Co-Developer (1st School Dir)	5
	X	57	Hold Lottery for School #1	3	1st School Director	5
X		58	Develop Case Management Approach	3	ED & Co-Developer (1st School Dir)	5
X		59	Purchase Web Help Desk	7	ED & IT Consultant	5
X		60	Design Student Workshop Structure	2	1st School Director	5
X		61	Develop 1st Year Extracurricular Activities for School #1	2	ED & Co-Developer (1st School Dir)	4
X		62	Finalize Facility Plan for School #1	9	1st School Director	4
X		63	Purchase Student Furniture	4	ED & Co-Developer (1st School Dir)	4
X		64	Purchase Administration Furniture	4	ED & Co-Developer (1st School Dir)	4
X		65	Implement Health and Safety Tickets in Web Help Desk	10	ED & Co-Developer (1st School Dir)	4
X		66	Develop Workshop Recording, Storing & Posting Process	2	ED & IT Consultant	4
X		67	Develop Phy Ed Programming	2	1st School Director	3
X		68	Hold Boot Camp for School #1	2	1st School Director	3
X		69	Purchase instructional platform subscriptions	4	Executive Director (ED)	3
X		70	Development Intranet	7	ED & IT Consultant	3
X		71	Implement Facility Tickets in Web Help Desk	9	ED & Co-Developer (1st School Dir)	3
X		72	Hold Summer School for School #1	2	1st School Director	2
X		73	Implement IT Tickets in Web Help Desk	7	ED & IT Consultant	2
X		74	Develop Health and Safety Programming	10	ED and HR Consultant	2
X		75	Begin Faculty In-Services	3	1st School Director	1

Task	Milestone	Task ID	Activities	Plan Element	Person Responsible	Months Before School #1` Opens
X		76	Present EdVisions PD to Faculty	2	1st School Director	1
X		77	Present Project Foundry PD to Faculty	2	1st School Director	1
X		78	Present PD for instructional platforms to Faculty	2	1st School Director	1
	X	79	Open School #1	1	1st School Director	0

Quest Network Growth by School

School 1 Grades	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24
6th Grade		90	90	90	90	90	90	90	90	90	90	90
7th Grade		90	81	81	81	81	81	81	81	81	81	81
8th Grade			81	73	73	73	73	73	73	73	73	73
9th Grade				73	66	66	66	66	66	66	66	66
10th Grade					66	59	59	59	59	59	59	59
11th Grade						59	53	53	53	53	53	53
12th Grade							53	48	48	48	48	48
School 1 Totals	**0**	**180**	**252**	**317**	**375**	**428**	**475**	**470**	**470**	**470**	**470**	**470**

School 2 Grades	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24
6th Grade				90	90	90	90	90	90	90	90	90
7th Grade				90	81	81	81	81	81	81	81	81
8th Grade					81	73	73	73	73	73	73	73
9th Grade						73	66	66	66	66	66	66
10th Grade							66	59	59	59	59	59
11th Grade								59	53	53	53	53
12th Grade									53	48	48	48
School 2 Totals	**0**	**0**	**0**	**180**	**252**	**317**	**375**	**428**	**475**	**470**	**470**	**470**

School 3 Grades	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24
6th Grade					90	90	90	90	90	90	90	90
7th Grade					88	81	81	81	81	81	81	81
8th Grade						79	73	73	73	73	73	73
9th Grade							71	66	66	66	66	66
10th Grade								64	59	59	59	59
11th Grade									58	53	53	53
12th Grade										52	48	48
School 3 Totals	**0**	**0**	**0**	**0**	**178**	**250**	**315**	**374**	**426**	**474**	**470**	**470**

Quest Network Totals	`	180	252	497	805	995	1165	1271	1371	1413	1409	1409

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21st Century Skills Map

This 21st Century Skills Map is the result of hundreds of hours of research, development and feedback from educators and business leaders across the nation. The Partnership has issued this map for the core subject of English. This tool is available at www.21stcenturyskills.org.

The Partnership advocates for the integration of 21st Century Skills into K-12 education so that students can advance their learning in core academic subjects.

The Partnership has forged alliances with key national organizations that represent the core academic subjects, including Social Studies, English, Math, Science and Geography. As a result of these collaborations, the Partnership has developed this map to illustrate the intersection between 21st Century Skills and English. The maps will enable educators, administrators and policymakers to gain concrete examples of how 21st Century Skills can be integrated into core subjects.

A **21st Century Skills**

B **Skill Definition**

C **Interdisciplinary Theme**

D **Sample Student Outcome/Examples**

An example from the English 21st Century Skills Map illustrates sample outcomes for teaching Critical Thinking and Problem Solving.

PARTNERSHIP FOR 21ST CENTURY SKILLS

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Creativity and Innovation

ENGLISH

- *Demonstrating originality and inventiveness in work*
- *Developing, implementing and communicating new ideas to others*
- *Being open and responsive to new and diverse perspectives*
- *Acting on creative ideas to make a tangible and useful contribution to the domain in which the innovation occurs*

4th Grade

OUTCOME: Demonstrate originality and inventiveness in work.

EXAMPLE: After reading several trickster folktales, such as Coyote Stories or High John tales, and viewing two or three cartoons, students write their own contemporary version of a trickster story and present them as stop-motion or claymation films.

EXAMPLE: Students collect a variety of newspaper and magazine articles on a social or environmental issue. In small groups, they decide on an issue and a theme and style for a poem. They use words and phrases cut from the articles to create a "found poem" on their topic.

OUTCOME: Communicate new ideas to others.

EXAMPLE: Students select several photographs or pictures found on the internet that represent their individual personalities. They each write an autobiographical poem or series of poems and, using presentation software, make a slideshow of the pictures and poems that may include appropriate background music. As a class, students discuss how the pictures and music change their understanding of the poem.

8th Grade

OUTCOME: Demonstrate originality and inventiveness in work.

EXAMPLE: As the culmination of a unit of fantasy or investigative journalism reading, students write fanfic (stories set in the worlds of the books they read). Each story will introduce a contemporary realistic concern or issue, such as water shortage, vigilantism, or genetic engineering. Students may publish these works on the school website or on fanfic sites approved by the teacher.

EXAMPLE: Using the poem "Where I'm From" by George Ella Lyons and portions of the contemporary song of that same title by Digable Planets, students write poems based on their own backgrounds. Students make web pages of the poem, hyperlinking key words in the poem to photographs, illustrations, explanations, or other texts that enhance or explain the meaning. Students select three of their classmates' websites to link to on their site. Each link has a brief review of the page explaining why it was linked to.

OUTCOME: Be open and responsive to new and diverse perspectives.

EXAMPLE: Working in groups, students select concepts such as prosperity, justice, integrity, peace, or security. Each student in the group contributes one image to an online slideshow, such as ed.voicethread.com, that illustrates the concept or that show the absence of the quality.

12th Grade

OUTCOME: Develop and communicate new ideas to others.

EXAMPLE: After reading a dystopian novel such as *The Giver*, *The Lord of the Flies*, *The Handmaid's Tale*, or *Fahrenheit 451*, students will create a movie trailer that highlights universal questions raised by the novel. Students will view each others' trailers, write up notes critiquing them, and present their feedback in a "Siskel and Ebert" remake.

OUTCOME: Demonstrate originality and inventiveness in work.

EXAMPLE: Each student records a dramatic reading of a meaningful poem using appropriate inflection and expression. The meaning of the poem is enhanced with selection of appropriate music and video or still images. The student also records a commentary discussing the intentions of the work and a rationale for the creative decisions.

OUTCOME: Act on creative ideas to make a tangible and useful contribution to the domain in which the innovation occurs.

EXAMPLE: Working in teams, students research a global social issue, develop a problem scenario, and create an online game to teach younger students about this issue. For an example, see Hurricane Katrina: Tempest in Crescent City www.tempestincrescentcity.org.

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Creativity and Innovation (continued)

4th Grade

OUTCOME: Develop, implement and communicate new ideas to others.

EXAMPLE: Using an open-ended inspiration for writing such as Chris Van Allsburg's *Mysteries of Harris Burdick*, each student writes the beginning of a story and records it as a podcast. Students in other classes listen to the story, create the ensuing episodes, and record them as podcasts, until a final group writes and records the conclusions.

8th Grade

Group members and other classmates add audio or written responses commenting on the significance of the image to the concept.

OUTCOME: Develop and communicate new ideas to others.

EXAMPLE: Students write an audio commercial for a favorite short story using the conventions of movie trailers. They also add appropriate sound effects and background music. (Example movie trailers can be found at www.apple.com/trailers).

12th Grade

EXAMPLE: Students read works of digital fiction at http://wetellstories.co.uk. Students use one of the pieces as inspiration for a short work of their own.

Critical Thinking & Problem Solving

ENGLISH

- *Exercising sound reasoning in understanding*
- *Making complex choices and decisions*
- *Understanding the interconnections among systems*
- *Identifying and asking significant questions that clarify various points of view and lead to better solutions*
- *Framing, analyzing and synthesizing information in order to solve problems and answer questions*

4th Grade

OUTCOME: Identify and ask significant questions that clarify various points of view.

EXAMPLE: Students participate in literature circle discussions of a short story they read and for which they prepared an open-ended discussion question. They use a voice recorder to record their discussion. They then listen to the recording, evaluating the effectiveness of points raised in response to the questions, insights shared, and balance of participation. The recording may be published as a podcast.

OUTCOME: Frame, analyze and synthesize information in order to solve problems and answer questions.

EXAMPLE: After reviewing profiles at an entrepreneurial microfinancing site such as www.kiva.org, students research the economic and social impact of several proposals. Each student selects one proposal and writes an essay to persuade classmates to choose this proposal. The class creates an appropriate activity to raise the money to support the chosen proposal.

Financial Literacy

EXAMPLE: Using picture books and short nonfiction selected by the teacher, students will examine social injustices present in our society and multiple ways in which individuals take social action. Throughout the unit, students keep a reflective journal of the injustices people faced and the actions that overcame or

Civic Literacy

8th Grade

OUTCOME: Frame, analyze and synthesize information in order to solve problems and answer questions.

EXAMPLE: After writing an informative or persuasive piece, the student creates a "word cloud" of the writing using a tool such as wordle.com which represents the frequency of word use: the more frequent the word, the larger it is displayed. Students read their selection aloud with the word cloud projected on a screen. In groups, students analyze the visual representation and evaluate the match between the prominent words and the intention of the writer.

OUTCOME: Make complex choices and decisions.

Financial Literacy

EXAMPLE: Students conduct research to answer the question: How much schooling do you need to get the kind of job you would like to have? After researching salaries, employment outlook, and education/training requirements of a variety of possible careers, students create a chart comparing their top three to five choices and write short personal essays explaining how these choices fit their goals.

12th Grade

OUTCOME: Frame, analyze and synthesize information in order to solve problems and answer questions.

EXAMPLE: In small groups, students create a plan for involving students in making technology decisions in the school. The process may include gathering student input from surveys, establishing a student advisory committee, using students to help provide tech support or other services to the school, evaluating cost/value ratios, and fundraising proposals to support their recommended strategies. These plans should be used in a presentation to the principal or the school board.

EXAMPLE: Students choose an article from the satiric website www.theonion.com to analyze. In addition to identifying the elements of satire (exaggeration, incongruity, reversal, and parody) used in the article, students write a critique evaluating the effectiveness of the piece as commentary on current events.

OUTCOME: Identify and ask significant questions that clarify various points of view.

EXAMPLE: Working in groups, students follow the Twitter logs of a variety of newspapers for several days. Students compare these logs for the differences and similarities in the events posted and speculate on the significance, if any, of these comparisons.

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Partnership for 21st Century Skills

Critical Thinking & Problem Solving (continued)

4th Grade

diminished the injustice. As a class, students identify injustices, big and small, in their own world and brainstorm ways a young person could take action for change, even in a small way. One resource for this is, *How to Solve the Social Problems You Choose - And Turn Creative Thinking into Positive Action*, by Barbara A. Lewis.

8th Grade

OUTCOME: Identify and ask significant questions that clarify various points of view.

EXAMPLE: At the end of a short story unit, students brainstorm elements of effective short stories. Using a visual ranking tool (such as the Intel online visual ranking thinking tool), each student considers the short stories read in the unit and ranks them, using the comment feature of the tool to add explanations. The comparison function of the tool may be used to contrast ratings between students. Students can then discuss the reasons for the differences in rankings.

12th Grade

OUTCOME: Exercise sound reasoning in understanding.

EXAMPLE: Using an online visual search tool such as Many Eye's Word Tree, or http://services. alphaworks.ibm.com/manyeyes/home, students paste in a piece of text such as a poem or speech that contains rhetorical devices such as repetition. Select a word or phrase. All of the contexts for the word or phrase will be displayed in a tree-like branching. Use the visual as a basis for writing an analysis of recurrent themes and variations in the piece of text.

Communication

• *Articulating thoughts and ideas clearly and effectively through speaking and writing*

4th Grade

OUTCOME: Articulate thoughts clearly and effectively through writing, speaking, and visuals.

EXAMPLE: Each student chooses a class photograph or creates a piece of artwork that illustrates a favorite memory of the year. The student writes a narrative of the memory. The illustration and auditory recording of the essay are published on a secure educational site such as ed.voicethread.com. Classmates can record comments responding to the essay or to the illustration.

OUTCOME: Articulate thoughts clearly and effectively through writing and visuals.

EXAMPLE: Using an online comic strip generator such as Pixton for School, students create a graphic novel version of a short story or novel.

OUTCOME: Articulate thoughts clearly and effectively through writing and speaking.

EXAMPLE: Students pose a question about a local issue on a secure collaborative space such as ed.voicethread.com orwritingmatters.org. Each student gives a short written or recorded response to the issue. Invite community leaders to add their responses.

8th Grade

OUTCOME: Articulate thoughts and ideas clearly and effectively.

EXAMPLE: After viewing clips of Charlie Chaplin movies, students discuss the conventions of silent film such as brief captions and exaggerated facial expressions that communicate the story. They then create a silent movie version of a suspenseful short story such as an Edgar Allen Poe or Ray Bradbury story.

EXAMPLE: Students brainstorm topics that they were worried about when they started middle school/junior high school. They write a survival guide with tips on these topics. The survival guide may be published as a booklet or as a series of podcasts or videos to be shared with incoming students. Students could celebrate their collective accomplishments with a "publication party" to which parents and school leaders are invited.

OUTCOME: Articulate thoughts and ideas clearly and effectively through writing.

EXAMPLE: Students post short writings about class activities in a class journal or on a secure class bulletin board or wiki. Classmates ask and answer questions, clarify information, or share insights in their postings.

12th Grade

OUTCOME: Articulate thoughts clearly and effectively through writing, speaking, and multimedia.

EXAMPLE: As a culminating event after a poetry unit, students sponsor a coffeehouse night or a poetry slam. Themes or elements from each poem may be amplified with appropriate visuals or music.

OUTCOME: Articulate thoughts clearly and effectively through writing.

EXAMPLE: Students follow a variety of blogs written on topics of personal interest, posting their own comments as appropriate. After following these blogs for a period of time, students write a reflection on their online experience, how they found the blogs they were following, the differences in tone, content, and expertise between these blogs, the insights gained from these blogs, and their own role in the community.

EXAMPLE: Students translate a piece of dialog from a Shakespearean play into a text message exchange and analyze the effect of the writing mode on the tone or meaning of the dialogue. Students then discuss audience and purpose in relation to communication media.

PARTNERSHIP FOR
21ST CENTURY SKILLS

Standard ID	Standard Text	Lesson Name
R	Reading	
RL	Literature	
	Key Ideas and Details	
RL.CCR.1	Read closely to determine what the text says explicitly and to make logical inferences from it; cite specific textual evidence when writing or speaking to support conclusions drawn from the text.	
RL.6.1	Cite textual evidence to support analysis of what the text says explicitly as well as inferences drawn from the text.	Short Story: Dragon, Dragon Short Story: The King of Mazy May Short Story: The Bracelet Short Story: The Emperor's New Clothes
RL.CCR.2	Determine central ideas or themes of a text and analyze their development; summarize the key supporting details and ideas.	
RL.6.2	Determine a theme or central idea of a text and how it is conveyed through particular details; provide a summary of the text distinct from personal opinions or judgments.	Communication: Analyzing Formal Speech Communication: Effective Listening Skills
RL.CCR.3	Analyze how and why individuals, events, and ideas develop and interact over the course of a text.	
RL.6.3	Describe how a particular story's or drama's plot unfolds in a series of episodes as well as how the characters respond or change as the plot moves toward a resolution.	Skills Lesson: Character - Confronting Conflict

Standard ID	Standard Text	Lesson Name
RL.CCR.4	**Craft and Structure** Interpret words and phrases as they are used in a text, including determining technical, connotative, and figurative meanings, and analyze how specific word choices shape meaning or tone.	
RL.6.4	Determine the meaning of words and phrases as they are used in a text, including figurative and connotative meanings; analyze the impact of a specific word choice on meaning and tone.	Poem: The Sea Skills Lesson: Figurative Language Poem: John Henry
RL.CCR.5	Analyze the structure of texts, including how specific sentences, paragraphs, and larger portions of the text (e.g., a section, chapter, scene, or stanza) relate to each other and the whole.	
RL.6.5	Analyze how a particular sentence, chapter, scene, or stanza fits into the overall structure of a text and contributes to the development of the theme, setting, or plot.	Short Story: The Trailor Murder Mystery China: Yeh-Shen, A Cinderella Story
RL.CCR.6	Assess how point of view or purpose shapes the content and style of a text.	
RL.6.6	Explain how an author develops the point of view of the narrator or speaker in a text.	Short Story: The Bracelet
RL.CCR.7	**Integration of Knowledge and Ideas** Integrate and evaluate content presented in diverse media and formats, including visually and quantitatively, as well as in words.	
RL.6.7	Compare and contrast the experience of reading a story, drama, or poem to listening to or viewing an audio, video, or live version of the text, including contrasting what they "see" and "hear" when reading the text to what they perceive when they listen or watch.	
RL.CCR.8	Delineate and evaluate the argument and specific claims in a text, including the validity of the reasoning as well as the relevance and sufficiency of the evidence.	
RL.6.8	(Not applicable to literature)	Speech: On Women's Right to Vote

Standard ID	Standard Text	Lesson Name
RL.CCR.9	Analyze how two or more texts address similar themes or topics in order to build knowledge or to compare the approaches the authors take.	
RL.6.9	Compare and contrast texts in different forms or genres (e.g., stories and poems; historical novels and fantasy stories) in terms of their approaches to similar themes and topics.	Biography: The Calling to Find a Cure Interview: The Calling to Find a Cure
RL.CCR.10	**Range of Reading and Level of Text Complexity** Read and comprehend complex literary and informational texts independently and proficiently.	
RL.6.10	By the end of the year, read and comprehend literature, including stories, dramas, and poems, in the grades 6-8 text complexity band proficiently, with scaffolding as needed at the high end of the range.	Short Story: Dragon, Dragon Short Story: Everyday Use Short Story: The Lottery Short Story: The King of Mazy May Short Story: The Bracelet Short Story: Eleven Excerpt: The Adventures of Tom Sawyer, Chapter 6 Short Story: The Emperor's New Clothes Myth: The Twelve Labor of Hercules Short Story: The Fun They Had Folk Tales: How the Possum Lost the Hair on its Tail and Why the 'Gator is Black Myths: Ceres and Proserpina and The Trees and the Stag Short Story: An Episode of War Poem: The Sea Poem: The Sidewalk Racer

Standard ID	Standard Text	Lesson Name
RL.6.10	By the end of the year, read and comprehend literature, including stories, dramas, and poems, in the grades 6-8 text complexity band proficiently, with scaffolding as needed at the high end of the range. *(Cont'd.)*	Poetry: Steam Shovel and Your Poem, Man… Poem: John Henry Poetry: Mean Song, Analysis of Baseball Poem: Haiku by Basho Short Story: Older Run Short Story: The Trailor Murder Mystery Short Story: The Realm of the Unreal Poetry: Shel Silverstein - Jimmy Jet and His TV Set, One Inch Tall Europe: The Cinder Maid Vietnam: The Story of Tam and Cam China: Yeh-Shen, A Cinderella Story Native American: The Rough-Faced Girl Teleplay: Words on a Page Play: The Ugly Duckling Radio Play: The Hitchhiker Radio Play: The Time Machine
RI	**Informational Text** **Key Ideas and Details**	
RI.CCR.1	Read closely to determine what the text says explicitly and to make logical inferences from it; cite specific textual evidence when writing or speaking to support conclusions drawn from the text.	
RI.6.1	Cite textual evidence to support analysis of what the text says explicitly as well as inferences drawn from the text.	Writing: Essay - Character Sketch

Standard ID	Standard Text	Lesson Name
RI.CCR.2	Determine central ideas or themes of a text and analyze their development; summarize the key supporting details and ideas.	
RI.6.2	Determine a central idea of a text and how it is conveyed through particular details; provide a summary of the text distinct from personal opinions or judgments.	Personal Essay: All I Really Need to Know I Learned in Kindergarten Speech: On Women's Right to Vote
RI.CCR.3	Analyze how and why individuals, events, and ideas develop and interact over the course of a text.	
RI.6.3	Analyze in detail how a key individual, event, or idea is introduced, illustrated, and elaborated in a text (e.g., through examples or anecdotes).	Short Story: Older Run
RI.CCR.4	**Craft and Structure** Interpret words and phrases as they are used in a text, including determining technical, connotative, and figurative meanings, and analyze how specific word choices shape meaning or tone.	
RI.6.4	Determine the meaning of words and phrases as they are used in a text, including figurative, connotative, and technical meanings.	Poem: The Sea Skills Lesson: Figurative Language Poem: John Henry
RI.CCR.5	Analyze the structure of texts, including how specific sentences, paragraphs, and larger portions of the text (e.g., a section, chapter, scene, or stanza) relate to each other and the whole.	
RI.6.5	Analyze how a particular sentence, paragraph, chapter, or section fits into the overall structure of a text and contributes to the development of the ideas.	Short Story: The Trailor Murder Mystery China: Yeh-Shen, A Cinderella Story
RI.CCR.6	Assess how point of view or purpose shapes the content and style of a text.	
RI.6.6	Determine an author's point of view or purpose in a text and explain how it is conveyed in the text.	Short Story: The Bracelet

Standard ID	Standard Text	Lesson Name
RI.CCR.7	**Integration of Knowledge and Ideas** Integrate and evaluate content presented in diverse media and formats, including visually and quantitatively, as well as in words.	
RI.6.7	Integrate information presented in different media or formats (e.g., visually, quantitatively) as well as in words to develop a coherent understanding of a topic or issue.	Communication: Visual Analysis
RI.CCR.8	Delineate and evaluate the argument and specific claims in a text, including the validity of the reasoning as well as the relevance and sufficiency of the evidence.	
RI.6.8	Trace and evaluate the argument and specific claims in a text, distinguishing claims that are supported by reasons and evidence from claims that are not.	Speech: On Women's Right to Vote
RI.CCR.9	Analyze how two or more texts address similar themes or topics in order to build knowledge or to compare the approaches the authors take.	
RI.6.9	Compare and contrast one author's presentation of events with that of another (e.g., a memoir written by and a biography on the same person).	Biography: The Calling to Find a Cure Interview: The Calling to Find a Cure
RI.CCR.10	**Range of Reading and Level of Text Complexity** Read and comprehend complex literary and informational texts independently and proficiently.	
RI.6.10	By the end of the year, read and comprehend literary nonfiction in the grades 6-8 text complexity band proficiently, with scaffolding as needed at the high end of the range.	Autobiography: Summer Diamond Girl Personal Essay: All I Really Need to Know I Learned in Kindergarten Autobiography: The Story of My Life Biography: The Calling to Find a Cure Essay: Brother from I Know Why the Caged Bird Sings Essay: Searching for Stories

Job Descriptions
2013-2014

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Administrative Assistant

Supervisor: School Director or Executive Director.

Primary Role and Purpose:

Provide assistance of clerical and receptionist duties to ensure the efficient operation of the school or network office administration with direct supervision.

Education:

- High school diploma or GED.

Skills:

- Exceptional keyboarding skills.
- Proficient knowledge of Microsoft Office.
- Strong organization, communication and interpersonal skills. Able to follow written instructions.
- Able to operate multi-line phone system.

Experience:

- None required.

Responsibilities and Duties:

- Reception and Phones
  - Receive and route incoming calls, take accurate messages and direct to appropriate staff. Greet and guide visitors to central administration office.
  - Aid public, staff and students as needed.
  - Manage visitor record book and issue visitor passes. Other
  - Draft mailings and labels using personal computer.
  - Manage computerized files using personal computer including reports, staff roster and mailing list.
  - Sort and disperse mail, messages and other documents.
  - Assist with compiling materials for mailing, including making labels, preparing envelopes, etc.
  - Render clerical assistance when necessary. Ensure confidentiality.

Supervisory Responsibilities: None

Job Related Conditions:

- Maintain control in stressful situations. Manage time with frequent interruptions.

Curriculum Coach

Supervisor: School Director

Primary Role and Purpose: Assist the School Director in instructional program administration and school level data gathering and analysis. Maintain database of students assigned to interventions.   Act as the primary registrar of students on to the various instructional technology platforms.   Support teachers and students in their navigation and use of instructional technology.

Education:
- At least a bachelor's degree in education.

Skills:
- Working knowledge of charter operations.
- Exceptional organizational, communication and interpersonal skills.
- Capable of coordinating school's academic operations.
- Able manipulate data in Excel format.
- Experience with a school information system (PowerSchool, RenWeb, etc)
- Working knowledge about evaluation of curriculum, student progress.

Experience:
- At least 3 years of teaching experience

Responsibilities and Duties:
- Instructional Management
    - Assist in planning and assessing the educational programs.
    - Assist with planning and evaluating academic interventions.
    - Support the use of technology as a primary instructional tool.
    - Function as the primary system registrar for all instructional technology (setting up staff and student accounts).
    - Collaborate with students and teachers to ensure that instructional processes support student growth.
    - Support innovative education programs, assist teachers in implementing such efforts when appropriate.
- School Atmosphere
    - Encourage a constructive, thoughtful climate for learning.
    - Promote fairness of students and staff from all cultural backgrounds.
    - Communicate with students and staff in an effective manner.
- School Improvement
    - Assist in organization of school improvement plan with staff, parents and community members.
    - Help School Director to design, manage and implement information systems to manage and track progress on school goals and academic excellence indicators.
- Personnel Management
    - Assist with teacher evaluation conferences.
    - Assist Director in interviewing, selecting and orienting new employees.

- Administration and Fiscal/Facilities Management
  - Provide PD to school staff to enable the full use of available technology.
  - Assist in scheduling student activities by participating in the development of class schedules, teacher assignments.
  - Document schools academic needs of in order to compile yearly Annual Report with school administrators and staff.
  - Abide by all federal and state laws that apply to charter schools, and charter policy. Student Management
  - Provide for uniform enforcement of school rules and oversee appropriate and reasonable student discipline.
  - Enrich job skills through professional development.
- School and Community Responsibilities
  - Convey the school's mission to the public and encourage support in accomplishing the mission.
  - Demonstrate use of productive and efficient skills to raise community and parent involvement.

Supervisory Responsibilities:
- Oversee duties of the Instructional Advisors.
- Share supervisory duties for school professional staff with School Director.
- Teaching Responsibilities: On-going instruction and support of the instructional technology platforms for students and staff.

Job Related Conditions:
- Maintain control in stressful situations.
- Travel may be required.
- Extended and irregular hours.

Custodian

Supervisor: Director of Management Services.

Primary Role and Purpose:
Work at general maintenance and repair of school facilities, including but not limited to, mechanical, electrical, and sanitary systems. Assist with grounds maintenance.

Education:
- High school diploma or GED.

Skills:
- Capable of following verbal and written instructions.
- Working knowledge of basic construction and routine maintenance and repair procedures.
- Effective verbal communication skills.
- Capable of operating hand and power tools.
- Capable of independent work.
- Basic computer skills.

Experience:
At least one year of related experience.

Responsibilities and Duties:
- Maintenance
  - Help, under supervision of skilled worker, with general facility maintenance and repair, including repairing woodwork: replacing electrical switches, fixtures, and motors; painting, repairing, and replacing plumbing fixtures and drainage systems; and replacing broken glass.
  - Examine facility exterior and interior, equipment and grounds; perform maintenance and minor repairs.
  - Advise supervisor on all detected major facility repairs, including lockers, furniture and equipment.
  - Conduct all repairs as assigned by work order or supervisor.
  - Assist with ground maintenance including moving and detailing.
  - Assist with moving of furnishings, such as desks, tables, chairs, file cabinets, etc.
  - Move, install, assemble and repair all school furniture and equipment when requested.
  - Hang pictures, mirrors, blackboards, bulletin boards, projection screens, towel dispensers, soap dispensers and other items as requested.
  - Install door and window assemblies and hardware, including window glass and screens. Install ceiling and flooring materials.
- Driving
  - Transport school equipment and furniture with light truck operation.
- Safety
  - Use equipment and tools following school safety guidelines.
  - Follow school safety guidelines and techniques to accomplish job duties, including lifting.

- o   Make work area free of unsafe conditions and inform supervisor of problems that cannot be immediately corrected.
- o   Keep tools and equipment in optimum working order through required preventative maintenance.

Supervisory Responsibilities: None
- Job Related Conditions:
- Continual exposure to outside conditions.

Job Related Conditions:
- Maintain control in stressful situations. Manage time with frequent interruptions.
- Moderate lifting may be required.

Dean of Students

Supervisor: School Director

Primary Role and Purpose:

Develop and maintain a school culture that supports the Quest mission and vision. Assist the Director in instructional program administration and school level operations. Act as the 'chief culture officer' of the school.

Education:

At least a bachelor's degree in education.

Skills:

- Working knowledge of public/charter school operations.
- Exceptional organizational, communication and interpersonal skills. Capable of coordinating school's discipline related operations.
- Working knowledge about following discipline codes and student progress.
- Capable of using data to support a healthy school culture.

Experience:

- At least 3 years of teaching and/or administrative experience in public school settings as a disciplinary person.

Responsibilities and Duties:

- Instructional Management
  - Oversee school's operations in School Director's absence.
  - Assist in planning and assessing the educational programs.
  - Encourage planning of innovative culture building and disciplinary approaches, assist teachers in implementing such efforts when appropriate.
  - Encourage the use of technology in the culture building process.
- School Atmosphere
  - Develop and support a constructive, thoughtful climate for learning.
  - Promote fairness of students and staff from all cultural backgrounds.
  - Communicate with students and staff in an effective manner.
- School Improvement
  - Assist in organization of school improvement plan with staff, parents and community members.
  - Help the School Director, design, manage and implement information systems to manage and track progress on school's goals and academic excellence indicators.
- Personnel Management
  - Support employee evaluation conferences based on records of performance evaluation. Assist the School Director in interviewing, selecting and orienting new employees.
- Administration and Fiscal/Facilities Management
  - Assist in scheduling student activities by participating in the development of class schedules, teacher assignments and extracurricular activity schedules.
  - Organize safety drill practices and inspections.

- o Oversee student attendance records and assist the Administrative Assistant on truancy issues.
  - o Document non-academic needs of school in order to compile yearly Annual Report with school administrators and staff.
  - o Abide by all federal and state laws that apply to charter schools and charter policy.
- Student Management
  - o Provide for supervision of students during non-instructional hours.
  - o Help students develop positive behavior through a student discipline management system.
  - o Provide for uniform enforcement of school rules and oversee appropriate and reasonable student discipline.
  - o Hold parent/teacher/student conferences in regard to student and school issues.
- Professional
  - o Enrich job skills through professional development.
- School and Community Responsibilities
  - o Convey the school's mission to the public and encourage support in accomplishing the mission.
  - o Illustrate understanding of school and community needs and begin activities to meet those needs.
  - o Demonstrate use of productive and efficient skills to raise community and parent involvement.
- Supervisory Responsibilities:
  - o Share supervisory duties for school professional staff with school Director.

Job Related Conditions:
- Maintain control in stressful situations.
- Travel may be required.
- Extended and irregular hours.

Director of Finances

Supervisor: The Quest Board Chair and Executive Director

Primary Role and Purpose: Oversee and maintain the operation of all financial affairs of the network including accounting, payroll, purchasing, and risk management. Act as the chief financial adviser for the Quest Board of Directors.

Education:
- An MBA or a Master's degree in finance.

Skills:
- Working knowledge of charter school operations.
- Exceptional organizational, communication and interpersonal skills.
- Capable of coordinating network's financial operations.
- Applicable knowledge of school finance, budgeting, accounting systems, and economics.
- Effective communication, public relations, and interpersonal skills.
- Knowledge of personal computers and software to compile spreadsheets, perform data analysis, and do word processing.
- Knowledge of Quickbooks or other accounting software.
- Capable of interpreting policy, procedures, and data.
- Capable of managing budget and personnel.
- Some experience in a K-12 teaching and learning environment.

Experience:
- At least 5 years of educational business related experience

Responsibilities and Duties:
- Fiscal Management
  - Ensure Executive Director is advised on the business affairs of the network.
  - Analyze accounting practices, systems, and controls in all network departments and implement improvements in their structure and maintenance.
  - Manage a revolving auditing program for all funds and work with the network's independent and internal auditors while conducting audits.
  - Maintain accounting systems that comply with laws and regulations.
  - Devise period cash flow analysis to determine cash available for investment and payment of bills.
  - Collaborate with Executive Director and Director of IT to ensure that 3-year technology plan is realistic and cost effective.
  - Support the application and maintenance of the network's line of credit.
- Manage Network investment portfolio.
  - Supervise monthly bank settlement preparations for the operating, special revenue, debt service, construction, tax, cafeteria, and athletic accounts.
  - Audit statements of vendor and payroll clearing accounts.
  - Compile and enter all budget adjustments, additions, and deletions.

- o Assess and authorize all purchase orders and check requests and manage budget by certifying availability of funds.
  - o Help with drafting of budgets and assessing the long- and short-range objectives for the business operations of the network.
  - o Oversee needs evaluation for the enhancement of the network business operations.
  - o Collaborate with network personnel to project student enrollments, staff needs, building and facility needs, energy needs, capital equipment needs and other cost items for the Network and individual school improvement.
  - o Monitor the network's budgets and see that programs are cost effective and funds are managed effectively.
  - o Act as a network leader to achieve cost-effective practices throughout the network. Confirm that business operations support the network mission.
- Documentation and Law
  - o Ensure policies established by federal and state law that apply to charter schools, and Quest Financial Policy and Procedures are being followed.
  - o Manage all hardcopy and computerized reports, records, and other documents required.
  - o Compile and review monthly financial statements and budget reports.
  - o Draft comprehensive annual financial report.
  - o Draft quarterly and final reports for all federal funds.
- Inventory
  - o Ensure accurate computerized inventory records of all of the network's assets.
  - o Maintain and direct sales of surplus salvage equipment for disposal
  - o Requisition supplies, textbooks and equipment; verify inventory; manage records; and confirm receipts for materials.
  - o Oversee maintenance of replacement cost-asset inventory for insurance purposes. Receive and register bids, calculate results and draft written recommendations.
  - o Oversee the drafting of bids and bid specifications.
- Personnel Management
  - o Compile, check and revise finance related job descriptions.
  - o Devise training options and/or improvement plans to maintain superior business operations.
  - o Assess the finance dimensions of employees job performance to maintain effectiveness.
  - o Oversee personnel and make accurate recommendations in regards to assignments, retention, discipline, and dismissal.
- Community Affairs
  - o Show knowledge of school and community needs and implement programs to meet those needs.

Supervisory Responsibilities:
- Supervise and assess the performance of employees or consultants associated with: risk management, purchasing, bookkeeping, accounts payable, and payroll.

Job Related Conditions:
- Maintain control in stressful situations.
- Travel may be required.
- Extended or irregular hours.

Director of Information Technology

Supervisor: Executive Director

Primary Role and Purpose:

Manage the effective use of technology in the instructional environment. Ensure support of technology throughout the Quest network of schools.

Education:

- At least a bachelor's degree in IT or needed IT certifications.

Skills:

- Capable of designing and supporting a complex client server environment.
- Understanding of computer applications.
- Capable of repairing computer and technology equipment.
- Capable of troubleshooting and resolving computer problems.
- Capable of assessing and remedying network issues.
- Awareness of technologies available for use in instructional setting.
- Organizational, communication and interpersonal skills.

Experience: 3 years of technical support in a geographically separated organization.

Responsibilities and Duties:

- Technical Support
  - Ensure technical support to school personnel for use of technical equipment.
  - Ensure immediate on-site support to school staff with technology problems and questions.
  - Act as liaison with school IT Technicians.
  - Manage computers in campus labs and classrooms and arrange for needed repairs.
  - Maintain upgrades to technology equipment.
  - Aid in the organization and dissemination of technology materials for instructional use.
  - Collaborate with instructional personnel to evaluate various technology solutions.
  - Maintain the integrity of the Quest domain and ensure that sensitive information is not exposed to electronic intrusion and theft.
- Continuous Improvement
  - Research new platforms and technologies that will enhance the Quest Mission.
  - Ensure the effective integration of various technologies to minimize distractions to learning and the Quest Mission.
  - Monitor and enhance the Quest IT network to ensure maximum uptime and responsiveness.
  - Develop and propose cost effective improvements to network environment that will enhance the achievement of learning outcomes for students and staff.
- Inventory
  - Collaborate with Director of Finances to ensure school inventory of computer and lab materials is kept up to date and accurate.
  - Manage a cost effective technology repair parts inventory.

- o Manage a spares replacement program that informs the budgeting process for each school.
- Other
  - o Gather, manage and file all hardcopy and computerized reports, records and other documents required by school, state and federal policy.
  - o Abide by all policies established by federal and state law that apply to school schools
  - o Abide by all school routines and regulations.

Supervisory Responsibilities: IT Technicians located at each school.

Teaching Responsibilities: None

Job Related Conditions:
- o Travel may be required.
- o Heavy lifting possible.

Director of Management Services

Supervisor: Executive Director

Primary Role and Purpose:
Primary Role and Purpose: Oversee and maintain the operation of all 'back office' business operations. If the Finance Director is not available, oversee facilities, accounting, payroll, purchasing, and risk management and act as the financial advisor to the Executive Director and the Board of Directors.

Education:
- At least a bachelor's degree in education.

Skills:
- Capable of coordinating the network's business operations.
- Working knowledge of charter operations.
- Exceptional organizational, communication and interpersonal skills.
- Applicable knowledge of school finance, budgeting, accounting systems, and economics.
- Effective communication, public relations, and interpersonal skills.
- Knowledge of personal computers and software to compile spreadsheets, perform data analysis, and do word processing.
- Capable of interpreting policy, procedures, and data.
- Capable of managing budget and personnel.
- Some experience in a K-12 teaching and learning environment.

Experience:
- At least 5 years of educational or service business related experience

Responsibilities and Duties:
- Fiscal Management
  - Ensure School Directors are advised on the business affairs of their school.
  - Help with drafting of budgets and assessing the long- and short-range objectives for the business operations of the school.
  - Oversee needs evaluation for the enhancement of the school business operations.
  - Collaborate with school personnel to project building and facility needs, energy needs, capital equipment needs and other cost items for the school and individual school improvement.
  - Monitor the holding LLC and school budgets and see that schools and LLC are cost effective and funds are managed effectively.
  - Confirm that business operations support the network mission.
  - Develop and implement plan for business continuity.
- Documentation and Law
  - Ensure policies established by federal and state law that apply to charter schools, and Quest Board policy in area of business operations is being followed.
  - Manage all hardcopy and computerized reports, records, and other documents required.
- Inventory

- o Support the establishment of accurate computerized inventory records of all of the school's assets.
  - o Maintain and direct sales of surplus salvage equipment for disposal
  - o Requisition supplies, textbooks and equipment; verify inventory; manage records; and confirm receipts for materials.
  - o Oversee maintenance of replacement cost-asset inventory for insurance purposes. Receive and register bids, calculate results and draft written recommendations.
  - o Oversee the drafting of bids and bid specifications.
- Continuous Improvement
  - o Chair the School Operations Team
  - o Act as network leader to achieve cost-effective practices throughout the network
- Personnel Management
  - o Compile, check and revise business department job descriptions.
  - o Devise training options and/or improvement plans to maintain superior business operations.
  - o Assess job performance of employees and consultants to maintain operational effectiveness.
  - o Oversee Quest, LLC personnel and make accurate recommendations in regards to assignments, retention, discipline, and dismissal.
- Community Affairs
  - o Show knowledge of school and community needs and implement programs to meet those needs.

Supervisory Responsibilities:
- o Supervise and assess the performance of the facilities staff.
- o During start-up phase, supervises IT consultants, HR Consultants, Finance Consultants.

Job Related Conditions:
- Maintain control in stressful situations.
- Travel may be required.
- Extended or irregular hours.
- Moderate lifting may be required

Director of School Services

Supervisor: Executive Director.

Primary Role and Purpose:
Act as the academic leader of the Quest network, coaching, supporting and developing school leaders to meet ambitious school performance goals. Oversee School Services in a network of three schools in Milwaukee. This is an extraordinary opportunity for an educator to work closely with high performing, results-oriented School Directors and serve as a thought partner with multiple teams throughout the network.

Through coaching and developing school leaders, the Director of School Services is responsible for life-changing student achievement gains in all schools. This is a position for someone who thrives at the school site level, and offers the opportunity to have a major impact on network success. The Director is a key member of the senior leadership team, will be involved in the overall leadership of Quest.

Responsibilities and Duties:
- **Educational Leadership**
    - Ensure that all schools achieve dramatic student performance gains in all subject areas by performing coaching observations, reviewing data, performing classroom observations, and planning and participating in leadership team meetings.
    - Support, coach, and train, School Directors - Providing ongoing informal feedback.
    - Work with School Directors to set teacher professional development priorities for the year and to design outstanding site-based and network-wide professional development.
    - Work with School Directors and their staffs to design and implement rigorous intervention programs.
    - Work with Director of Human Capital to develop and maintain a talent pipeline.
    - Provide limited, direct coaching and support of teachers in the schools.
    - Create mid-year and end-of-year Professional Growth Plans (evaluations) for all School Directors of Quest.
- **Continuous Improvement**
    - Regularly review data to spot strengths and growth areas; work with School Directors to develop clear plans to address growth areas.
    - Hold monthly 1-on-1 meetings with each School Director (monthly reflection/data review, problem-solve around pressing issues, professional development planning).
    - Chair the Quest School Culture Team in assessing network-wide assessment and improvement in school culture and disciple.
    - Chair the Data and Curriculum Team in continually developing or locating world-class curricular resources.
    - Plan frequent co-observation days; highlight areas of strength and improvement in feedback during the day and prepare a more formal write-up after the observation day; work hand-in-hand with School Directors to address areas of school improvement.
    - Work with the other members of the Center of Support to design School Director and Dean of Students training; coordinate training meetings and conference calls.
    - Problem-solve solutions to challenges common to all schools via network-wide forums (meetings, conference calls, etc.).

- o Have regular check-ins with the School Directors and operations staff to ensure excellence in academic operations.
- o Problem-solve operational challenges, investing both School Directors and Center of Support staff in changes.
- o Understand the concerns and constraints of both the schools and Quest Center of Support teams in order to facilitate good working relationships.
- o Ensure that schools are getting top-quality services from all the Center of Support teams (recruitment, budget/finance, operations, curriculum, external, IT).
- o Serve on committee to select new School Directors.
- o Help to supervise the development and modification of Quest's curriculum and assessments.

Skills:
- Belief in the Quest Mission and educational model
- Ability to thrive in a fast-paced, entrepreneurial environment; flexible, able to work autonomously as well as take direction as needed
- Working knowledge of charter operations.
- Understanding of community needs and the ability to implement programs to meet those needs.
- Solid analytical, communication, influence and negotiation skills
- Strong coaching and people management skills
- Strong project management skills capable of seeing projects through from beginning to end
- Maturity, humility, strong work ethic, sense of humor, and "roll-up-the-sleeves" attitude
- Exceptional organizational, communication, public relations, and interpersonal skills.
- Knowledge of personal computers and software to compile spreadsheets, perform data analysis, and do word processing.
- Capable of interpreting policy, procedures, and data.
- Ability to inspire and influence others
- Ability to differentiate coaching
- Bachelor's degree from a competitive college or university

Experience:
- At least four years of experience as a principal, assistant principal, leadership coach, or similar support position at a highly successful school demonstrating a strong track record of student performance gains
- At least four years of highly effective teaching experience demonstrating a strong track record of student performance gains.

Supervisory Responsibilities:
- o Supervise and assess the performance of any shared instructional staff.
- o During start-up phase, supervises special education and educational consultants.

Job Related Conditions:
- Maintain control in stressful situations.
- Fast-paced environment, with a need to think on ones feet.
- Travel may be required.
- Extended or irregular hours.

Executive Director

Supervisor: Board of Directors.

Primary Role and Purpose:

Act as the chief operating officer for Quest, coaching, supporting and developing leaders for schools and the Center of Support to meet ambitious network performance goals. Build partnerships and relationships that support the network and involve the community. Oversee the instructional and operational program of the network of schools in Milwaukee.

Responsibilities and Duties:

- **Operational Leadership**
  - Develops and oversees all Quest Network operations, including schools, facilities, and ensuring alignment with Quest systems, policies, and metrics as well as local purposeful plans and requirements to meet growth goals in quality and quantity on an annual basis.
  - Ensures that a world-class education is developed and delivered for every student (curriculum and instructional strategies, school culture, student performance, asset building and character development).
  - Ensure that schools are getting top-quality service from all the Center of Support team (recruitment, budget/finance, operations, curriculum, external, IT).
  - Ensure that all schools achieve dramatic student performance gains in all subject areas by, analyzing data, planning and establishing systems for observation and coaching, and leading Leadership Team meetings.
  - Drives, coordinates, and supports all aspects of school start-ups (facilities planning, financing, staffing, marketing, charter application and re-application processes, development/philanthropic support).
  - Problem-solve operational challenges, investing both School Directors and Center of Support staff in changes.
  - Collaboratively establishes, codifies and enforces network policies and procedures.
- **Continuous Improvement**
  - Form and support the committee to recruit and select new School Directors.
  - Regularly reviews data to spot strengths and growth areas for the network.
  - Holds monthly 1-on-1 meetings with each network director (monthly reflection/data review, problem-solve around pressing issues, professional development planning).
  - Chairs the School Leadership Team in assessing network-wide improvement opportunities.
  - Oversee the Center of Support in designing network training and development opportunities through training meetings and conference calls and other media.
  - Problem-solve solutions to challenges common to all schools in network-wide forums (meetings, conference calls, etc.).
  - Have regular check-ins with the network directors and operations staff to ensure excellence in operations.
  - Understand the concerns and constraints of both the schools and Quest Center of Support teams in order to facilitate good working relationships.
- **Knowledge Management**

- o Leads strategy formation process with Board and deployment of developed objectives and strategies with input and support of CoS and school's directors.
- o Oversees all aspects of the human talent development model (recruiting, orientation, staff development and leadership training, evaluations, compensation systems, retention, staffing plans, and benefit planning).
- o Acts as a catalyst for efficient, accurate, and transparent business models (accounting, financing, purchasing, facilities management, technology, reporting, compliance, student recruitment, external funding, food and transportation services, and safety).
- o Research best practices and collaboratively determine which practices to adopt for the network that will enhance overall performance.
- o Create mid-year and end-of-year Professional Growth Plans (evaluations) for all network directors.
- o Ensures consistent network schedules, including school calendars, network training, and school compliance.
- **Development**
  - o Supports setting annual targets with Board and leads all fundraising efforts to meet annual targets.
  - o Acts as the networks public representative in both media relations and advocacy, representing the network to financial partners, foundations, auditors and public officials.
  - o Maintains and expands internal and external relationships.
  - o Leads a systematic internal communications plan.
  - o Serves as an ex-officio member of the Quest Board, maintaining alignment with the organization, exchanging critical information, coordinating the network's planning and implementation.

Key Characteristics
- o Mission-Driven - driven by a passion for U.S. education reform.
- o Personable and professional with a strong ability to develop relationships and a sense of "team and family".
- o Servant leader, who is able to continually raise the bar, confront the brutal facts, and inspire, equip, and support the team to achieve beyond their own expectations.
- o Strategic thinker and initiator who enjoys tackling challenges and overcoming obstacles.

Professional Competencies
- o Strong communication skills.
- o Able to simultaneously lead complicated and intense projects.
- o Possesses notable problem-solving skills.
- o Capable of delegating well and effectively monitoring the progress of team members.

Skills
- Belief in the Quest mission and educational model.
- Ability to thrive in a fast-paced, entrepreneurial environment; flexible, able to work autonomously as well as take direction as needed.
- Working knowledge of charter operations.
- Understanding of community needs and the ability to implement programs to meet those needs.
- Solid analytical, communication, influence and negotiation skills.
- Strong coaching and people management skills.
- Strong project management skills capable of seeing projects through from beginning to end.

- Maturity, humility, strong work ethic, sense of humor, and "roll-up-the-sleeves" attitude.
- Exceptional organizational, communication, public relations, and interpersonal skills.
- Knowledge of personal computers and software to compile spreadsheets, perform data analysis, and do word processing.
- Capable of interpreting policy, procedures, and data.
- Ability to inspire and influence others.

Experience:
- At least 5 years of senior management experience in an education environment.
- Experience with multiple funding streams.

Supervisory Responsibilities:
  - Supervises and assesses the performance of network directors.
  - During start-up phase, supervises various consultants.

Job Related Conditions:
- Maintain control in stressful situations.
- Fast-paced environment, with a need to think on ones feet.
- Travel may be required.
- Extended or irregular hours.

Instructional Advisor

Supervisor: Instructional Coach

Primary Role and Purpose: Under the direction of the Instructional Coach, assist certificated teachers in providing computerized instruction to individual and small groups of students in assigned learning activities. Organize and maintain the schools computer lab space; provide students with intensified learning experiences utilizing educational software to reinforce instruction in specified academic areas. Tutor, train, and assist students in the use of various instructional technologies.

Education:
- An associate's degree or 60 credits toward a bachelor's degree.

Skills:
- Working knowledge of charter operations.
- Exceptional organizational, communication and interpersonal skills.
- Ability to work with students.
- Above average computer skills.

Experience:
- At least 3 years of experience with young adults.

Responsibilities and Duties:
- Instructional Support
  - Answer questions and introduce students to, and assist them with, the use of computers and peripheral equipment (i.e., printer, scanner, digital camera, etc.) and educational software in math, language arts, social studies, spelling, reading, and other various assignments.
  - Reinforce instruction to individual and small groups of students as directed by teachers by assisting students with selecting appropriate educational software.
  - Assist teachers in finding programs to support their student(s) need(s); check programs, review and learn new programs.
  - Clean, check, and perform minor maintenance on equipment to ensure that it remains in operational condition.
  - Review and maintain records of students participating in computerized instructional support.
  - Make copies of memory media (CD, USB. etc).
  - May be required to administer first aid/CPR. Perform other related duties as assigned.
- School Atmosphere
  - Encourage a constructive, thoughtful climate for learning.
  - Promote fairness of students and staff from all cultural backgrounds.
  - Communicate with students and staff in an effective manner.
- School Improvement
  - Report errors and bugs in programs and suggest work around solutions.
- School and Community Responsibilities

- o Convey the school's mission to the public and encourage support in accomplishing the mission.
- o Demonstrate use of productive and efficient skills to raise community and parent involvement.

Job Related Conditions:
- Maintain control in stressful situations.
- Manage time with frequent interruptions.
- Moderate lifting may be required.

Information Technology Technician

Supervisor: Director of Information Technology

Primary Role and Purpose:

Manage the effective availability of technology in the instructional environment. Ensure support of technology throughout the school.

Education:

- At least a bachelor's degree in IT or needed IT certifications.

Skills:

- Capable of troubleshooting and resolving computer problems.
- Capable supporting a complex client server environment.
- Capable of assessing and remedying network issues.
- Understanding of computer applications.
- Awareness of technologies available for use in instructional setting.
- Capable of repairing computer and technology equipment.
- Organizational, communication and interpersonal skills.

Experience: 3 years of technical support.

Responsibilities and Duties:

- Technical Support
    - Provide technical support to school personnel for use of technical equipment.
    - Ensure immediate on-site support to school staff and students with technology problems questions.
    - Manage computers in lab area and classrooms and conduct minor repairs.
    - Maintain upgrades to technology equipment.
    - Aid in the organization and dissemination of technology materials for instructional use.
- Inventory
    - Support the accurate maintenance of school computer inventory and lab materials.
    - Maintain technology repair parts inventory.
- Other
    - Abide by all policies established by federal and state law that apply to schools.
    - Abide by all school routines and regulations.

Supervisory Responsibilities: None.

- Teaching Responsibilities: 5 – 10 hours per week

- Job Related Conditions:
    - Travel may be required.
    - Heavy lifting possible.

School Counselor

Supervisor: School Director.

Primary Role and Purpose:
Develop, implement, and assess a comprehensive guidance program for the school including counseling services. Promote a guidance program that shows students how their personal growth and development can be maximized. Maintain the advisory curriculum for the school.

Education:
- Bachelor's degree in psychology, counseling, or social work, M.S.W. or similar certification in counseling preferred.

Skills:
- Working knowledge of counseling procedures, student appraisal and career development.
- Superior organizational, communication and interpersonal skills.
- Capable of instructing students and managing their behavior.

Experience:
- At least two years of counseling experience in an educational setting.

Responsibilities and Duties:
- Guidance
  - Communicate the guidance program to students and parents.
  - Assist teachers to include guidance program with school curriculum.
  - Administer education programs and career awareness to individuals and student groups on an ongoing basis.
  - Ensure individual and small group counseling needs are met.
- Consultation
  - Confer with individuals associated with students to enhance their work with students.
  - Coach teachers in the use of socio-emotional supports for students.
  - Collaborate with school personnel and community residents to obtain effective resources for students.
  - Ensure special programs and services are utilized by students with an efficient referral process.
- Evaluation
  - Assist in devising and assessing a school standardized testing program.
  - Evaluate test and assessment results effectively.
  - Evaluate the effectiveness of external support service providers and recommend contract continuance or cancellation.
  - Provide on-going evaluation of the advisory program.
- Program Management
  - Develop a comprehensive guidance/counseling program that meets the identified needs of the student.
  - Plan and implement an ongoing assessment of the guidance program and make adaptations based on the results.

- o Gather, manage and file all required hardcopy and computerized reports, records and other documents.
  - o Develop and maintain an effective advisory program
  - o Provide professional development to all advisors on various advisory topics.
- Administration
  - o Act as the point of contact for the school in matters concerning mandatory reporting.
  - o Abide by policies established by federal and state law that apply to charter schools, and DPI rules that apply to charter schools, and charter policy in guidance and counseling area.
  - o Abide by all charter routines and regulations.
  - o Ensure a positive and constructive relationship with staff.
  - o Communicate with colleagues, students and parents in an effective manner.
- Professional
  - o Provide role model behavior that is professional, ethical and responsible.
  - o Partake in professional development to enhance skills related to job assignment.

- Supervisory Responsibilities:
  - o Oversee assigned counseling aides and clerical employees.

Job Related Conditions:
- Maintain control in stressful situations.

School Director (Principal)

Supervisor: Executive Director

Primary Role and Purpose:
>   Operate as the educational leader and chief educational officer of the school while implementing policies set by the board of directors and initiatives established with the Executive Director. Assume administrative responsibility for the planning, operation, supervision, evaluation and improvement of the education programs. Collaborate with the charter operational personnel to ensure that services and facilities support students and the school staff.

Education:
>   Minimum of a bachelor's degree, master's degree preferred.

Skills:
- Lead staff with developing instructional interventions and extensions.
- Knowledge of presenting and assessing project-based learning.
- Knowledge of on-line instruction and the ability to implement blended learning.
- Knowledge of school law, finance, and curriculum.
- Manage budgets and personnel.
- Interpret policy, procedures, and data.
- Exceptional organizational, communication, public relations, and interpersonal skills.

Experience:
- At least 5 years of teaching and 3 years of administrative experience. Preference given to experience in one of the following area: Project-Based Learning or On-Line Instruction.

Responsibilities and Duties:
- Instructional Leadership
    - Implement the Quest Absolutes (Personalized Education, High Productivity System, Holistic Discipline, Asset-Based Approach to learning).
    - Model the use of all data sources to ensure that the Quest Academic Goals are supported with capable instructional process.
    - Analyze data to implement continuous focus on improving student academic performance.
    - Work with staff, board, parents, and community to evaluate and plan curriculum improvements.
    - Develop, evaluate, and revise the school improvement plan annually with the input of the Board, Quest Process Improvement Teams and school staff.
    - Compile reports and assist the board in the evaluation of the effectiveness of school programs.
- School Morale
    - Support staff in the use of technology to enable a cohesive school culture.
    - Collaborate with Dean of Students (if applicable) to ensure that the Quest culture supports students and the instructional program.

- o Demonstrate skill in anticipating, managing, and resolving conflict.
- o Assure ongoing communication with all school and network personnel.
- School Improvement
  - o Analyze periodic evaluations of programs and operations to establish improvements needed to attain goals of school.
  - o Use a collaborative decision-making and problem solving process when possible.
  - o Encourage goal-oriented achievement that supports the Quest Strategic Objectives.
- Personnel Management
  - o Advise on the number and types of positions needed to fulfill the school functions effectively and organize the school's use of personnel resources.
  - o Select candidates and make offers of employment to candidates forwarded by the network office.
  - o Manage and support non-contractual personnel and contractual personnel.
  - o Designate assignments for all personnel.
  - o Designate the duties of all personnel.
  - o Encourage a positive work climate that promotes high staff morale and performance excellence in the school.
  - o Oversee the staff evaluation program.
  - o Collaborate with the Executive director to oversee the termination or suspension of employees or non-renewal of term-contract personnel.
  - o Collaborate with the Executive director to terminate non-contractual personnel.
  - o Serve as a liaison between the board, the Executive Director and staff.
  - o Advise school staff on pay systems, pay increases, or pay adjustments for personnel.
  - o Encourage and oversee coordination of all professional development activities.
- Management of Fiscal, Administrative and Facilities Functions
  - o Incorporate procedures and regulations to manage school operations and apply policies adopted by the board, while ensuring that all state and local requirements are met.
  - o Ensure all essential documents are compiled as requested by the board, the Wisconsin Department of Public Instruction, and other federal and state agencies and any records subpoenaed by a court of law.
  - o Participate in developing the annual school budget per policy.
  - o Consult with the Executive Director and the Director of Finance to ensure that the approved budget is being managed in accordance with policy.
  - o Collaborate with Executive Director to ensure that school facilities are maintained and that provisions are made for the safety of students, employees, and other users of the facilities.
  - o Keep informed on the status of school property to ensure that appropriate risk management and loss control strategies are employed.
- Student Management
  - o Provide positive educational environment through the practice of an impartial and effective system of student discipline management.
  - o Collaborate with the Executive Director, staff, the board and the community to ensure implementation of effective support services for students.
- School and Community Relations
  - o Produce and support open communications between the school, the parents, and the community.
  - o Encourage community support and involvement with the school.

- o Represent the school in activities involving other schools and professional and community groups.
- Professional Growth and Development
  - o Ensure a professional development plan is reviewed annually with the Executive Director.
  - o Engage in professional development through educational participation in conferences, organizations, and reading of professional development material.
- Supervisory Responsibilities:
  - o Maintain general supervision exercising authority over all school employees and over programs they are responsible for maintaining.
  - o Ensuring fiscal, academic and school accountability to the board.

Job Related Conditions:
- Maintain control in stressful situations.
- Travel may be required.
- Extended and irregular hours.

Special Education Teacher

Supervisor: School Director.

Primary Role and Purpose:
Provide special education students with appropriate learning activities and experiences that will enable them to fulfill their potential for intellectual, emotional, physical and social growth. Develop student ability level instructional materials through modified curriculum and prepared lesson plans. Conduct work in self-contained, team, departmental or itinerant capacity as necessary.

Education:
- Valid Wisconsin teaching certificate with required special education endorsements for assignments.

Skills:
- Complete knowledge of special needs of students in assigned area.
- Complete knowledge of Individual Education Plan (IEP) goal setting process and implementation.
- Working knowledge of curriculum and instruction.

Experience:
- At least one year of teaching experience.

Responsibilities and Duties:
- Instructional Strategies
  - Work in conjunction with students, parents and other members of staff to develop IEPs for each student assigned.
  - Design, write and use instructional, therapeutic or skill development program for assigned students and ensure written plan is available for review.
  - Ensure comprehension of learning styles and student needs are met through creation and implementation of appropriate instructional and learning strategies, activities, materials and equipment.
  - Collaborate with classroom teacher on student IEP to ensure all modifications are met and help special education students in regular class when appropriate.
  - Design instructional activities by using data from students learning styles assessment.
  - Ensure IEP guidelines are met when presenting subject matter.
  - Use an assortment of media and techniques to meet the needs and capabilities of each student assigned.
  - Produce and oversee the teacher aide and volunteer assignments.
  - Employ technology practices to strengthen the instructional process.
- Growth and Development
  - Produce formal and informal testing to evaluate student success.
  - Oversee or ensure personal care, medical care and feedings of students as stated in IEP.
  - Manage and care for all extracurricular duties as assigned.
  - Sponsor outside activities approved by School Director.
  - Serve as an example for students; support mission of school.
- Classroom Management

- o Prepare classroom to enhance learning and aid in the physical, social and emotional development of the students.
  - o Control student behavior and implement discipline plan. This includes handling crisis situations and physically restraining students as necessary according to IEP.
  - o Collaborate with the classroom teachers regarding student behavior management programs according to IEP.
  - o Collaborate with school and outside resource people regarding education, social, medical and personal needs of student.
  - o Ensure necessary and reasonable measures are taken to protect students, equipment, materials and facilities.
  - o Provide input on equipment and material selection.
- Communication
  - o Ensure good communication rapport with parents, students, Directors and teachers and staff through conferences.
  - o Create and maintain a professional relationship with colleagues, students, parents and community members.
  - o Present information accurately through clear communication skills.
- Other
  - o Enrich job skills through professional development activities.
  - o Keep up to date and abide by federal, state and school policies for special education teachers.
  - o Provide professional development to staff on pertinent special education topics.
  - o Gather, manage and file all reports, records and other documents required.
  - o Be active in faculty meetings and assist in staff committees as required.
- Supervisory Responsibilities:
  - o Oversee assigned teacher aide, if applicable.

Job Related Conditions:
- Maintain control in stressful situations.
- May be required to restrain students to control behavior.

Teacher

Supervisor: School Director.

Primary Role and Purpose:
Provide students with appropriate educational activities and experiences that will enable them to fulfill their potential for intellectual, emotional, physical and social growth. Help students develop the skills necessary to be productive members of society.

Education:
- Bachelor's Degree in Education, with appropriate teacher certification.

Skills:
- Understanding of subjects assigned.
- Working knowledge of curriculum and instruction.
- Capable of instructing students and managing their behavior. Exceptional organizational, communication and interpersonal skills.

Experience:
- At least student teaching experience required.

Responsibilities and Duties:
- Instructional Strategies
    - Monitor student progress on and in the instructional platform.
    - Use internal social media functionality to build community within the school.
    - Review and approve student project proposals.
    - Provide on-going project management coaching for student projects to ensure adequate progress is occurring.
    - Supervise students through external projects to ensure that external interactions are safe and productive.
    - Participate in team evaluations of projects to ensure that they meet the instructional requirements.
    - Design, write and use lesson plans for interventions that support the school's curriculum. Ensure written plans are available for review.
    - Ensure lesson plans show modifications for differences in student learning styles.
    - Teach instructional subjects according to guidelines established by Wisconsin Academic Standards, school polices and administrative regulations.
    - Implement appropriate instructional and learning strategies, activities, materials and equipment to ensure comprehension of learning styles and student needs.
    - Design instructional activities by using data from student learning style assessments.
    - Collaborate with special education teachers on student Individual Education Plans (IEP) to ensure all modifications are met.
    - Collaborate with staff to determine school requirement for the instructional goals, objective and methods.
    - Employ technology practices to strengthen the instructional process.
- Growth and Development
    - Help students assess and enhance their study methods and habits.

- o Produce formal and informal testing to evaluate student success.
  - o Coordinate and manage extracurricular duties as assigned.
  - o Sponsor outside activities approved by the school Director.
  - o Serve as an example for students, support mission of school.
- Classroom Management and Organization
  - o Prepare classroom to enhance learning and to aid in physical, social and emotional development of students.
  - o Support student behavioral goals in agreement with their Individual Learning Plans and the Parent/Student Handbook.
  - o Ensure necessary and reasonable measures are taken to protect students, equipment, materials and facilities.
  - o Provide input on equipment and material selection.
- Communication
  - o Establish communication rapport with parents, students, Directors through conferences.
  - o Create and maintain a professional relationship with colleagues, students, parents and community members.
  - o Present information accurately through clear communication skills.
- Professional
  - o Enrich job skills through professional development activities.
- Other
  - o Keep up to date on and abide by state and school regulations and policies for classroom teachers.
  - o Gather, manage and file all reports, records and other documents required.
  - o Be active in faculty meeting and assist in staff committees as necessary.

Supervisory Responsibilities: Oversee assigned teacher aide.

Job Related Conditions:
- Maintain control in stressful situations.
- Extended hours may be required.
- Some lifting may be required.